



**School Board of Leon County, Florida
District Term Contract
DTC-24-1029**

District-Wide Classification and Compensation Study Services

This Contract is between the School Board of Leon County, a public school district within Leon County, Florida, with offices at 2757 West Pensacola Street, Tallahassee, FL 32304 (District), and Evergreen Solutions, LLC, (Contractor) located at 2528 Barrington Circle, Unit 201, Tallahassee, FL 32308. The District and Contractor are collectively referred to herein as "Parties" and individually as a "Party." All capitalized terms shall have the meaning assigned to them in the Contract unless otherwise defined here.

The Contractor responded to the District's Request for Proposals, No. RFP 241-2024, District-Wide Classification and Compensation Study. The District has accepted the Contractor's Proposal and entered into this Contract in accordance with the terms and conditions of RFP 241-2024, District-Wide Classification and Compensation Study. Accordingly, and in consideration of the mutual promises contained in the Contract, the Parties agree as follows:

I. Scope of Work

The services and/or commodities to be provided by the Contractor are defined in RFP 241-2024, District-Wide Classification and Compensation Study, and all Addenda, which are referenced and incorporated herein. The Contractor's proposal is attached as Exhibit B. The Task Schedule & Pricing sheet is attached as Exhibit C.

II. Contract Term

The initial term of the Contract is for one (1) year. The initial Contract term shall begin on July 1, 2024, or on the last date on which it is signed by all Parties, whichever is later.

The District and the Contractor may renew the Contract in whole or in part, for a renewal term not to exceed one (1) year, or a portion thereof.

III. Contract

This Contract, together with the following attached documents (Exhibits), sets forth the entire understanding of the Parties and supersedes all prior agreements, whether written or oral, with respect to such subject matter.

All Exhibits attached to this Contract are incorporated in their entirety and form part of this Contract. The Contract has the following Exhibits:

1. Exhibit A: RFP 241-2024, District-Wide Classification and Compensation Study
2. Exhibit B: Vendor's Response to RFP 241-2024, District-Wide Classification and Compensation Study
3. Exhibit C: Task Schedule and Price Sheet

In case of conflict, the documents shall have priority in the order listed:

1. The District Term Contract
2. Exhibit A
3. Exhibit B
4. Exhibit C

IV. Amendments

No oral modifications to this Contract are acceptable. All modifications to this Contract must be in writing and signed by both Parties, except changes to Section VII., below. Any future amendments of the Contract, which alter the definition of the services, shall define the services in the same format as Exhibit A.

Notwithstanding the order listed in Section IV, amendments issued after Contract execution may expressly change the provisions of the Contract. If an amendment expressly alters the Contract, then the most recent amendment will take precedence.

V. Contract Notices

Contract notices may be delivered by email to the Contractor's designated contact person as prescribed in Section VIII.

VI. Contract Management

The District's Contract Manager is:

Vicki Morrison, Coordinator
Leon County School Board
2757 West Pensacola Street
Tallahassee, Florida 32304
Telephone: 850-487-7127
Email: morrisonv@leonschools.net

The District may appoint a different Manager, which will not require an amendment to the Contract, by sending written notice to the Contractor. Any communication to the District relating to the Contract shall be addressed to the District's Contract Manager or designee.

The Contractor has assigned the following individual(s) to serve as the designated contact person for this Contract:

Primary Contact:
Stasey Whichel, Project Manager
Evergreen Solutions, LLC
2528 Barrington Circle, Unit 201
Tallahassee, Florida 32308
Telephone: 850-728-9680
Email: stasey@consultevergreen.com

All questions and customer service issues concerning this Contract shall be directed to the Contractor's designated contact person(s), above. It will be the designated contact person's responsibility to coordinate with necessary District personnel, as required, to answer questions and resolve issues. The

Contractor must provide written notice to the District's Contract Manager or designee, if a new employee is designated as the contact person for this Contract.

VII. Termination

A. Termination for Convenience

This Contract may be terminated by either Party at will upon no less than 30 calendar days written notice unless a shorter period of time is mutually agreed upon by both Parties. The Board's sole obligation shall be to reimburse the Contractor for those goods or services shipped and accepted by the Board up to the date of termination, and costs incurred by the Contractor for unfinished goods, which are specifically manufactured for the Board and which are not standard products of the Contractor, as of the date of termination. In no event shall the Board be responsible for the loss of anticipated profit. Notice shall be delivered by certified mail (return receipt requested), by another method of delivery whereby an original signature is obtained, or in person with proof of delivery.

B. Termination for Cause

If a breach of this Contract occurs by the Contractor, the District may terminate the Contract for cause. The District chooses to provide, at its exclusive option, an opportunity for the Contractor to cure the breach for cause within 30 calendar days upon written notice of the deficiency by the District. Any breach of this Contract, which is still left uncured by the Contractor after the District has elected to provide 30 calendar days to cure (remedy) the breach, may result in the District's termination of this Contract upon 24 hours written notice by the District. If the District does not elect to afford an opportunity for the Contractor to cure a breach (e.g. instances of egregious Contractor conduct or other Contractor actions which may be harmful to the District), the District may immediately terminate this Contract for cause, upon 24 hours' written notice to the Contractor, as described in this section. Notice shall be delivered by certified mail (return receipt requested), in person with proof of delivery, or by another method of delivery whereby an original signature is obtained.

C. Termination for Unauthorized Employment

Violation of the provisions of Section 274A of the Immigration and Nationality Act shall be grounds for unilateral cancellation of this Contract.

D. Termination for Lack of Funds

In the event the funds to finance this Contract become unavailable, the District may terminate the Contract upon no less than 24 hours' notice, in writing, to the Contractor. Notice shall be delivered by certified mail (return receipt requested), in-person with proof of delivery, or by another method of delivery whereby an original signature is obtained. The District shall be the final authority as to the availability of funds.

E. Contract Termination Requirements

If at any time, the Contract is cancelled, terminated, or otherwise expires, and a Contract is subsequently executed with a contractor other than the Contractor or service delivery is provided by the District, the Contractor has the affirmative obligation to assist in the smooth transition of Contract services to the subsequent provider. This includes but is not limited to, the timely provision of all Contract-related documents, information, and reports not otherwise protected from disclosure by law to the replacing party.

VIII. Assignment

The Contractor shall not sell, assign, or transfer its responsibilities or interests under this Contract to another party without prior written approval of the District's Contract Manager or designee. The District shall, at all times, be entitled to assign or transfer its rights, duties, and obligations under this Contract to another governmental agency or special district of the State of Florida upon providing written notice to the Contractor.

IX. Subcontracts

The Contractor is fully responsible for all work performed under this Contract. The Contractor may, upon receiving written consent from the District's Contract Manager or designee, enter into written subcontract(s) for performance of certain obligations under this Contract. No subcontract shall relieve the Contractor of any responsibility for the performance of its contractual duties. All payments to subcontractors shall be made by the Contractor.

It is understood and agreed that the District shall not be liable to any subcontractor for any expenses or liabilities incurred under the subcontract and that the Contractor shall be solely liable to the subcontractor for all expenses and liabilities under this Contract. All subcontractors are subject to the same background check requirements as are referenced in Exhibit A.

X. Price Adjustments

Any price decrease effectuated during the Contract period by reason of market change or special sales offered to other customers shall be passed on to the District. This shall also apply to all in-place equipment on a rent or lease plan. Price increases are not accepted unless otherwise stated. All prices are firm and shall be held for the duration of the Contract term. The District may, at its sole discretion, review a request from the Contractor for an equitable adjustment in Contract pricing if pricing or supply availability is affected by extreme or unforeseen conditions in the marketplace outside of the Contractor's control. Requests shall be submitted to the District's Contract Manager along with justification and backup information, as necessary, such as a letter from a manufacturer regarding price increases. The District will consider the request and respond within 30 days. The Contractor shall continue to fill orders at the current Contract pricing until a decision has been made.

XI. Additions/Deletions

During the term of the Contract, the District reserves the right to add or delete the number of commodities or services when considered to be in its best interest. Pricing shall be comparable to amounts awarded.

XII. Other Conditions

A. Public Records

The Contractor agrees to (a) keep and maintain public records required by the Board to perform the service; (b) upon request from the Board's custodian of public records, provide the Board with a copy of the requested records or allow the records to be inspected or copied within a reasonable time at a cost that does not exceed the cost provided in Florida Statute; (c) ensure that public records that are exempt or confidential and exempt from public records disclosure requirements are not disclosed except as authorized by law for the duration of the Contract term and following completion of the Contract if the Contractor does not transfer the records to the Board; and (d) upon completion of the

Contract, transfer, at no cost to the Board all public records in possession of the Contractor, or keep and maintain public records required by the Board to perform contractual obligations. If the Contractor transfers all public records to the Board upon completion of the Contract, the Contractor shall destroy any duplicate public records that are exempt or confidential and exempt from public record disclosure requirements. If the Contractor keeps and maintains public records upon completion of the Contract, then the Contractor shall meet all applicable requirements for retaining public records. All records stored electronically must be provided to the Board, upon request, in a format that is compatible with its information technology systems. The Board may unilaterally terminate the Contract for refusal by any Contractor to allow public access to all documents, papers, letters, or other material made or received by the Contractor in conjunction with the Contract unless the records are exempt from Section 24(a) of Art. I of the State Constitution and either Section 119.07(1), F.S. or Section 119.071, F.S. Additionally, the Contractor may be subject to penalties under Section 119.10, F.S.

If the Contractor has questions regarding the application of Chapter 119, Florida Statutes, to the Contractor's duty to provide public records relating to this Contract, contact the custodian of public records at:

Leon County Schools

ATTN: Julie Jernigan

2757 West Pensacola Street

Tallahassee, Florida 32304

Telephone: (850) 487-7177

Email: jerniganj@leonschools.net

B. Disputes

Any dispute concerning the performance of the terms of this Contract shall be resolved informally by the Contract Managers. Any dispute that cannot be resolved informally shall be reduced to writing and delivered to the District's Assistant Superintendent of Business Services or designee. The District's Assistant Superintendent of Business Services, or designee, shall decide the dispute, reduce the decision to writing, and deliver a copy to the Parties, the Contract Managers, and the District's Contract Administrator.

C. Notices

All notices required or permitted by this Contract shall be given in writing and by hand delivery or email to the respective Parties. All notices by hand-delivery shall be deemed received on the date of delivery and signature of person receiving, and all notices by email shall be deemed received when they are transmitted and not returned as undelivered or undeliverable. Both Parties may change their contact information and Contract Manager by written notice given to the other Party as provided above.

D. Insurance

The Contractor agrees to provide adequate insurance coverage on a comprehensive basis and to hold such insurance at all times during the existence of this Contract. The Contractor accepts full responsibility for identifying and determining the type(s) and extent of insurance necessary to provide reasonable financial protection for the Contractor and the District under this Contract. At a minimum, this coverage shall include general liability coverage no less than \$1 million per occurrence and \$2

million in aggregate. Upon the execution of this Contract, the Contractor shall furnish the District's Contract Manager, or designee, written verification of such insurance coverage. Such coverage may be provided by a self-insurance program established and operating under the laws of the State of Florida. The District reserves the right to require additional insurance where appropriate.

If the Contractor is a state agency or subdivision as defined in Section 768.28, F.S., the Contractor shall furnish the District, upon request, written verification of liability protection in accordance with Section 768.28, F.S. Nothing herein shall be construed to extend any Party's liability beyond that provided in Section 768.28., F.S.

E. Indemnification

The Contractor shall be liable and agrees to be liable for, and shall indemnify, defend, and hold the District, Board, its employees, agents, officers, heirs, and assignees harmless from any and all claims, suits, judgments, or damages including court costs and attorney's fees arising out of intentional acts, negligence, or omissions by the Contractor, or its employees or agents, in the course of the operations of the Contract, including any claims or actions brought under Title 42 USC §1983, the Civil Rights Act.

This Contract does not constitute a waiver of sovereign immunity or consent by the Board to suit by third parties in any related matter.

F. Employee Status

This Contract does not create an employee/employer relationship between the Parties. It is the intent of the Parties that the District and Contractor are independent contractors under this Contract and neither is the employee of the other for all purposes, including, but not limited to, the application of the Fair Labor Standards Act minimum wage and overtime payments, Federal Insurance Contribution Act, the Social Security Act, the Federal Unemployment Tax Act, the provisions of the Internal Revenue Code, the State Workers Compensation Act, and the State unemployment insurance law.

G. Force Majeure

Neither Party shall be liable for loss or damage suffered as a result of any delay or failure in performance under this Contract or interruption or performance resulting directly or indirectly from acts of God, fire, explosions, earthquakes, floods, water, wind, lightning, civil or military authority, acts of public enemy, war, riots, civil disturbances, insurrections, strikes, or labor disputes.

H. Available Funding

The District's performance and obligation to pay for goods and services under this Contract are contingent upon available annual funding. The costs of services paid under any other Contract or from any other source are not eligible for reimbursement under this Contract.

I. Scrutinized Companies Contractor Certification

The Contractor certifies they are not listed on the Scrutinized Companies that Boycott Israel List, created pursuant to Section 215.4725, F.S., and they are not currently engaged in a boycott of Israel. If the resulting Contract exceeds \$1,000,000.00 in total, (not including renewal years), the Contractor certifies that they are not listed on either the Scrutinized Companies with Activities in Sudan List, or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List created pursuant

to Sections 215.473, F.S., and 215.4725, F.S., and further certifies they are not engaged in business operations in Cuba or Syria. Pursuant to Sections 287.135(5), F.S., and 287.135(3), F.S., the Contractor agrees the District may immediately terminate the resulting Contract for cause if the Contractor is found to have submitted a false certification or if the Contractor is placed on the Scrutinized Companies with Activities in Sudan List, the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List, the Scrutinized Companies that Boycott Israel List, or is engaged in a boycott of Israel, or has engaged in business operations in Cuba or Syria during the term of the resulting Contract. Any company that submits a bid or proposal for a Contract, or intends to enter into or renew a Contract with an agency or local governmental entity for goods or services of any amount, must certify that the company is not participating in a boycott of Israel.

J. E-VERIFY

In accordance with Section 448.095, Florida Statutes, the Parties shall utilize the U.S. Agency of Homeland Security's E-Verify system, <https://e-verify.uscis.gov/emp>, to verify the employment eligibility of all employees hired during the term of this Agreement.

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This Contract, including all attachments, exhibits, and amendments, contains the entire understanding of the parties concerning the subject matter and supersedes all prior agreements, oral or written, and all other communications between the parties relating to such subject matter. This Contract may not be amended or modified except by mutual written agreement unless expressly stated herein.

In **WITNESS THEREOF**, the parties hereto have caused this Contract to be executed by their undersigned officials as duly authorized.

EVERGREEN SOLUTIONS, LLC



Dr. Jeff Ling, President, or designee

June 26, 2024

Date

SCHOOL BOARD OF LEON COUNTY, FLORIDA



Rosanne Wood, Board Chair

6/18/2024

Date



Rocky Hanna, Superintendent

6/18/2024

Date

Exhibit C

Task Schedule & Price Sheet

The vendor will be compensated under this contract in an amount not to exceed \$58,500. This rate includes all costs associated with performing and completing the requirements of the Scope of Services, such as travel, supplies, equipment, training, overhead, and profit.

Task	Completion Date	Payment (% of Total)
Task 1: Project Initiation	July 1, 2024	25%
Task 2: Evaluation of the Current System	July 8, 2024	
Task 3: Collect and Review Current Environment Data	August 9, 2024	25%
Task 4: Evaluate and Build a Projected Classification Plan and Make FLSA Determinations	September 6, 2024	
Task 5: Identify a List of Market Survey Benchmarks and an Approved List of Targets	September 20, 2024	25%
Task 6: Conduct a Market Salary and Benefits Survey and Provide an External Assessment Summary	October 31, 2024	
Task 7: Develop Strategic Positioning Recommendations	November 29, 2024	15%
Task 8: Conduct Solution Analysis	December 31, 2024	
Task 9: Develop and Submit Draft and Final Reports	January 17, 2025	
Task 10: Develop Recommendations for Compensation Administration	February 7, 2025	
Task 11: Provide Updated Class Descriptions	March 31, 2025	10%

Request for Proposals (RFP)



"Preparing students to become responsible, respectful, independent learners equipped with the critical thinking skills necessary to compete in our global society."



District-Wide Classification and Compensation Study

RFP 241-2024

RFP Released: December 1, 2023

Deadline for Questions*: December 8, 2023

Proposals Due*: 2:00 p.m. on January 11, 2024

Staci Copppinger
Procurement Officer
Leon County Schools
Purchasing Department
3397 West Tharpe Street
Tallahassee, Florida 32303

*Timeline subject to change. Changes will be communicated through an addendum to this RFP (see Section 1.8)

RFP Timeline

Steps in the RFP process	Date and Time	Location (if applicable)
Release of RFP	December 1, 2023	District Website https://www.leonschools.net/Page/4411 DemandStar https://www.demandstar.com
Written Questions Due	December 8, 2023	Submit to: Staci Copppinger, Procurement Officer Subject: RFP 241-2024, District-Wide Classification and Compensation Study Email: purchasing@leonschools.net
Anticipated Posting of Answers to Submitted Questions	December 14, 2023	District Website https://www.leonschools.net/Page/4411 DemandStar https://www.demandstar.com 17
Sealed Proposals Due and Opened	January 11, 2024 at 2:00 p.m.	Submit to: Leon County Schools Purchasing Department Attn: Staci Copppinger, Procurement Officer RFP 241-2024, District-Wide Classification and Compensation Study 3397 W. Tharpe Street Tallahassee, FL 32303* *Also, the location for the Response Opening
Evaluation Team Meeting	January 22, 2024	Leon County Schools Purchasing Department 3397 W. Tharpe Street Tallahassee, FL 32303
Anticipated Date the District will Advertise its Notice of Board Decision	February 20, 2024	District Website https://www.leonschools.net/Page/4411 DemandStar https://www.demandstar.com

Table of Contents

RFP Timeline	2
SECTION 1: Key information	6
1.1 Quick Facts	6
1.2 Proposer Qualifications	6
1.3 How to Contact Us (Procurement Rules and Information)	6
1.4 Developing Your Proposal	7
1.5 Submitting Your Proposal	8
1.6 Proposal Opening	9
1.7 Disposition of Proposals	10
1.8 Changes to the RFP	10
1.9 Protest Procedures	10
SECTION 2: Scope of Work	11
2.1 Background	11
2.2 Procurement Overview	11
2.3 Contract Term	11
2.4 Scope of Work	11
2.5 Board Responsibilities	14
2.6 Consultant Responsibilities	14
2.7 Project Tracking & Progress Reporting	15
The Contractor shall submit weekly progress reports to the District via email that contain:	15
2.8 Billing and Payment	15
2.9 Performance Monitoring	15
SECTION 3: Procurement Rules and Information	17
3.1 Contents and Format of Proposal Submittals	17
3.2 Cost Proposal Submittals	20
3.3 Proposal Evaluation and Criterion	20
3.4 Advertising Notice of Board Decision	24
3.5 No Prior Involvement and Conflicts of Interest	24
3.6 Confidentiality, Proprietary, or Trade Secret Material	24
3.7 Small Business Participation	25
3.8 Local Business Preference	25
4.1 Contract Modifications	26

4.2	Use by Other Public Agencies.....	26
4.3	Travel Expenses.....	26
4.4	E-Verify.....	26
4.5	Subcontracts.....	26
4.6	Background Screening Requirements/Jessica Lunsford Act.....	27
4.7	Insurance.....	28
4.8	Copyrights, Right to Data, Patents, and Royalties.....	29
4.9	Independent Contractor Status.....	29
4.10	Contact with Students.....	29
4.11	Assignment.....	30
4.12	Force Majeure.....	30
4.13	Severability.....	30
4.14	Reservation of Rights.....	30
4.15	Americans with Disabilities Act.....	30
4.16	Employment of District Personnel.....	30
4.17	Legal Requirements.....	30
4.18	Conflict of Law and Controlling Provisions.....	31
4.19	Default.....	31
4.20	Termination.....	31
4.21	Public Records.....	32
4.22	Indemnification.....	32
4.23	Disputes.....	33
4.24	Federal Terms and Conditions.....	33
4.25	Anti-Discrimination.....	35
4.26	Discriminatory Vendor List.....	35
4.27	Public Entity Crime & Convicted Vendor List.....	35
4.28	Scrutinized Companies Certification.....	35
4.29	Vendor Interests.....	36
SECTION 5: Definitions.....		37
Attachment I.....		38
Attachment II.....		39
Required Provisions Certifications.....		39
Attachment III.....		41

Notice of Conflict of Interest	41
Attachment IV	42
Proposer Contact Information.....	42
Attachment V.....	43
Proposer's Reference Form	43
Attachment VI.....	47
Attachment VII.....	48
Subcontracting Form	48
Attachment VIII	49
Drug-Free Workplace Certification	49
Attachment IX.....	50
Attachment X.....	52

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SECTION 1: Key information



1.1 Quick Facts

The School Board of Leon County, Florida (hereinafter referred to as the “District”), is requesting sealed proposals for the provision of a District-Wide Classification and Compensation Study.

- a. The use of capitalization (such as Proposer) denotes words and phrases with special meaning as defined in [Section 5, Definitions](#).
- b. All dates and times reflect Eastern Time (Tallahassee, Florida) unless otherwise indicated.
- c. The District reserves the right to perform, or cause to be performed, the services herein described in any manner it sees fit, including, but not limited to, award of other contracts, utilization of existing State or governmental contracts, public purchasing cooperatives, or to perform the work with its own employees.



1.2 Proposer Qualifications

Proposers shall maintain a permanent place of business and have adequate finances and sufficient personnel to perform the services of this Contract.

- a. Proposer is duly licensed in the State of Florida;
- b. Proposer has a minimum of five (5) years continuous experience successfully providing classification and compensation study services to clients of a similar size and scope as the District, preferably in the public sector; and
- c. Proposer has successfully provided classification and compensation study services to at least three (3) accounts of a similar size and scope as the District, preferably in the public sector.



1.3 How to Contact Us (Procurement Rules and Information)

- a. All questions related to this RFP must be made in writing, via email, to the Procurement Officer listed below. Questions will only be accepted if submitted in writing on or before the date and time specified in the Timeline.
- b. On or about the date referenced in the Timeline, the District will advertise its answers to written questions on the District’s website at <https://www.leonschools.net/Page/4411> and DemandStar at <https://www.demandstar.com/app/agencies/florida/leon-county-schools-purchasing-department/procurement-opportunities/ed9224e2-7a4c-4013-91a2-56aa6ed77478/>.
- c. Between the release of the solicitation, and the end of the 72-hour period following the advertisement of the Notice of Board Decision (the 72-hour period excludes Saturdays, Sundays, and District holidays), Proposers to this RFP, or persons acting on their behalf, may not contact any employee or officer of the Leon County School Board or Superintendent concerning any aspect of this solicitation, except in writing to the Procurement Officer as provided in this solicitation or directed by the District. Violation of this provision may be grounds for rejecting a Proposal.

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- d. Any person requiring special accommodations in responding to this solicitation because of a disability should contact the LCS Purchasing Department at (850) 488-1206 at least five (5) days before any pre-solicitation conference, solicitation opening, or public meeting. Persons who are deaf, hard-of-hearing, deaf-blind, or speech-disabled may contact the LCS Purchasing Office by using the Florida Relay Service at 1-800-955-8771 (TTY/ASCII).

The District's Procurement Officer

Name: Staci Copppinger

Purchasing Department

Leon County Schools

3397 W. Tharpe Street

Tallahassee, FL 32303

Telephone: (850) 488-1206

Email: purchasing@leonschools.net

- e. The Proposer shall not initiate or execute any decision or action arising from any verbal discussion with any District employee related to this RFP. Only written communications from the District's Procurement Officer and formal addendums are considered duly authorized expressions on behalf of the District. Additionally, only written communications from a Proposer are recognized as duly authorized expressions on behalf of the Proposer.

1.4 Developing Your Proposal

- a. This RFP is being issued as part of an open, competitive process and sets out the steps and conditions that apply.
- b. Proposers should take the time to read and understand the RFP. In particular, they should:
 - 1. Review Title XLVIII, [K-20 Education Code](#), within the Florida Statutes.
 - 2. Develop a strong understanding of the District's requirements detailed in [Section 2](#).
 - 3. Ensure their company is on file and in good standing with the Florida Department of State, or provide certification of exemption from this requirement, as required for all entities defined under Chapters 607, 617, or 620, Florida Statutes (F.S.), seeking to do business with the District.
- c. Proposers should prepare a clear and concise Proposal, avoiding complicated jargon, and thoroughly describing their ability to meet the expectations of the District.
- d. Proposers must follow the format and instructions included in this RFP for their Proposal submittal.
- e. Proposals that contain provisions that are contrary to the material requirements of this RFP are not permitted. Including alternate provisions or conditions may result in the Proposal being deemed non-responsive to the solicitation.

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- f. Proposers must use Attachment I (Cost Proposal Form), to submit pricing. Proposers shall not change or substantially alter the form, but fill it out completely, as instructed in Section 3.2 of this RFP.
 - g. Proposers should thoroughly review their Proposal before submission to ensure the Proposal is complete and accurate and it has provided all information requested in the format prescribed in Section 3, Procurement Rules and Information.
 - h. The District is not liable for any costs incurred by a Proposer while responding to this RFP, including the costs associated with attending site visits, oral presentations, or negotiations, as applicable.
 - i. Proposers are expected to submit questions or concerns they have regarding the requirements or terms and conditions of this solicitation during the question and answer phase, per Section 1.3, a.
 - j. The District shall reject any and all Proposals that do not meet the following **pass/fail criteria (also referred to as Mandatory Responsiveness Criteria)**. Any Proposal rejected for failure to meet these requirements will not be evaluated further:
 - 1. Proposer has a minimum of five (5) years continuous experience successfully providing classification and compensation study services to clients of a similar size and scope as the District, preferably in the public sector;
 - 2. The Proposer must confirm that all services to be provided under the Contract will be compliant with all laws, rules, and other authority applicable to providing the services, including, but not limited to, Florida's Open Government laws (Article I, Section 24, Florida Constitution, and Chapter 119, F.S.), Section 218.39, Florida Statutes, (F.S.) as defined in Chapter 10.800, Rules of the Auditor General; and
 - 3. The Proposer shall complete and submit Attachment I, Cost Proposal Form, Attachment II, Required Provisions Certification, Attachment III, Notice of Conflict of Interest, Attachment IV, Proposer Contact Information, and Attachment V, Proposer's Reference Form.



1.5 Submitting Your Proposal

- a. Proposers shall submit their Proposals in a sealed envelope or package with the RFP number and the date and time of the Proposal opening clearly marked on the sealed envelope or packaging. Proposers may submit their Proposals by mail, courier, delivery services (such as FedEx or UPS), or hand-delivery to the location below. **The District will not accept any Proposals submitted via email or fax.**

-
- b. Proposers must mail or otherwise deliver their Proposals to the following address:

Leon County Schools

Purchasing Department

RFP 241-2024, District-Wide Classification and Compensation Study

Attn: Staci Copppinger, Procurement Officer

3397 W. Tharpe Street

Tallahassee, FL 32303

- c. It is the Proposer's responsibility to ensure their Proposal is delivered to the District by the date and time stipulated in the Timeline. The District's clock will stamp Proposals received and shall provide the official time for the Proposal opening. **Late Proposals will not be accepted.**
- d. Submit a Technical Proposal and a Cost Proposal in separately sealed and clearly labeled packages. The Cost Proposal may be shipped along with the Technical Proposal as long as it is sealed separately (such as in a sealed envelope) within the same shipping container and clearly marked.
- e. Submit one (1) signed, original Technical Proposal, five (5) additional hardcopies, and five (5) electronic copies of the Technical Proposal in searchable PDF format on individual electronic storage devices or flash drives (not password protected). The original Technical Proposal will take precedence in the event there is a discrepancy between the original and the hardcopies or electronic copies.
- f. Submit one (1) signed, original Cost Proposal (Attachment I), three (3) additional hard copies and one (1) electronic copy of the Cost Proposal in searchable PDF format on an electronic storage device or flash drive (not password protected). The original Cost Proposal will take precedence in the event there is a discrepancy between the original and the hardcopies or electronic copies.
- g. The signed original Proposals shall be clearly marked as "Original" and the hardcopies shall be numbered one (1) through five (5).
- h. If the Proposer includes information in their Proposal that they believe is and have marked as confidential or trade secret, the Proposer should submit one (1) redacted hard copy and one (1) redacted electronic copy, in searchable PDF format (in addition to the non-redacted version) as outlined in Section 3.6.
- i. Proposers are encouraged to print Proposal documents double-sided and minimize the use of non-recyclable materials.



1.6 Proposal Opening

- a. Proposals are due and will be publicly opened at the time, date, and location specified in the Timeline.
- b. District staff are not responsible for the inadvertent opening of a Proposal that is improperly sealed, addressed, or not correctly identified with the RFP number.
-

-
- c. After the Bid Opening, interested parties may submit a written request to the Procurement Officer for the names of all Proposers.
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1.7 Disposition of Proposals

- a. The District reserves the right to withdraw this RFP at any time and by doing, assumes no liability to any Proposer.
- b. The District reserves the right to reject any Proposals received in response to this RFP.
- c. The District reserves the right to waive Minor Irregularities when doing so would be in the best interest of the District. At its exclusive option, the District may correct Minor Irregularities but is under no obligation to do so.
- d. All documentation produced as part of this Proposal shall become the exclusive property of the District, may not be returned to or removed by the Proposer or its agents, and will become a matter of public record, subject to the provisions of Chapter 119, F.S. Selection or rejection of the Proposal will not affect this right. Should the District reject all Proposals and re-solicit, information submitted in response to this RFP will become a matter of public record as indicated in Section 119.071, F.S. The District shall have the right to use any ideas, adaptations of any ideas, or recommendations presented in any Proposal. The award or rejection of a Proposal shall not affect this right.



1.8 Changes to the RFP

The District will post all addenda and materials relative to this procurement on the District's Purchasing website at <https://www.leonschools.net/Page/4411> and on DemandStar at <https://www.demandstar.com/app/agencies/florida/leon-county-schools-purchasing-department/procurement-opportunities/ed9224e2-7a4c-4013-91a2-56aa6ed77478/>.

Interested parties are responsible for monitoring this site for new or changing information relative to this procurement. Proposers are responsible for ensuring that all addendums have been read and incorporated, as applicable, in their Proposal.



1.9 Protest Procedures

Per Section 120.57(3), F.S., a Notice of Intent to Protest or a Formal Written Protest must be filed with the District's Purchasing Department within the timeframes established in Florida Statutes. Filings may be made physically at 3397 W. Tharpe Street, Tallahassee, Florida 32305, or via email to bidprotests@leonschools.net. Protests must be made in compliance with Rules 28-110.003 and 28-110.004, Florida Administrative Code (F.A.C.). Filings received on a weekend, District holiday, or after 5:00 p.m. will be filed the next business day.

Failure to file a protest within the time prescribed in Section 120.57(3), F.S., or failure to post the bond or other security required by law within the time allowed for filing a bond shall constitute a waiver of proceedings under Chapter 120, F.S.

SECTION 2: Scope of Work

2.1 Background

The District and the School Board are created under Article IX, Section 4, of the Constitution of the State of Florida. The School Board is an independent taxing and reporting authority responsible for the operation, control and supervision of all free public schools within the school district, subject to the Florida K-20 Education Code, Chapters 1000 – 1013, F.S. The Board consists of five (5) elected officials responsible for, among other things, the adoption of policies which govern the operation of District public schools. The elected Superintendent of Schools is responsible for the administration and management of the schools within the applicable parameters of state laws, State Board of Education Rules, and School Board policies.

The District provides a standard, traditional curriculum to a student body of approximately 31,000 students ranging from pre-kindergarten through the 12th grade. LCSB also provides adult education at several facilities during regular and non-school hours. In addition to the standard curriculum, LCSB offers a variety of specialized technical training programs for the higher-grade levels.

2.2 Procurement Overview

It is the desire of the Board to recruit and retain top-quality personnel, and to remain competitive within the local and statewide labor market. The District is seeking proposals from qualified Vendors to conduct a comprehensive position evaluation/audit of all classifications; evaluate if a functional consolidation of positions/classifications to consolidate pay plans into a manageable number of pay schedules is appropriate; evaluate and recommend new classifications where appropriate.

2.3 Contract Term

We anticipate that the Contract will commence within 60 days of award. The expected Contract term and options to renew are:

Description	Time Period
Initial term of the Contract	One (1) year
Optional Contract Renewal Term(s)	One (1) year, or portions thereof
Maximum term of the Contract	Two (2) years

2.4 Scope of Work

The Successful Proposer will be required to provide the following services to include, but not limited to:

- a. Conduct a comprehensive position evaluation/audit of all classifications; evaluate if a functional consolidation of positions/classifications to consolidate pay plans into a manageable number of pay schedules is appropriate; evaluate and recommend new classifications where appropriate; incorporate opportunities for career progression steps within specific classifications, where appropriate.

- b. Recommendation(s) as to whether the pay ranges are appropriate for the classes, both internally and externally and whether they are benchmarked to the geographic labor market with which the Board competes.
- c. Reduce the number of Administrative supplements by rolling them into job description/base salary if appropriate, or even elimination if necessary.
- d. Create/develop or revise job descriptions for all classifications. The proposed system should be sufficiently complex to accomplish its mission, but not so complex as to be burdensome.
- e. Recommendation(s) for implementing any changes to the current compensation strategy.
- f. Provide an implementation plan that is cost effective, fair and equitable across the board, as well as competitive with respect to similar sized public and private employers.
- g. Develop and relate a detailed implementation strategy(s) and cost impact for all proposed recommendations.

2.4.1 Market Compensation Analysis

- a. Conduct an internal comprehensive job evaluation and external comparison for all applicable positions.
- b. Provide a comparison and analysis of salaries and wages of like or similar jobs of comparable public-school districts and state organizations with similar positional or organizational characteristics.
- c. Provide competitive reference points, including, but not limited to those indicated below.
 - 1. Bay County Public Schools, Florida
 - 2. Okaloosa County Public Schools, Florida
 - 3. Santa Rosa County Public Schools, Florida
 - 4. Escambia County Public Schools, Florida
 - 5. Alachua County Public Schools, Florida
 - 6. St. Johns County Public Schools, Florida

2.4.2 Compensation Analysis

- a. Evaluate existing compensation structure and provide change recommendations as appropriate.
- b. Analysis of current pay practices, frequency, position longevity, etc.
- c. Review and evaluate current classification and pay structure and position placement within salary/wage ranges.
- d. Conduct a compressional analysis and examine the equity of pay among the present employees based upon qualifications, experience, responsibilities, and longevity.
- e. Identify any outliers and other recommendations for correction if appropriate.

- f. Provide recommendations on pay delivery processes related to steps and longevity, base wage increases, and maximum/minimum wage increases.
- g. Identify compression areas and recommend resolution strategies.
- h. Provide recommendations for compensation structures/rules to maintain market competitiveness and prevent future compression.

2.4.3 Position Analysis

- a. Conduct a review between the job title and responsibilities.
- b. Provide recommendations relative to the educational background of the employee by position (required or preferred).
- c. Format and process job analysis questionnaires. Review with the project committee and conduct employee meetings.
- d. Review all current job classifications and analyze, document, and validate same for knowledge, skills, abilities, essential functions, education and experience relevance and hierarchical consistency, job definitions, distinguishing characteristics, supervision received and exercised, and special requirements including licensing and certification requirements.
- e. Provide management information papers (MIP's) for supervisors to comment on concerns about pay and/or classifications.
- f. Propose language for new classification descriptions. Propose the hierarchy of positions within the organization to be consistent and competitive with the applicable market.
- g. Review all positions and the job evaluation methodology proposed to allocate positions within a classification system that supports the Board's mission and strategic objectives to include the development of appropriate data collection instruments and the specific process proposed.
- h. Describe the assistance to be provided to the Board employees during the data collection and review phase of the study and include the percentage and/or number of employees who will participate in job analysis interviews.

2.4.4 Compensation Structure Recommendations and Implementation

- a. Develop an implementation strategy and provide plan options for an updated compensation structure. The implementation strategy will include calculated fiscal impact of enacting the plan and all possible alternatives.
- b. Provide an analysis of each position/job description, assigning to an appropriate salary grade to ensure fairness and equity. The Successful Proposer will include recommendations for all positions that are found to be below or above the assigned salary grade.
- c. Provide recommendations for salary placement for newly hired employees.
- d. Provide recommendations for compensating employees who have reached maximum earning potential within their assigned salary grade.
- e. The Successful Proposer will provide recommendations for compensating employees who are promoted from within an equitable, meaningful, manner.

- f. Prepare a plan, and an alternative plan, for the implementation of salary recommendations, including calculation of detailed cost estimates of each alternative. Additionally, a timeline with consideration to order of implementation prioritization will be developed and delivered.

2.4.5 Project Timeline

Provide a project timeline detailing the following major phases:

- a. Job Analysis
- b. Classification description revision/development.
- c. Job class evaluation and report of findings to the project committee.
- d. Determination of relevant labor markets and recommendations to the project committee.
- e. Salary survey.
- f. Comparison of salary and benefits data with School Board data.
- g. Draft final report to include pay and benefit policy and procedure recommendations and initial implementation cost projection.
- h. Final report of finding and recommendations to the project committee.
- i. Presentation to the Board
- j. Staff training.

2.5 Board Responsibilities

The Board will provide the Successful Proposer with the following:

- a. Personnel policies and procedures.
- b. Classifications.
- c. Pay rates and salary schedules.
- d. Job descriptions for all classifications.
- e. Organizational charts for all departments.
- f. Name and classification of all Board employees by department.
- g. Applicable collective bargaining agreements.
- h. Other required materials when requested and available.

2.6 Consultant Responsibilities

The Successful Proposer responsibilities include, but are not limited to:

- a. Provide interim reports to the Board as requested and conduct workshops on the final evaluation and recommendation to ensure adequate communications with the Board on issues that will impact the budget and services rendered.
- b. Provision of own work materials.
- c. Provision of all materials to be completed by Board employees.
- d. Acquisition of all information and materials from other School Boards, governmental agencies, private sector companies, etc. necessary for the completion of the study.

- e. Provide completed classification system, salary schedules and salary analysis of all classifications and cost factors relating to the implementation and maintenance of the program.
- f. Provide written reports of all findings.
- g. Provide statistical data, survey, research materials and other information used in formulating the recommendation(s).
- h. Provide all supporting documentation including questionnaires and interview forms.
- i. Provide on-site training to Human Resource staff and training materials.
- j. Provide a defense of all classifications and pay recommendations in the event any recommendations are challenged by the Boards bargaining units.

2.7 Project Tracking & Progress Reporting

The Contractor shall submit weekly progress reports to the District via email that contain:

- a. Work scheduled for the following week with estimated start dates and times;
- b. Work completed during the week with actual completion dates; and
- c. Unforeseen delays/obstacles, and other comments.

2.8 Billing and Payment

Upon receipt of a complete and correct invoice the Board has five (5) business days to review, verify, approve, and submit the verified invoice to LCS Accounts Payable for processing. The Board shall pay all invoices within 30 days of receiving the proper invoice or the services being completed, verified, and approved, the latter of the two dates. The Board issues approved payments every two (2) weeks. All Contractors must complete the ACH Direct Payment Form located online at <https://www.leonschools.net/Page/1086> within five (5) business days of Contract execution. The Board does not issue checks for vendor payments.

2.9 Performance Monitoring

The District may utilize any or all of the following methodologies in monitoring the Contractor(s) performance under the Contract and in determining compliance with Contract terms and conditions:

- On-site reviews of work performed;
- Documentation/review of timely response to work requests;
- Documentation/review of timely completion of work as assigned; and
- Documentation/review of invoices.

The Contract Manager will provide a written monitoring report to the Successful Proposer within 30 days of a monitoring visit. Non-compliance issues identified by the Contract Manager will be described in detail to provide the Successful Proposer(s) the opportunity for correction, where feasible.

Within 10 calendar days of receipt of the District's written monitoring report the Successful Proposer shall provide a formal Corrective Action Plan (CAP) to the Contract Manager (email acceptable), in response to all noted deficiencies to include responsible individuals and required time frames for achieving compliance. Unless specifically agreed upon in writing by the Contract Manager, time frames for

compliance shall not exceed 30 calendar days from the date of receipt of the monitoring report by the Successful Proposer. CAPs that do not contain all information required shall be rejected by the Contract Manager in writing. The Successful Proposer shall have 15 calendar days from the receipt of such written rejection to submit a revised CAP; this will not increase the required time for achieving compliance. All noted deficiencies shall be corrected within the time frames identified in the CAP, or as amended with prior approval of the District. If deficiencies are not corrected within the approved timeframe, the District will impose a financial consequence of \$100 per day until corrected. The Contract Manager may conduct follow-up monitoring at any time to determine compliance based upon the submitted CAP.

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SECTION 3: Procurement Rules and Information

3.1 Contents and Format of Proposal Submittals

Proposals are to be organized in TABs as directed below. Proposers shall include all the requested information in each TAB, or their Proposal may be deemed non-responsive. Additionally, information included in the incorrect section may not be scored by the District's Evaluation Team.

a. TAB A

Overview

1. Executive Summary/ Letter of Interest

Submit a brief executive summary stating the Proposer's understanding of the nature and scope of the services to be provided and the capability to comply with all terms and conditions of the RFP.

2. Financial Interest

Please include a list of any Board/District employees or officials that have a material financial interest (over 5%) using Attachment III. Please include the employee/official's name, title/position, and the date they filed the required Conflict of Interest Statement with the Leon County Supervisor of Elections before the Proposal Opening.

b. TAB B

Experience and Organization

1. References

Proposers shall provide at least three (3), but not more than five (5), references for whom the Proposer has provided services of similar scope and size to the services identified in this RFP. References should reflect the current or recent experience and must support the experience requirements of this RFP. To qualify as current/recent experience, services described by references shall be ongoing or shall have been completed within the 12 months preceding the issuance date of this RFP.

Each reference shall be completed and signed by the individual offering the reference, and certified by a notary public, using Attachment V, Proposer's Reference Form. The District reserves the right to contact reference sources listed or previous clients not listed in the Proposer's Proposal.

2. Company Profile

- i. State whether the Proposer is a local, regional, or national company.
- ii. Provide a summary of Proposer's background, size, and years in business.
- iii. Provide the location of the office from which this work will be performed and the number of staff and positions employed at that office.
- iv. Describe the types of compensation studies previously and currently performed.

- v. Describe the experience of the staff in performing compensation studies of governmental entities.
- vi. Describe and list any school board experience of the Proposer within the State of Florida and in other states.
- vii. Name of key personnel to include resume outlining formal and continuing professional education.
- viii. Identify the dedicated representative who will be responsible for this project.

3. Narrative Record of Past Experience

As indicated in Section 1.4(j) of this RFP, it is a Mandatory Responsiveness Requirement that the Proposer has a minimum of three (3) years of continuous experience providing compensation analysis services to public agencies of similar scope and size. Details of the Proposer's experience meeting this requirement shall be provided in narrative form and with enough detail for the District to determine its complexity and relevance.

4. Litigation

Provide a statement of any litigation or regulatory action that has been filed or is pending against your firm(s) in the last three (3) years. If an action has been filed, state and describe the litigation or regulatory action filed, and identify the court or agency before which the action was instituted, the applicable case or file number, and the status or disposition for such reported action. If no litigation or regulatory action has been filed against your firm(s), provide a statement to that effect.

c. TAB C

Approach to Service Delivery

- i. Clearly describe, in detail, the approach the Proposer will utilize in providing the requested services described in Section 2.4.
- ii. Indicate the length of time that the Proposer has provided the services described.
- iii. Provide a list of agencies/organizations that the consultant/firm has conducted a compensation study similar to the scope of this RFP and similar in nature to the size of the District.
- iv. Describe the procedures of the Proposer for ensuring quality control and the confidentiality of information contained from clients.
- v. Describe the consultant/firm's experience working in a unionized environment.

- vi. Include materials (surveys or other related documents) your firm proposes to utilize during the process.
- vii. Submit a sample report typical of what you have provided to other public service sector employers.
- viii. Submit any additional information not previously requested which proposer believes would assist the District in the evaluation of Proposer's approach to provide the required services.

d. **TAB D**

Required Forms

Proposers shall complete the following forms:

- a. The completed, notarized Attachment II, Required Provisions Certification, signed by the authorized representative who signs the above-mentioned cover letter;
- b. Completed Application for Vendor Status*, and associated forms (<https://www.leonschools.net/cms/lib/FL01903265/Centricity/Domain/195/FORMS/Application%20for%20Vendor%20Status-ACH%20forms%20FEB%202021.pdf>);
- c. Attachment III, Notice of Conflict of Interest
- d. Attachment IV, Vendor Contact Information
- e. Attachment V, Proposer's Reference Form
- f. Attachment VI, Local Preference Affidavit (if applicable)
- g. Attachment VII, Subcontracting Form (if applicable)
- h. Attachment VIII, Drug-Free Workplace Certification (if applicable)
- i. Attachment IX, Certification Regarding Debarment
- j. Attachment X, Certification Regarding Lobbying

***Please note, if the Vendor is already registered with the District, it does not need to submit another application.**

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3.2 Cost Proposal Submittals

Each Proposer shall complete and submit Attachment I, Cost Proposal Form, indicating pricing for services as detailed. The Cost Proposal Form shall **NOT** be included in the Proposer's Technical Proposal. The Cost Proposal Form shall be provided in a separate, sealed envelope. This envelope may be included in the shipping package with the Proposer's Technical Proposal; however, it must be separately sealed within the package. While factors that contribute to cost may be discussed in the Respondent's Proposal, actual pricing shall only be included in the Cost Proposal. Inclusion of price information in the Technical Proposal may result in finding the Proposal non-responsive.

3.2.1 It is anticipated that the firm/consultant would use staff with a variety of skill and experience levels in providing the services contemplated in Section 2.4, depending upon the type and complexity of the services. Proposer should provide a not-to-exceed price as requested.

3.2.2 Additional Services (if needed). The District may request the use of the firm's staff to provide additional services. All additional payments, fees, and costs will be based on the fee schedule established for the Proposer. Please submit with your response, a schedule of fees that designates the hourly rate/unit rates for each staff member with the name and/or position title specified. The fee schedule may not be deviated from without the prior consent of the authorized representative of the School Board. It is expected that the District would authorize additional services in advance, in writing, on an individual basis. The District would jointly determine with the firm a not-to-exceed price for each project, using the contractually established rates.

3.3 Proposal Evaluation and Criterion

Failure to respond, provide detailed information, or provide requested Proposal elements will result in the reduction of points in the evaluation process. The District will reject any Proposal containing material deviations from the RFP. The District may waive any minor irregularities and technicalities. If only one responsive Proposal is received, the Team may negotiate the best terms and conditions with that sole Proposer or may recommend the rejection of all proposals as permitted by Section 6A-1.012(12)(c), F.A.C. The evaluation process will be conducted as described below. Evaluation of Proposals will be based on an average of the Evaluation Team Member's points (for sections evaluated by the Team).

3.3.1: Responsiveness Determination: Each Proposal will be reviewed by the District's Purchasing Department to determine if the Proposal meets the mandatory responsiveness criteria as listed in Section 1.4(j) of the RFP. Proposals deemed non-responsive will not be further evaluated nor be considered for award. The individual responsible for this portion of the evaluation is not a member of the Evaluation Team.

3.3.2: Cost Evaluation: The District's Purchasing Department will review and assign Cost Points based on the formula below:

Cost Component	Weight
Not to Exceed Total Price*	40 pts
*inclusive of all costs associated to perform and complete requirements of Scope of Services	

For Cost Points, the Vendor submitting the lowest Cost will receive the total points assigned for that component. All other Proposals will receive Cost Points according to the following formula:

$$(N / X) \times \text{Weighted Cost Points Assigned} = Z$$

Where:

N = Lowest Price (per cost component) received by any Proposal

X = Vendor's Proposed Price

Z = Cost Points Awarded

3.3.3: Evaluation Team: This step evaluates the strengths of the companies that have responded to the RFP. The Team will score the Proposals using the evaluation criterion below.

Evaluation Criterion	Maximum Assigned Points
CRITERION 1: Business Experience <ul style="list-style-type: none"> Has the Proposer demonstrated in its Proposal that it has experience in performing the types of services sought with clients similar in size and mission? How well did the Proposer convey their ability to provide services as described in this RFP? Are any issues or concerns identified regarding the Proposer's experience or ability to provide the services sought? 	Excellent 30 Good 22.5 Fair 15 Poor 7.5 Unsatisfactory 0
CRITERION 2: Staffing and Qualifications <ul style="list-style-type: none"> Formal Education Continuing professional education relative to compensation study analysis. Experience in education, private business or government Experience in providing compensation study analysis services 	Excellent 30 Good 22.5 Fair 15 Poor 7.5 Unsatisfactory 0

Evaluation Criterion	Maximum Assigned Points
CRITERION 3: Approach to Service Delivery The approach that the Proposer will use in providing the services <ul style="list-style-type: none"> • Has the Proposer demonstrated in their Proposal an ability to effectively provide quality compensation study analysis services required by this RFP; • How well the Proposer's solution maximizes operational efficiencies and supports the District's goals; • Does the Proposal demonstrate a thorough, effective, and beneficial plan for the services sought through this RFP; • How the Proposer's proposed staffing plan serves the District's needs in terms of quantity and quality of the team members; and • How well does the Proposal demonstrate their understanding of the District's goals to be achieved via this RFP? 	Excellent 30 Good 22.5 Fair 15 Poor 7.5 Unsatisfactory 0
CRITERION 4: Quality of References <ul style="list-style-type: none"> • To what extent does the Proposer's references demonstrate its' ability to provide services under a Contract? • How well do the Vendor's recent clients compare to the size of scope of the services the District is seeking? 	Excellent 30 Good 22.5 Fair 15 Poor 7.5 Unsatisfactory 0
Scored by LCS Purchasing Department	
CRITERION 5: COST POINTS	Points to be assigned per Section 3.3.2
Local Preference (Board Policy 6450) <ul style="list-style-type: none"> • Leon County Vendors will receive 10 pts. • Adjacent County Vendors will receive 5 pts. 	10
Small Business Certification (Board Policy 6325)	5

3.3.4 Score Computation: All scores will be calculated (sections scored by the Team will be averaged per criterion) and combined for a Grand Total Score.

3.3.5 The table below provides scoring guidelines to be used by the District's Evaluation Team members when allocating points:

Score	Score Description
Excellent	Exceeds expectations for effectiveness and responsiveness to the requirement. “Excellent” is defined as a proposal to a specific criterion that is extensive, detailed, exceeding all requirements and objectives of the solicitation, with the high probability of meeting the requirements with little or no risk to the School District. “Excellent” also demonstrates a complete understanding of the requirements, with the approach significantly exceeding performance and/or capability standards, has several exceptional strengths, shows no weaknesses, and will require normal contractor effort and project monitoring.
Good	Above minimum performance, effective and responsive to the requirement. “Good” is defined as a proposal which generally exceeds requirements in minor areas; therefore, has a good probability of meeting the requirements with little risk to the School District. “Good” also demonstrates a good understanding of the requirements, and the approach exceeds the performance or capability standards, with one or more strengths that will benefit the School District. Weaknesses will have little potential to cause a disruption of schedule, an increase in cost, or a degradation of performance. Normal contract effort and project monitoring will be required to overcome any difficulties.
Fair	Minimal acceptable performance standards and responsive to the requirement. “Fair” is defined as a proposal which generally meets the requirements. “Fair” demonstrates acceptable understanding of the requirements and the approach meets the performance or capability standards with no obvious strengths that will benefit the School District. Weaknesses will have the potential to cause a disruption of schedule, an increase in cost, or a degradation of performance. Special contractor emphasis and close monitoring will probably minimize any difficulties of risk.
Poor	Responsive to the requirement but below acceptable standards. “Poor” is defined as a proposal that demonstrates a limited understanding of the requirements, includes minor omissions, and the approach barely meets the performance or capability standards necessary for minimal contract performance. “Poor” demonstrates a misunderstanding of the requirements that may be corrected or resolved through discussions without a complete revision of the Proposal. Weaknesses can potentially cause some disruption of schedule, increase in cost, and/or degradation of performance even with special contractor emphasis and close project monitoring.
Unsatisfactory	Not responsive to requirement. “Unsatisfactory” is defined as a proposal not meeting the requirements without major revisions and proposes an unacceptable risk. “Unsatisfactory” demonstrates a misunderstanding of the requirements; the approach fails to meet performance or capability standard and contains major omissions and inadequate detail to assure the evaluator that the respondent understands the requirement.

3.4 Advertising Notice of Board Decision

A Contract will be awarded to the Responsive and Responsible Vendor(s) who receive the highest Final Score, considering price and other requirements as set forth in Section 3.3. The District reserves the right to award one (1) or more Contracts, in whole, or for part, for the services sought in this RFP. The District reserves the right to accept or reject any and all offers, or separable portions, and to waive any Minor Irregularity, technicality, or omission if the District determines doing so will serve the best interest of the Board.

As in any competitive solicitation, the Board shall advertise a public notice of Board Decision when the Board has decided on the outcome of the solicitation including, but not limited to, a decision to award a Contract(s), reject all Proposals, or to cancel/withdraw the RFP.

The Notice of Board Decision will be advertised on or about the date shown in the Timeline and will remain posted for a period of 72 hours (Saturdays, Sundays, and District holidays shall be excluded in the computation of the 72-hour period).

3.5 No Prior Involvement and Conflicts of Interest

Any Proposer who participated through decision, approval, disapproval, recommendation, preparation of any part of the purchase, influenced the content of the solicitation, rendered advice, investigated, audited, or served in any other advisory capacity, is ineligible to participate in this solicitation.

Additionally, no Proposer shall compensate in any manner, directly or indirectly, any officer, agent, or employee of the District for any act or service which he/she may do, or perform for, or on behalf of, any officer, agent, or employee of the Proposer. No officer, agent, or employee of the District or Board shall have any interest, directly or indirectly, in any Contract or purchase made, or authorized to be made, by anyone for, or on behalf of, the Board. The Proposer shall have no interest, and shall not acquire any interest that shall conflict in any manner or degree with the performance of the services required under this RFP.

Certification and acceptance of this provision is incorporated in Attachment II, Required Provisions Certification.

3.6 Confidentiality, Proprietary, or Trade Secret Material

The District takes its public records responsibilities as provided under Chapter 119, F.S., and Article I, Section 24 of the Florida Constitution, very seriously. If the Proposer considers any portion of the documents, data, or records submitted in response to this solicitation to be confidential, trade secret, or otherwise not subject to disclosure under Chapter 119, F.S., the Florida Constitution, or other authority, the Proposer must also simultaneously provide the District with a separate redacted copy of its Proposal and briefly describe in writing the grounds for claiming exemption from the public records law, including the specific statutory citation for such exemption. This redacted copy shall contain the District's solicitation name, number, and the name of the Proposer on the cover, and shall be clearly titled "Redacted Copy." The redacted copy shall be provided to the District at the same time the Proposer submits its Proposal to the solicitation, and must only exclude or redact those exact portions which are claimed confidential, proprietary, or trade secret. The Proposer shall be responsible for defending its determination that the redacted portions of its response are confidential, trade secret, or otherwise not subject to disclosure. Further, the Proposer shall protect, defend, and indemnify the District for any and

all claims arising from or relating to Proposer's determination that the redacted portions of its response are confidential, proprietary, trade secret, or otherwise not subject to disclosure. If the Proposer fails to submit a Redacted Copy with its Proposal, the District is authorized to produce the entire documents, data, or records submitted by the Proposer in answer to a public record request for these records. In no event shall the District, Board, or any of its employees or agents, be liable for disclosing, or otherwise failing to protect, the confidentiality of information submitted in response to this solicitation.

3.7 Small Business Participation

This RFP, in the evaluation phase, is subject to the small business development provisions specified in Board Policy 6325. If the Proposer is considering using subcontractors, the District highly encourages the use of small business vendors.

3.8 Local Business Preference

This RFP, in the evaluation phase, is subject to the local preference provisions specified in Board Policy 6450. If the Proposer is considering using subcontractors, the District highly encourages the use of local business vendors.

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SECTION 4: Contract Terms and Conditions

4.1 Contract Modifications

During the term of the Contract, the District may unilaterally require changes (altering, adding to, or deducting from the specifications) provided such changes are within the general scope of this solicitation. The Contractor may request an equitable adjustment in the price(s) or delivery date(s) if the change affects the cost or time of performance. Such equitable adjustments require a formal contract amendment. The District shall provide written notice to the Bidder 30 days in advance of any Department-required changes to the technical specifications and/or scope of service, which affects the Bidder's ability to provide the service as specified herein. Any changes, other than purely administrative changes, will require a written change order or formal Contract amendment.

4.2 Use by Other Public Agencies

Pursuant to their own governing laws, and subject to the agreement of the Contractor, other entities may be permitted to make purchases at the terms and conditions contained herein. Any such purchases are independent of the agreement between the District and Contractor, and the District shall not be a party to any transaction between the Contractor and any other purchaser.

The District hereby notifies interested parties that the Florida Department of Management Services purchasing agreements and state term contracts have been reviewed for the goods and services contemplated by this solicitation and the District has determined conducting our own solicitation is in our best interest.

4.3 Travel Expenses

The District shall not be responsible for the payment of any travel expenses incurred by Proposers due to this RFP or Contract.

4.4 E-Verify

Per Executive Order 11-116, "The provider agrees to utilize the U.S. Department of Homeland Security's E-Verify system, <https://e-verify.gov/employers>, to verify the employment eligibility of all new employees hired during the contract term by the Provider. The Provider shall also include a requirement in subcontracts that the subcontractor shall utilize the E-Verify system to verify the employment eligibility of all new employees hired by the subcontractor during the contract term." Contractors meeting the terms and conditions of the E-Verify System are deemed to comply with this provision.

Beginning January 1, 2021, every public employer, contractor, and subcontractor shall register with and use the E-Verify system to verify the work authorization status of all newly hired employees. A public employer, contractor, or subcontractor shall not enter into a contract unless each party to the contract registers with and uses the E-Verify system per Section 448.095, F.S.

4.5 Subcontracts

The Contractor may, only with the prior written consent of the District, enter into written subcontracts for the delivery or performance of services as indicated in this RFP. Anticipated subcontract agreements known at the time of Proposal submission must be identified in the submitted Proposal using Attachment VII, Subcontracting Form. If a subcontract has been identified at the time of submission, a copy of the

proposed subcontract must be submitted to the District. No subcontract, which the Contractor enters into concerning the performance of any of its functions under the Contract, shall in any way relieve the Contractor of any responsibility for the performance of its duties. All subcontractors, regardless of function, providing services on District property, shall comply with the District's security requirements, as defined by the Board, including background checks, compliance with Board Policy 2.021, the Jessica Lunsford Act, and all other Contract requirements. All payments to subcontractors shall be made by the Contractor.

If a subcontractor is utilized by the Contractor, the Contractor shall pay the subcontractor within seven (7) working days after receipt of full or partial payments from the District, per Section 287.0585, F.S. It is understood, and agreed that the District shall not be liable to any subcontractor for any expenses or liabilities incurred under the subcontract and that the Contractor shall be solely liable to the subcontractor for all expenses and liabilities under the Contract. Failure by the Contractor to pay the subcontractor within seven (7) working days will result in a penalty to be paid by the Prime Contractor to the subcontractor in the amount of one-half (½) of one percent (1%) of the amount due per day from the expiration of the period allowed herein for payment. Such penalty shall be in addition to actual payments owed and shall not exceed fifteen percent (15%) of the outstanding balance due.

4.6 Background Screening Requirements/Jessica Lunsford Act

Florida Statutes contain certain fingerprinting and/or screening requirements pertaining to all persons or entities entering into contracts with Schools, School Boards, School Districts, and Charter Schools who may have personnel who will be on school grounds when students may be present. Any individual who fails to meet the statutory requirements shall not be allowed on school grounds. Failure to comply with the statutory requirements will be considered a material default of this Contract.

The Contractor shall bear all costs associated with background screening.

District Contact

Donald Kimbler

Leon County Schools Safety & Security

Monday-Friday (excluding District holidays), 8:00 a.m. – 5:00 p.m.

Phone: (850) 487-7293

Email: kimblerd@leonschools.net

4.7 Insurance

Below are the minimum insurance requirements the Contractor(s) must maintain:

- 4.7.1 General Liability: Limits not less than \$1,000,000 per occurrence for Bodily Injury/ Property Damage; \$1,000,000 General Aggregate. Limits not less than \$1,000,000 for Products/Completed Operations Aggregate.
- 4.7.2 Professional Liability/Technology Errors & Omissions: Limit not less than \$1,000,000 per occurrence covering services provided under this Contract.
- 4.7.3 Workers Compensation: Florida Statutory limits in accordance with Chapter 440, F.S.; Employer's Liability limits not less than \$100,000/\$100,000/\$500,000 (each accident/disease-each employee/disease-policy limit).
- 4.7.4 Auto Liability: Owned, Non-Owned and Hired Auto Liability with Bodily Injury and Property Damage limits of not less than \$1,000,000 Combined Single Limit. If Contractor does not own any vehicles, hired and non-owned automobile liability coverage in the amount of \$1,000,000 shall be accepted. In addition, an affidavit signed by the Contractor must be furnished to the District indicating the following: *"(Contractor Name) does not own any vehicles. In the event insured acquires any vehicles throughout the term of this agreement, insured agrees to provide proof of "Any Auto" coverage effective the date of acquisition"*.
- 4.7.5 Acceptability of Insurance Carriers: The insurance policies shall be issued by companies qualified to do business in the State of Florida. The insurance companies must be rated at least A-VI by AM Best or Aa3 by Moody's Investor Service.
- 4.7.6 Verification of Coverage: Proof of insurance must be furnished within fifteen (15) days of award of the contract.
- 4.7.7 Required Conditions: Liability policies must contain the following provisions. In addition, the following wording must be included on the Certificate of Insurance:

The School Board of Leon County, Florida, its members, officers, employees and agents are added as additional insured.

All liability policies are primary of all other valid and collectable coverage maintained by the School Board of Leon County, Florida.

Certificate Holder: The School Board of Leon County, Florida, 2757 W. Pensacola St. Tallahassee, FL 32303

The School Board of Leon County, Florida reserves the right to review, reject or accept any required policies of insurance, including limits, coverage's or endorsements, herein throughout the term of this agreement.
- 4.7.8 Cancellation of Insurance: Vendors are prohibited from providing services under this Agreement with LCSB without the minimum required insurance coverage and must notify LCSB within two business days if required insurance is cancelled.

4.8 Copyrights, Right to Data, Patents, and Royalties

Where contracted activities produce original writing, sound recordings, pictorial reproductions, drawings, or other graphic representation and works of any similar nature, the District has the right to use, duplicate and disclose such materials in whole or in part, in any manner, for any purpose whatsoever and to have others acting on behalf of the District to do so.

The District shall have unlimited rights to use, disclose or duplicate, for any purpose whatsoever, all information and data developed, derived, documented, or furnished by the Proposer. All computer programs and other documentation produced as part of the Contract shall become the exclusive property of the District, and may not be copied or removed by any employee of the Contractor's without express written permission of the District.

The Contractor, without exception, shall indemnify, and save harmless the District, the Board, and its employees from liability of any nature or kind, including costs and expenses for or on account of any copyrighted, patented, or unpatented invention, process, or article manufactured or supplied by the Vendor. The Vendor has no liability when such claim is solely and exclusively due to the combination, operation, or use of any article supplied hereunder with equipment or data not supplied by the Contractor or is based solely and exclusively upon the District's alteration of the article. The District will provide prompt written notification of a claim of copyright or patent infringement, and will afford the Contractor the full opportunity to defend the action, and control the defense of such claim.

Further, if such a claim is made or is pending, the Contractor may, at its option and expense, procure for the District the right to continue the use of, replace, or modify the article to render it non-infringing. If none of the alternatives are reasonably available, the District agrees to return the article to the Contractor upon its request and receive reimbursement, fees, and costs, if any, as may be determined by a court of competent jurisdiction. If the Contractor uses any design, device, or materials covered by letter, patent or copyright, it is mutually agreed and understood without exception that the Contract prices shall include all royalties or costs arising from the use of such design, device, or materials in any way involved in the work to be performed hereunder.

4.9 Independent Contractor Status

The Successful Proposer shall be considered an independent contractor in the performance of its duties, and responsibilities. The District shall neither have nor exercise any control or direction over the methods by which the Contractor shall perform its work and functions other than as provided herein. Nothing is intended to, nor shall be deemed to constitute, a partnership or a joint venture with the Contractor(s).

4.10 Contact with Students

No Contractor staff, subcontractors, suppliers, or anyone involved in any manner with providing goods or services under the Contract(s) shall have direct or indirect contact with students at school sites. A violation of this provision shall result in immediate termination of the offender and issuance of a trespass notice from the Board. The Contractor shall be responsible for ensuring compliance by all employees,

independent Contractors, subcontractors, or other persons involved in any manner with providing goods or services under the Contract(s).

4.11 Assignment

The Contractor shall not assign its responsibilities or interests to another party without the prior written approval of the District. The Board shall, at all times, be entitled to assign or transfer its rights, duties, and obligations to another governmental entity of the State of Florida, upon giving written notice to the Contractor.

4.12 Force Majeure

Neither party shall be liable for loss or damage suffered as a result of any delay or failure in performance under the Contract or interruption of performance resulting directly or indirectly from acts of God, fire, explosions, earthquakes, floods, water, wind, lightning, civil or military authority, acts of public enemy, war, riots, civil disturbances, insurrections, strikes, or labor disputes.

4.13 Severability

The invalidity or unenforceability of any particular provision shall not affect the other provisions hereof and shall be construed in all respects as if such invalid or unenforceable provision was omitted, so long as the material purposes can still be determined and effectuated.

4.14 Reservation of Rights

The District reserves the exclusive right to make certain determinations regarding the service requirements. The absence of the District setting forth a specific reservation of rights does not mean that any provision regarding the services to be performed is subject to mutual agreement. The District reserves the right to make any and all determinations exclusively which it deems are necessary to protect the best interests of the District and the health, safety, and welfare of the District's employees, and of the general public which is served by the Board, either directly or indirectly, through these services.

4.15 Americans with Disabilities Act

The Proposer shall comply with the Americans with Disabilities Act (ADA). In the event of the Proposer's noncompliance with the non-discrimination clauses, the ADA, or with any other such rules, regulations, or orders, the Contract may be cancelled, terminated, or suspended in whole or in part, and the Proposer may be declared ineligible for further contracts.

4.16 Employment of District Personnel

The Contractor shall not knowingly engage, employ or utilize, on a full-time, part-time, or any other basis during the term of the Contract, any current or former employee of the District where such employment conflicts with Section 112.3185, F.S.

4.17 Legal Requirements

The applicable provisions of all federal, state, county, and local laws, and all ordinances, rules, and regulations shall govern development, submittal, and evaluation of all Proposals received in response to this RFP and shall govern any and all claims and disputes which may arise between a person(s) submitting a Proposal hereto and the Leon County School Board, by and through its officers, employees and

authorized representatives, or any other person, natural or otherwise; and lack of knowledge by any Contractor shall not constitute a cognizable defence against the legal effect thereof.

4.18 Conflict of Law and Controlling Provisions

The Contract, plus any conflict of law issue, shall be governed by the laws of the State of Florida. The venue for any legal proceedings will be Leon County, Florida.

4.19 Default

If the awarded Proposer should breach the Contract(s) awarded, the Board reserves the right to seek all remedies in law and/or in equity.

4.20 Termination

4.20.1 Termination at Will

The Contract may be terminated by the District upon no less than 30 calendar days' notice and by the Contractor upon no less than 90 calendar days' notice, without cause, unless a lesser time is mutually agreed upon by both parties. Notice shall be delivered by certified mail (return receipt requested), by another method of delivery whereby an original signature is obtained, or in-person with proof of delivery.

4.20.2 Termination for Cause

Performance issues will be handled per Section 2.9 of the RFP. In the event the Contractor's performance issues are not remedied or are so egregious as to cause damage to life, safety, or property, the District may terminate the Contract upon 24 hours' written notice to the Contractor. Notice shall be delivered by certified mail (return receipt requested), in-person with proof of delivery, or by another method of delivery whereby an original signature is obtained.

4.20.3 Termination for Unauthorized Employment

Violation of the provisions of Section 274A of the Immigration and Nationality Act shall be grounds for unilateral cancellation of the Contract.

4.20.4 Termination for Lack of Funds

In the event the funds to finance this Contract become unavailable, the District may terminate the Contract upon no less than 24 hours' notice, in writing, to the Contractor. Notice shall be delivered by certified mail (return receipt requested), in-person with proof of delivery, or by another method of delivery whereby an original signature is obtained. The District shall be the final authority as to the availability of funds.

4.20.5 Contract Termination Requirements

If at any time, the Contract is cancelled, terminated, or otherwise expires, and a Contract is subsequently executed with a contractor other than the Contractor or service delivery is provided by the District, the Contractor has the affirmative obligation to assist in the smooth transition of Contract services to the subsequent provider. This includes, but is not limited to, the timely provision of all Contract-related documents, information, and reports, not otherwise protected from disclosure by law to the replacing party.

4.21 Public Records

To the extent that information is utilized in the performance of the Contract(s) or generated as a result of it, and to the extent that information meets the definition of “public record,” as defined in Section 119.011(12), F.S., said information is recognized by the parties to be a public record and, absent a provision of law or administrative rule or regulation requiring otherwise, shall be made available for inspection and copying by any person upon request as provided in Chapter 119, F.S. The Contractor agrees to (a) keep and maintain public records required to perform the service; (b) upon request from the District’s custodian of public records, provide the District with a copy of the requested records or allow the records to be inspected or copied within a reasonable time at a cost that does not exceed the cost provided in Chapter 119, F.S., or as otherwise provided by law; (c) ensure that public records that are exempt or confidential and exempt from public records disclosure requirements are not disclosed except as authorized by law for the duration of the Contract term and following completion of the Contract if the Contractor does not transfer the records to the District; and (d) upon completion of the Contract, transfer, at no cost, to the District all public records in possession of the Contractor or keep and maintain public records required by the District to perform the service. If the Contractor transfers all public records to the District upon completion of the contract, the Contractor shall destroy any duplicate public records that are exempt or confidential and exempt from public records disclosure requirements. If the Contractor keeps and maintains public records upon completion of the Contract, the Contractor shall meet all applicable requirements for retaining public records.

All records stored electronically must be provided to the District, upon request from the District’s custodian of public records or Contract Manager, in a format that is compatible with the information technology systems of the District. Unless a greater retention period is required by state or federal law, all documents pertaining to the program contemplated by this RFP shall be retained by the Proposer for seven (7) years after the termination of the resulting contract or longer as may be required by any renewal or extension of the Contract. The District may unilaterally cancel the Contract for refusal by the Proposer to allow public access to all documents, papers, letters, or other material made or received by the Proposer in conjunction with the Contract unless the records are exempt from Section 24(a) of Art. I of the State Constitution and either Sections 119.07(1), or 119.071, F.S.

IF THE CONTRACTOR HAS QUESTIONS REGARDING THE APPLICATION OF CHAPTER 119, FLORIDA STATUTES, TO CONTRACTOR’S DUTY TO PROVIDE PUBLIC RECORDS RELATING TO THIS AGREEMENT, CONTACT THE CUSTODIAN OF PUBLIC RECORDS, JULIE JERNIGAN, AT jerniganj@leonschools.net, (850)487-7363, 520 S. Appleyard Dr., Tallahassee, FL 32304.

4.22 Indemnification

The Contractor shall be liable and agrees to be liable for, and shall indemnify, defend, and hold the District, Board, its employees, agents, officers, heirs, and assignees harmless from any and all claims, suits,

judgments, or damages including court costs and attorney's fees arising out of intentional acts, negligence, or omissions by the Contractor, or its employees or agents, in the course of the operations of the Contract, including any claims or actions brought under Title 42 USC §1983, the Civil Rights Act.

4.23 Disputes

Any dispute concerning the performance of the terms of the Contract shall be resolved informally by the Contract Manager. Any dispute that cannot be resolved informally shall be reduced to writing and delivered to the District's Assistant Superintendent of Business Services or designee. The District's Assistant Superintendent of Business Services, or designee, shall decide the dispute, reduce the decision to writing, and deliver a copy to the parties, the Contract Managers, and the District's Contract Administrator.

4.24 Federal Terms and Conditions

For any solicitation that involves, receives or utilizes Federal funding, the following terms and conditions shall be considered a part of the solicitation and resulting Contract and the Vendor accepts and acknowledges that it is and will continue to be in compliance with said terms and conditions for the term of the awarded Contract:

- a. Equal Employment Opportunity (2 CFR Part 200.326(C)): All vendors, contractors, and subcontractors must comply with Executive Order 11246, entitled "Equal Employment Opportunity" as amended by Executive Order 11375, implementing regulations at 41 CFR Part 60. Applies to all construction contracts that meet the definition of "federally assisted construction contract" in 41 CFR Part 60-1.3.
- b. Copeland "Anti-Kickback" Act (2 CFR Part 200.326(D)): All vendors, contractors, and subcontractors must comply with the Copeland "Anti-Kickback" Act (40 U.S.C. 3145) as supplemented in Department of Labor regulations (29 CFR part 3). Applies to all contracts and sub grants for construction or repair.
- c. Davis-Bacon Act (2 CFR Part 200.326(D)): All vendors, contractors, and subcontractors must comply with the Davis-Bacon Act (40 U.S.C. 3141-3144 and 3146-3148) as supplemented by Department of Labor regulations (29 CFR part 5). Applies to all prime construction contracts in excess of \$2,000 awarded by the District and sub grantees when required by Federal grant program legislation.
- d. Contract Work Hours & Safety Standards Act (2 CFR Part 200.326(E)): All vendors, contractors, and subcontractors must comply with 40 U.S.C. 3702 and 3704 of the Contract Work Hours and Safety Standards Act (40 U.S.C. 3701-3708) as supplemented by Department of Labor regulations (29 CFR part 5). Applies to all applicable contracts awarded by the District and sub grantees in excess of \$100,000 that involve the employment of mechanics or laborers.
- e. Access to Records (2 CFR Part 200.336): All vendors, contractors, and subcontractors shall give access to the School Board of Leon County, the appropriate Federal agency, Inspectors General, the Comptroller General of the United States, or any of their duly authorized representatives to any books, documents, papers and records of the vendor which is directly pertinent to this specific solicitation for the purpose of making audit, examination, excerpts and transcripts.

- f. Rights to Inventions Made Under a Contract or Agreement (2 CFR Part 200.326 (F)): The recipient or subrecipient must comply with the requirements of 37 CFR Part 401 and any implementing regulations issued by the awarding agency. Applies to Federal awards meeting the definition of “funding agreement” under 37 CFR §401.2(a) and the recipient or subrecipient wishes to enter into a contract with a small business Contractor or non-profit organization.
- g. Clean Air Act (2 CFR 200.326(G)): All vendors, contractors, and subcontractors must comply with all applicable standards, orders or regulations issued pursuant to the Clean Air Act (42 U.S.C. 7401-7671q), and the Federal Water pollution Control Act as amended (33 U.S.C. 1251-1387). Applies to contracts, subcontracts and sub grants for amounts in excess of \$150,000.
- h. Energy Efficiency (2 CFR 200.326(H)): All vendors, contractors, and subcontractors must comply with mandatory standards and policies relating to energy efficiency which are contained in the state energy conservation plan issued in compliance with the Energy Policy and Conservation Act (42 U.S.C. 6201).
- i. Federal Debarment Certification (2 CFR Part 200.326(I)): Certification regarding debarment, suspension, ineligibility, and voluntary exclusion as required by Executive Orders 12549 and 12689, Debarment and Suspension; and in accordance with 2 CFR Part 180, Section 300.
 - 1. The prospective lower tier participant certifies, by submission and signature of this Proposal, that neither it, nor its principals, its agents or its representatives are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any Federal department or agency.
 - 2. Where the prospective lower tier participant is unable to certify to any of the statements in this certification, such prospective participant shall attach an explanation to this Proposal.
- j. Anti-Lobbying Certification (2 CFR Part 220.326(J)): Certification regarding use of Federal funds as required by Byrd Anti-Lobbying Amendment 31 U.S.C. 1352. This provision applies to varied at or above \$100,000.
 - 1. The Contractor certifies, by submission and signature of their Proposal, that during the term and after the awarded term of all contracts resulting from this procurement, it is in compliance with all applicable provisions of the Byrd Anti-Lobbying Amendment 31 U.S.C. 1352, including that it will not and has not used Federal appropriated funds to pay any person or organization for influencing or attempting to influence an officer or employee of any agency, a member of Congress, officer or employee of Congress or an employee of a member of Congress in connection with obtaining any Federal contract, grant or any other award covered by 31 U.S.C. 1352.
 - 2. Where funds other than Federal appropriated funds are used for such purpose in connection with obtaining any Federal award, the Contractor must disclose same.
- k. Procurement of recovered materials (2 CFR §200.322): The non-Federal entity that is a state agency or agency of a political subdivision of a state and its contractors must comply with section 6002 of the Solid Waste Disposal Act, as amended by the Resource Conservation and Recovery Act. Applies

to items where the purchase price of the item exceeds \$10,000 or the value of the quantity acquired during the preceding fiscal year exceeded \$10,000.

- I. Records Retention: (2 CFR §200.333): Financial records, supporting documents, statistical records and all other non-Federal entity records pertinent to a Federal award must be retained for a period of three years from the date of submission of the quarterly or annual financial report, respectively, as reported to the Federal awarding agency or pass-through entity in the case of a subrecipient.

4.25 Anti-Discrimination

No person shall, on the basis of sex (including transgender, gender nonconforming, and gender identity), marital status, sexual orientation, race, religion, ethnicity, national origin, age, color, pregnancy, disability, military status, or genetic information be excluded from participation in, be denied the proceeds or benefits of, or be otherwise subjected to, discrimination in the performance of this Contract.

4.26 Discriminatory Vendor List

Per the provisions of 287.134(2)(a), F.S. "An entity or affiliate who has been placed on the discriminatory vendor list may not submit a bid on a contract to provide any goods or services to a public entity, may not submit a bid on a contract with a public entity for the construction or repair of a public building or public work, may not submit bids on leases of real property to a public entity, may not be awarded or perform work as a contractor, supplier, subcontractor, or consultant under a contract with any public entity, and may not transact business with any public entity." The Vendor certifies, by submission and signature of their Proposal, that neither the Proposer, nor its principal Vendor, agent or representative is presently on the discriminatory vendor list, or otherwise precluded by Section 287.134, F.S. from participating in this Contract.

4.27 Public Entity Crime & Convicted Vendor List

Per the provisions of 287.133 (2)(a), F.S. "a person or affiliate who has been placed on the convicted vendor list following a conviction for a public entity crime may not submit a bid, proposal or reply on a contract to provide any goods or services to a public entity, may not submit a bid, proposal or reply on a contract with a public entity for the construction or repair of a public building or public work, may not submit bids, proposals or replies on leases of real property to a public entity, may not be awarded or perform work as a contractor, supplier, subcontractor, or consultant under a contract with any public entity, and may not transact business with any public entity in excess of the threshold amount provided in Florida Statute 287.017 for CATEGORY TWO for a period of 36 months from the date of being placed on the convicted vendor list. The Vendor certifies, by submission and signature of their Proposal, that neither the Proposer, nor its principal, agent, or representative is presently debarred, suspended, proposed for debarment, declared ineligible, voluntarily excluded from participation in this transaction or otherwise precluded by Section 287.133, F.S. from participating in this Contract.

4.28 Scrutinized Companies Certification

The Proposer certifies they are not listed on the Scrutinized Companies that Boycott Israel List, created under Section 215.4725, F.S., and they are not currently engaged in a boycott of Israel. If the Contract exceeds \$1,000,000 in total (not including renewal years), the Proposer certifies that it is not listed on either the Scrutinized Companies with Activities in Sudan List, or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List created under Sections 215.473 and 215.4725, F.S., and further

certifies they are not engaged in business operations in Cuba or Syria as stated in Section 287.135(2)(b)2, F.S. Per Sections 287.135(5) and 287.135(3), F.S., the Proposer agrees the Board may immediately terminate the Contract for cause if the Proposer is found to have submitted a false certification or if the Proposer is placed on the Scrutinized Companies with Activities in Sudan List, the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List, the Scrutinized Companies that Boycott Israel List, or is engaged in a boycott of Israel, or has engaged in business operations in Cuba or Syria during the term of the Contract. Any company that submits a Proposal for a contract or upon execution or renewal of a contract with an agency or local governmental entity for goods or services of any amount must certify that the company is not participating in a boycott of Israel.

4.29 Vendor Interests

Per Section 287.05701, F.S., the Board will not consider a Vendor's social, political, or ideological interests when determining if a vendor is considered responsible. Nor will the Board provide a preference based on a vendor's social, political, or ideological beliefs. The Board will not request nor shall a Respondent be expected to provide documentation of its social, political, or ideological interests or those of its employees.

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SECTION 5: Definitions

In this RFP, the following words and expressions have the definitions below unless the context otherwise clearly leads to a different interpretation.

Adjacent County	Any private independent vendor whose county abuts Leon County and has been licensed at least six (6) months preceding the bid or proposal opening, as required by local, State, and Federal law, to provide the goods and services to be purchased.
Business Day	Any weekday in Florida, excluding Saturdays, Sundays, and District-observed holidays.
Contract	The written agreement entered by the Board and Contractor(s) resulting from the award of this solicitation for the delivery of the goods or services described herein.
Contract Manager	The District representative, or their designee, whose responsible for oversight of the resulting Contract, including performance monitoring and certification of invoices for payment.
District/Board (LCSB)	Leon County School District, with the Leon County School Board serving as the Governing Board and contracting entity
Mandatory Responsiveness Requirements	Terms, conditions, and requirements that must be met by the Proposer to be considered responsive to this solicitation.
Material Deviation(s)	A deviation which, in the District's sole discretion, is not in substantial accordance with the requirements herein, provides a significant competitive advantage to one Proposer over other Proposers, has a potentially substantial effect on the quantity or quality of items proposed, services proposed, or cost to the District.
Minor Irregularity	A variation from the requirements herein that does not give the Proposer a substantial competitive advantage or benefit not enjoyed by other Proposers and does not adversely impact the interests of the District.
Proposer	A legally qualified corporation, partnership, or other business entity that submits a Proposal to the District in response to this RFP. This term differs from suppliers, which refers to the marketplace at large.
Responsible Proposer	A Proposer who can fully perform all aspects of the Contract Requirements and has the integrity and reliability to ensure good faith performance.
Responsive Proposal	A Proposal submitted by a Responsible Proposer which conforms to all material aspects of this RFP.
Subcontract	An agreement between the Contractor and any other person or organization, in which that person or organization agrees to perform any duties on the Contractor's behalf under the Contract. The Successful Proposer is not relieved of its duties under the Contract when it enters a Subcontract.
Successful Proposer(s) or Contractor	The Proposer(s) who is awarded the Contract(s) to deliver the goods or provide the services sought in this RFP.

Attachment I
Cost Proposal Form

RFP No. 241-2024 District-Wide Classification and Compensation Study

Rates shall be inclusive of all expenses including travel, supplies, equipment, training, overhead and profit.

Description	
Not-to-exceed total price (inclusive of all costs associated to perform and complete requirements of Scope of Services)	\$ _____
Fee Schedule for Additional Services (Not considered in contract award)	
Position Title	Hourly Rate
	\$
	\$
	\$
	\$
	\$

Company Name

FEIN

Authorized Representative Name (Printed)

Authorized Representative Title

Authorized Representative Signature

Date

Attachment II

Required Provisions Certifications

1. Business/Corporate Experience

This is to certify that the Proposer:

- a. Is duly licensed in the State of Florida;
- b. Has a minimum of five (5) years continuous experience successfully providing classification and compensation study services to clients of a similar size and scope as the District, preferably in the public sector; and
- c. Has successfully provided classification and compensation study services to at least three (3) accounts of a similar size and scope as the District, preferably in the public sector.

2. Prime Vendor

This is to certify that the Successful Proposer will act as the Prime Contractor to the District for all services provided under the Contract(s).

3. Meets Legal Requirements

This is to certify that the Proposer's Proposal and all services provided under the Contract will be compliant with all laws, rules, and other authority applicable to providing the services, including, but not limited to, Florida's Open Government laws (Article I, Section 24, Florida Constitution, Chapter 119, F.S.).

4. Financial Disclosure

This is to certify that the Proposer has disclosed in their Proposal all suspensions, revocations, bankruptcies, judgments, or liens in the last five (5) years.

5. Federal Debarment

This is to certify that neither the Proposer, nor its principles, is currently disbarred, suspended, proposed for disbarment, declared ineligible, or voluntarily excluded from participation in this solicitation by any Federal department or agency.

6. Conflict of Interest

Per Section 1001.42(12)(i), F.S., this certifies that no member of the Leon County School Board or the Superintendent has any financial interest in the Proposer whatsoever.

7. Statement of No Inducement

This is to certify that no attempt has been made or will be made by the Proposer to induce any other person or Contractor to submit or not to submit a Proposal with regards to this RFP. Furthermore, this is to certify that the Proposal contained herein is submitted in good faith and not subject to any agreement or discussion with, or inducement from, any Contractor or person to submit a complementary or other non-competitive Proposal.

8. Statement of Non-Disclosure

This is to certify that none of the contents of this Proposal have been disclosed before award, directly or indirectly, to any other Proposer or competitor.

9. Statement of Non-Collusion

This is to certify that the proposed costs in this Proposal have been arrived at independently, without consultation, communications, or agreement as to any matter relating to such costs with any other Proposer or with any competitor, and not to restrict competition.

10. Scrutinized Companies Certification

The Proposer certifies they are not listed on the Scrutinized Companies that Boycott Israel List, created under Section 215.4725, F.S., and they are not currently engaged in a boycott of Israel. If the resulting Contract exceeds \$1,000,000.00 in total, not including renewal years, the Proposer certifies that they are not listed on either the Scrutinized Companies with Activities in Sudan List, or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List created under Sections 215.473, F.S., and 215.4725, F.S., and further certifies they are not engaged in business operations in Cuba or Syria. In compliance with Sections 287.135(5), F.S., and 287.135(3), F.S., the Proposer agrees the District may immediately terminate the resulting Contract for cause if the Proposer is found to have submitted a false certification or if the Proposer is placed on the Scrutinized Companies with Activities in Sudan List, the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List, the Scrutinized Companies that Boycott Israel List, or is engaged in a boycott of Israel, or has engaged in business operations in Cuba or Syria during the term of the Contract. Any company that submits a bid or proposal for a contract, or intends to enter into or renew a contract with an agency or local governmental entity for commodities or services, of any amount, must certify that the company is not participating in a boycott of Israel.

By signing this certification below, the Authorized Representative affirms they have the authority to bind the Proposer and acknowledges and affirms the statements above.

STATE OF FLORIDA _____
COUNTY OF _____ **Authorized Representative (Print)** **Authorized Representative (Signature)**

The foregoing instrument was acknowledged before me by means of ☐ physical presence or ☐ online notarization this _____ day of _____, 20____, by _____ (name of authorized representative) as _____ (position title) for _____ (Vendor Name).

Notary Signature

(NOTARY SEAL)

Name of Notary (Typed, Printed, or Stamped)

Personally Known ____ OR Produced Identification ____ Type of Identification _____

Attachment III
Notice of Conflict of Interest

Company Name: _____ [Proposers shall complete either Section 1 or Section 2]

Solicitation Number: RFP 241-2024

To participate in this solicitation process and comply with the provisions of Chapter 112.313, Florida Statutes, the undersigned corporate officer hereby discloses the following information to the Leon County School Board.

Section 1

I hereby certify that no official or employee of the School Board requiring the goods or services described in these specifications has a material financial interest in this company.

_____	_____
Authorized Representative (Signature)	Authorized Representative (Print)

Section 2

I hereby certify that the following named Leon County School Board official(s) and employee(s) have a material financial interest(s) (over 5%) in this company, and they have filed Conflict of Interest Statements with the Leon County Supervisor of Elections, before the Proposal Opening.

Name	Title/Position	Date of Filing
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

_____	_____
Authorized Representative (Signature)	Authorized Representative (Print)

Date

Attachment IV Proposer Contact Information

The Proposer shall identify the contact information for solicitation and contractual purposes via the requested fields in the table below.

	For solicitation purposes, the Proposer's representative shall be:	For contractual purposes, should the Proposer be awarded, the Proposer's representative shall be:
Name:		
Title:		
Street Address:		
City, State, Zip code		
Telephone: (Office)		
Telephone: (Cell)		
Email:		

_____	_____	_____
Company Name	Authorized Representative (Signature)	Date
_____	_____	
FEIN #	Authorized Representative (Printed)	

Attachment V
Proposer's Reference Form

In the spaces provided below, the Proposer shall list all names under which it has operated during the past five (5) years.

On the following pages, the Proposer shall provide the information indicated for three (3) separate and verifiable references. The references listed must be for businesses or government entities for whom the Proposer has provided services of similar scope and size to the services identified in the RFP. The same reference may not be listed for more than one (1) organization, and confidential references shall not be included. In the event the Proposer has had a name change since the time work was performed for a listed reference, the name under which the Proposer operated at that time must be provided in the space provided for the Proposer's Name.

References that are listed as subcontractors in the response will not be accepted as references under this solicitation. Additionally, References shall pertain to current and ongoing services or those that were completed before January 1, 2023. References shall not be given by:

- Persons currently or formerly employed or supervised by the Proposer or its affiliates.
- Board members within the Proposer's organization.
- Relatives of any of the above.

Additionally, the District reserves the right to contact references other than those identified by the Proposer to obtain additional information regarding past performance.

Proposer's Reference Form

Reference #1

Proposer Name: _____

Reference Company Name: _____

Address: _____

Primary Contact Person: _____ Alternate Contact Person: _____

Primary Contact Title: _____ Alternate Contact Title: _____

Primary Contact Phone: _____ Alternate Contact Phone: _____

Primary Contact Email: _____ Alternate Contact Email: _____

Contract Performance Period: _____ Location of Services: _____

Brief description of the services performed for this reference:

Overall contract performance: ☐ Poor ☐ Fair ☐ Adequate ☐ Good ☐ Excellent

Would you contract with this vendor again? Yes _____ No _____

Primary Reference Contact Signature

Date

The foregoing instrument was acknowledged before me by means of ☐ physical presence or ☐ online notarization
this _____ day of _____, 20____, by _____ (name of authorized representative) as
_____ (position title) for _____ (company name).

Notary Signature

(NOTARY SEAL)

Name of Notary (Typed, Printed, or Stamped)

Personally Known ☐ **OR** Produced Identification ☐ Type of Identification _____

District-Wide Classification and Compensation Study

Proposer's Reference Form
Reference #2

Proposer Name: _____

Reference Company Name: _____

Address: _____

Primary Contact Person: _____ Alternate Contact Person: _____

Primary Contact Title: _____ Alternate Contact Title: _____

Primary Contact Phone: _____ Alternate Contact Phone: _____

Primary Contact Email: _____ Alternate Contact Email: _____

Contract Performance Period: _____ Location of Services: _____

Brief description of the services performed for this reference:

Overall contract performance: ☐ Poor ☐ Fair ☐ Adequate ☐ Good ☐ Excellent

Would you contract with this vendor again? ☐ Yes ☐ No

Primary Reference Contact Signature

Date

The foregoing instrument was acknowledged before me by means of ☐ physical presence or ☐ online notarization
this _____ day of _____, 20____, by _____ (name of authorized representative) as
_____ (position title) for _____ (company name).

Notary Signature

(NOTARY SEAL)

Name of Notary (Typed, Printed, or Stamped)

Personally Known ☐ **OR** Produced Identification ☐ Type of Identification _____

District-Wide Classification and Compensation Study

Proposer's Reference Form

Reference #2

Proposer Name: _____

Reference Company Name: _____

Address: _____

Primary Contact Person: _____ Alternate Contact Person: _____

Primary Contact Title: _____ Alternate Contact Title: _____

Primary Contact Phone: _____ Alternate Contact Phone: _____

Primary Contact Email: _____ Alternate Contact Email: _____

Contract Performance Period: _____ Location of Services: _____

Brief description of the services performed for this reference:

Overall contract performance: ☐ Poor ☐ Fair ☐ Adequate ☐ Good ☐ Excellent

Would you contract with this vendor again? ☐ Yes ☐ No

Primary Reference Contact Signature

Date

The foregoing instrument was acknowledged before me by means of ☐ physical presence or ☐ online notarization
this _____ day of _____, 20____, by _____ (name of authorized representative) as
_____ (position title) for _____ (company name).

Notary Signature

(NOTARY SEAL)

Name of Notary (Typed, Printed, or Stamped)

Personally Known ☐ **OR** Produced Identification ☐ Type of Identification _____

Attachment VI
Local Preference Affidavit

To qualify for the Local Vendor Preference, a Proposer must have a physical location in Leon County (or an Adjacent County), employ at least one (1) person at that location, and have been licensed, as required, for at least six (6) months before the Proposal Opening. The Proposer, on a day-to-day basis, should provide the goods/services provided under this Contract substantially from the local business address. Post Office boxes are not acceptable for purposes of obtaining this preference.

By completing this Affidavit, the Proposer affirms that it is a Local or Adjacent County Business, as defined by Board Policy 6450.

Please complete the following in support of the self-certification:

Proposer Name: _____

Physical Address: _____

County: _____

Phone of Local Location: _____

Length of Time at this Location: _____ **# of Employees at this Location:** _____

Is your business certified as a small business enterprise through Leon County Schools? _____

STATE OF FLORIDA
COUNTY OF _____

Authorized Representative (Print) **Authorized Representative (Signature)**

The foregoing instrument was acknowledged before me by means of ☐ physical presence or ☐ online notarization this _____ day of _____, 20____, by _____ (name of authorized representative) as _____ (position title) for _____ (company name).

Notary Signature

(NOTARY SEAL)

Name of Notary (Typed, Printed, or Stamped)

Personally Known ☐ **OR** Produced Identification ☐ Type of Identification _____

District-Wide Classification and Compensation Study

Attachment VII
Subcontracting Form

The Proposer shall complete the information below on all subcontractors that will be providing services to the Proposer to meet the requirements of the Contract, should the Proposer be awarded. Submission of this form does not indicate the District’s approval of such subcontractor(s), but provides the District with information on proposed subcontractors for review.

Complete a separate sheet for each subcontractor.

Prime Proposer Name: _____

Type/Description of Goods or Service Subcontractor will provide:

Subcontractor Company Name: _____ FEIN: _____

Contact Person: _____ Contact Phone Number: _____

Address: _____

Email address: _____

Currently Registered as a Small Business Yes _____ No _____
with Leon County Schools?

Local Proposer per PO6450? Yes _____ No _____

In a job description format, identify the responsibilities and duties of the subcontractor based on the specifications or scope of services outlined in this solicitation.

Attachment VIII
Drug-Free Workplace Certification

The undersigned Proposer, in accordance with Section 287.087, F.S. hereby certifies that

Company Name

does:

1. Publish a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance is prohibited in the workplace and specifying the actions that will be taken against employees for violations of such prohibition.
2. Inform employees about the dangers of drug abuse in the workplace, the business's policy of maintaining a drug-free workplace, any available drug counselling, rehabilitation, employee assistance programs and the penalties that may be imposed upon employees for drug abuse violations.
3. Give each employee engaged in providing the commodities or contractual services that are under proposal a copy of the statement specified in Paragraph 1.
4. In the statement specified in Paragraph 1, notify the employees that, as a condition of working on the commodities or contractual services that are under proposal, the employee will abide by the terms of the statement and will notify the employer of any conviction of, or plea of guilty or nolo contendere to, any violation of Chapter 893 or of any controlled substance law of the United States or any state, for a violation occurring in the workplace no later than five (5) days after such conviction.
5. Impose a sanction on, or require the satisfactory participation in a drug abuse assistance or rehabilitation program if such is available in the employee's community by any employee who is so convicted.
6. Make a good faith effort to continue to maintain a drug-free workplace through the implementation of Paragraphs 1 thru 5.

As the person authorized to sign this statement, I certify that this Contractor complies fully with the above requirements.

Signature of Authorized Officer _____

Date _____

Attachment IX

Certification Regarding Debarment, Suspension, Ineligibility and Voluntary Exclusion

AD-1048

Lower Tier Covered Transactions

The following statement is made in accordance with the Privacy Act of 1974 (5 U.S.C. § 552a, as amended). This certification is required by the regulations implementing Executive Order 12549, Debarment and Suspension, and 2 C.F.R. §§ 180.300, 180.335, Participants' responsibilities. The regulations were amended and published on August 31, 2005, in 70 Fed. Reg. 51865-51880. Copies of the regulations may be obtained by contacting the Department of Agriculture agency offering the proposed covered transaction.

According to the Paperwork Reduction Act of 1995 an agency may not conduct or sponsor, and a person is not required to

(Read instructions on page two before completing certification.)

- A. The prospective lower tier participant certifies, by submission of this proposal, that neither it nor its principals is presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any Federal department or agency;
- B. Where the prospective lower tier participant is unable to certify to any of the statements in this certification, such prospective participant shall attach an explanation to this proposal.

ORGANIZATION NAME	PR/AWARD NUMBER OR PROJECT NAME
NAME(S) AND TITLE(S) OF AUTHORIZED REPRESENTATIVE(S)	
SIGNATURE(S)	DATE

In accordance with Federal civil rights law and U.S. Department of Agriculture (USDA) civil rights regulations and policies, the USDA, its agencies, offices, and employees, and institutions participating in or administering USDA programs are prohibited from discriminating based on race, color, national origin, religion, sex, gender identity (including gender expression), sexual orientation, disability, age, marital status, family/parental status, income derived from a public assistance program, political beliefs, or reprisal or retaliation for prior civil rights activity, in any program or activity conducted or funded by USDA (not all bases apply to all programs). Remedies and complaint filing deadlines vary by program or incident.

Persons with disabilities who require alternative means of communication for program information (e.g., Braille, large print, audiotape, American Sign Language, etc.) should contact the responsible agency or USDA's TARGET Center at (202) 720-2600 (voice and TTY) or contact USDA through the Federal Relay Service at (800) 877-8339. Additionally, program information may be made available in languages other than English.

To file a program discrimination complaint, complete the USDA Program Discrimination Complaint Form, AD-3027, found online at [How to File a Program Discrimination Complaint \(https://www.ascr.usda.gov/filing-program-discrimination-complaint-usda-customer\)](https://www.ascr.usda.gov/filing-program-discrimination-complaint-usda-customer) and at any USDA office or write a letter addressed to USDA and provide in the letter all of the information requested in the form. To request a copy of the complaint form, call (866) 632-9992. Submit your completed form or letter to USDA by: (1) mail: U.S. Department of Agriculture, Office of the Assistant Secretary for Civil Rights, 1400 Independence Avenue, SW, Washington, D.C. 20250-9410; (2) fax: (202) 690-7442.

Certification Regarding Debarment, Suspension, Ineligibility and Voluntary Exclusion AD-1048
Attachment IX
RFP 241-2024
District-Wide Classification and Compensation Study

Instructions for Certification

- (1)** By signing and submitting this form, the prospective lower-tier participant is providing the certification set out on page 1 in accordance with these instructions.
- (2)** The certification in this clause is a material representation of fact upon which reliance was placed when this transaction was entered into. If it is later determined that the prospective lower tier participant knowingly rendered an erroneous certification, in addition to other remedies available to the Federal Government, the department or agency with which this transaction originated may pursue available remedies, including suspension or debarment.
- (3)** The prospective lower tier participant shall provide immediate written notice to the person(s) to which this proposal is submitted if at any time the prospective lower tier participant learns that its certification was erroneous when submitted or has become erroneous by reason of changed circumstances.
- (4)** The terms "covered transaction," "debarred," "suspended," "ineligible," "lower tier covered transaction," "participant," "person," "primary covered transaction," "principal," "proposal," and "voluntarily excluded," as used in this clause, have the meanings set out in the Definitions and Coverage sections of the rules implementing Executive Order 12549, at 2 C.F.R. Parts 180 and 417. You may contact the department or agency to which this proposal is being submitted for assistance in obtaining a copy of those regulations.
- (5)** The prospective lower tier participant agrees by submitting this form that, should the proposed covered transaction be entered into, it shall not knowingly enter into any lower tier covered transaction with a person who is debarred, suspended, declared ineligible, or voluntarily excluded from participation in this covered transaction, unless authorized by the department or agency with which this transaction originated.
- (6)** The prospective lower tier participant further agrees by submitting this form that it will include this clause titled "Certification Regarding Debarment, Suspension, Ineligibility and Voluntary Exclusion - Lower Tier Covered Transactions," without modification, in all lower tier covered transactions and in all solicitations for lower tier covered transactions.
- (7)** A participant in a covered transaction may rely upon a certification of a prospective participant in a lower tier covered transaction that is not debarred, suspended, ineligible, or voluntarily excluded from the covered transaction, unless it knows that the certification is erroneous. A participant may decide the method and frequency by which it determines the eligibility of its principals. Each participant may, but is not required to, check the System for Award Management (SAM) database.
- (8)** Nothing contained in the foregoing shall be construed to require establishment of a system of records to render in good faith the certification required by this clause. The knowledge and information of a participant is not required to exceed that which is normally possessed by a prudent person in the ordinary course of business dealings.
- (9)** Except for transactions authorized under paragraph (5) of these instructions, if a participant in a covered transaction knowingly enters into a lower tier covered transaction with a person who is suspended, debarred, ineligible, or voluntarily excluded from participation in this transaction, in addition to other remedies available to the Federal Government, the department or agency with which this transaction originated may pursue available remedies, including suspension and/or debarment.

Attachment X

CERTIFICATION REGARDING LOBBYING

CERTIFICATION FOR CONTRACTS, GRANTS, AND COOPERATIVE AGREEMENTS

The undersigned certifies, to the best of his or her knowledge and belief, that:

1. No Federal appropriated-funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of congress, or an employee of a member of congress in connection with the awarding of any Federal contract, the making of any Federal grant, the making of any Federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any Federal contract, grant, loan, or cooperative agreement.
2. If any funds other than Federal-appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a member of congress, an officer or employee of congress, or an employee of a member of congress in connection with this Federal contract, grant, loan, or cooperative agreement, the undersigned shall complete and submit Standard Form-LLL, Disclosure Form to Report Lobbying, in accordance with its instructions.
3. The undersigned shall require that the language of this certification be included in the award documents for all sub-awards at all tiers (including sub-contracts, subgrants, and contracts under grants, loans and cooperative agreements) and that all sub-recipients shall certify and disclose accordingly.

This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering into this transaction imposed by Section 1352, title 31, U.S. Code. Any person who fails to file the required certification shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

By _____

Date: _____

(Signature of Official (Executive Director) Authorized to Sign Application)

By _____

Date: _____

(Signature of Official (Chief Financial Officer) Authorized to Sign Application)

For _____

Name of Grantee

Title of Grant Program

District-Wide Classification and Compensation Study

Disclosure of Lobbying Activities

Complete this form to disclose lobbying activities pursuant to 31 U.S.C. 1352

1. Type of Federal Action: a. contract ____ b. grant c. cooperative agreement d. loan e. loan guarantee f. loan insurance	2. Status of Federal Action: a. bid/offer/application ____ b. initial award c. post-award	3. Report Type: a. initial filing ____ b. material change For material change only: Year ____ quarter ____ Date of last report ____
4. Name and Address of Reporting Entity: ____ Prime ____ Subawardee Tier____, if Known: Congressional District, if known:		5. If Reporting Entity in No. 4 is Subawardee, Enter Name and Address of Prime: Congressional District, if known:
6. Federal Department/Agency:	7. Federal Program Name/Description: CFDA Number, if applicable: _____	
8. Federal Action Number, if known:	9. Award Amount, if known: \$	
10. a. Name and Address of Lobbying Registrant <i>(if individual, last name, first name, MI):</i>	b. Individuals Performing Services (including address if different from No. 10a) <i>(last name, first name, MI):</i>	

District-Wide Classification and Compensation Study

<p>11. Information requested through this form is authorized by Title 31 U.S.C. Section 1352. This disclosure of lobbying activities is a material representation of fact upon which reliance was placed by the tier above when this transaction was made or entered into. This disclosure is required pursuant to 31 U.S.C. 1352. This information will be reported to the Congress semi-annually and will be available for public inspection. Any person who fails to file the required disclosure shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.</p>	<p>Signature: _____</p> <p>Print Name: _____</p> <p>Title: _____</p> <p>Telephone No.: _____ Date: _____</p>
---	--

INSTRUCTIONS FOR COMPLETION OF SF-LLL, DISCLOSURE OF LOBBYING ACTIVITIES

This disclosure form shall be completed by the reporting entity, whether subawardee or prime Federal recipient, at the initiation or receipt of a covered Federal action or a material change to a previous filing, pursuant to Title 31 U.S.C. section 1352. The filing of a form is required for each payment or agreement to make payment to any lobbying entity for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with a covered Federal action. Complete all items that apply for both the initial filing and material change report. Refer to the implementing guidance published by the Office of Management and Budget for additional information.

1. Identify the type of covered Federal action for which lobbying activity is and/or has been secured to influence the outcome of a covered Federal action.
2. Identify the status of the covered Federal action.
3. Identify the appropriate classification of this report. If this is a follow-up report caused by a material change to the information previously reported, enter the year and quarter in which the change occurred. Enter the date of the last previously submitted report by this reporting entity for this covered Federal action.
4. Enter the full name, address, city, State and zip code of the reporting entity. Include Congressional District, if known. Check the appropriate classification of the reporting entity that designates if it is, or expects to be, a prime or subaward recipient. Identify the tier of the subawardee, e.g., the first subawardee of the prime is the 1st tier. Subawards include but are not limited to subcontracts, subgrants and contract awards under grants.
5. If the organization filing the report in item 4 checks "Subawardee," then enter the full name, address, city, State and zip code of the prime Federal recipient. Include Congressional District, if known.
6. Enter the name of the federal agency making the award or loan commitment. Include at least one organizational level below agency name, if known. For example, Department of Transportation, United States Coast Guard.
7. Enter the Federal program name or description for the covered Federal action (item 1). If known, enter the full Catalog of Federal Domestic Assistance (CFDA) number for grants, cooperative agreements, loans, and loan commitments.
8. Enter the most appropriate Federal identifying number available for the Federal action identified in item 1 (e.g., Request for Proposal (RFP) number; Invitations to Bid (ITB) number; grant announcement number; the contract, grant, or loan award number; the application/proposal control number assigned by the Federal agency). Included prefixes, e.g., "RFP-DE-90-001."
9. For a covered Federal action where there has been an award or loan commitment by the Federal agency, enter the Federal amount of the award/loan commitment for the prime entity identified in items 4 or 5.
10. (a) Enter the full name, address, city, State, and zip code of the lobbying registrant under the Lobbying Disclosure Act of 1995 engaged by the reporting entity identified in item 4 to influence the covered Federal action.

(b) Enter the full names of the individual(s) performing services, and include full address if different from 10(a). Enter Last Name, First Name, and Middle Initial (MI).
11. The certifying official shall sign and date the form; print his/her name, title, and telephone number.

A Technical Proposal to Conduct a District-Wide Classification and Compensation Study for Leon County Schools, FL RFP #241-2024

ORIGINAL



Evergreen Solutions, LLC

January 11, 2024

A Technical Proposal to Conduct a District-Wide Classification and Compensation Study for Leon County Schools, FL RFP #241-2024

Submitted to:

**Ms. Staci Coppinger, Procurement Officer
Leon County Schools
Purchasing Department
3397 West Tharpe Street
Tallahassee, Florida 32303**

Submitted by:

S



**Evergreen Solutions, LLC
2528 Barrington Circle, Unit 201
Tallahassee, Florida 32308
(850) 383-0111 (ph) / (850) 383-1511 (fax)**

January 11, 2024

Table of Contents

A.	Overview	A-1
B.	Experience and Qualifications.....	B-1
	B.1 References	B-1
	B.2 Company Profile.....	B-2
	B.3 Narrative Record of Past Experience.....	B-11
C.	Approach to Service Delivery.....	C-1
	C.1 Approach and Methodology	C-1
	C.2 Detailed Work Plan	C-11
	C.3 Proposed Timeline	C-20
	C.4 Quality Control Measures	C-21
	C.5 Select Relevant K-12 Experience	C-22
D.	Required Forms.....	D-1

COST PROPOSAL (UNDER SEPARATE COVER)



Section A

Overview



A. Overview

As required in the Request for Proposals (RFP), we have attached an Executive Summary/Letter of Interest stating our understanding of the scope of services to be provided and our capability to comply with all terms and conditions of the RFP. Attachment III of the RFP – Notice of Conflict of Interest is included with the other required forms in **Section D** of our proposal.



Evergreen Solutions, LLC

2528 Barrington Circle • Unit #201 • Tallahassee, Florida 32308
850.383.0111 • fax 850.383.1511

EXECUTIVE SUMMARY/LETTER OF INTEREST

January 10, 2024

Ms. Staci Coppinger, Procurement Officer
Leon County Schools
Purchasing Department
3397 West Tharpe Street
Tallahassee, Florida 32303

Dear Ms. Coppinger:

Evergreen Solutions, LLC is pleased to submit a proposal to conduct a District-Wide Classification and Compensation Study for Leon County Schools (District). Our response is based on our review of the Request for Proposals (RFP #241-2024), our experience working with hundreds of public sector organizations, including many school districts, our knowledge of the Florida labor market, and as our knowledge of best practices in human resource management. **We believe we are the best suited to perform the work being requested by the District as we have conducted more than 1,200 similar studies for public sector organizations throughout the country.**

Evergreen Solutions was formed in 2004 to provide an alternative to traditional consulting practices. 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.

As a national firm, Evergreen Solutions continues to grow and our territory now includes 47 states. In the State of Florida, Evergreen has worked with or is currently on contract to work with more than 200 clients in providing work similar in scope to the services being requested, including the following K-12 clients: School Board of Bay County; Clay County Public Schools; School Board of Sarasota County; School Board of Marion County; School Board of Lee County; Broward County School District; Orange County School District; Hillsborough County School District; Miami-Dade County School District; and Florida Virtual School.

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: Atlanta Public Schools, GA; Sumter County Schools, GA; DeKalb County Public Schools, GA; Douglas County Schools, GA; Bibb County School District, GA; Savannah-Chatham County Public School System, GA; Tuscaloosa City Schools, AL; Dothan City Schools, AL; Caddo Parish School Board, LA; Springfield R-12 School District, MO; Liberty Public School District #53, MO; Raytown C-2 School District, MO; Kansas City Public Schools, MO; Toledo Public Schools, OH; Rutherford County School District, TN; Knox County Schools, TN; Fayette County Public Schools, KY; Akron Public Schools, OH; Dayton Public Schools, OH; Cleveland Metropolitan School District, OH; School District of Beloit, WI; Grand Rapids Public Schools, MI; 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; Dinwiddie 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; Accomack 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; Powhatan 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; Franklin County Public Schools, VA; Colonial Heights 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; Lincoln County 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; School District of Lexington and Richland Counties, SC; Florence County School District Three, SC; Wayside School District, TX; Gadsden Independent School District, NM; Albuquerque Public Schools, NM; Los Angeles Unified School District, CA; Ogden City School District, UT; Davis School District, UT; Seattle Public Schools, WA; Blaine County School District No. 61, ID; and others. Information regarding the services provided to some of these school district clients can be found in **Section C.5** of our proposal.

Our proposed Evergreen Team is fully capable of comprehending the challenges and goals of the District because of our vast understanding of K-12 human resources management. The Evergreen Team has considerable expertise in conducting classification and compensation 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 B.2** of our proposal.

Some of the human resource services Evergreen has focused on include: classification and compensation studies; pay equity studies; 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.

Evergreen understands the District is looking for an outside consultant to conduct a comprehensive position evaluation/audit of all classifications; evaluate if a functional consolidation of positions/classifications to consolidate pay plans into a manageable number of pay schedules is appropriate; evaluate and recommend new classifications where appropriate; incorporate opportunities for career progression steps within specific classifications, where appropriate; recommend whether the pay ranges are appropriate for the classes, both internally and externally and whether they are benchmarked to the geographic labor market with which the Board competes. In the end, Evergreen will provide an implementation strategy and plan options for both an updated classification and compensation structure.

The key facets of our approach as identified in **Section C.1** of our proposal include:

- 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, school district administrators, and select staff should be involved in 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 I am authorized to commit our firm contractually to this assignment. We have read your terms and conditions and believe we can successfully work within your requirements.

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.

Sincerely,

Dr. Jeff Ling, President



Section B
Experience and Qualifications



B. *Experience and Qualifications*

Evergreen Solutions is well qualified to conduct a District Wide Classification and Compensation Study for Leon County Schools due to our experience in conducting more than 1,200 similar studies for school districts and other public sector organizations across the country. In this section we provide references, our company's profile, the qualifications of our proposed project team, our record of past experience, and litigation information.

B.1 References

We have provided the following three references that we feel demonstrate our experience within the past 12 months 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. As required in the Request for Proposals, we have also included a signed reference form for each reference in **Section D** of our proposal.

District Wide Compensation Study

School Board of Sarasota County, Florida

Contact Information: Dr. Allison S. Foster, Executive Director, (941) 927-9000 ext. 31227, Allison.Foster@sarasotacountysschools.net

Dates of Service: 2022 – 2023 / Evergreen also previously worked with the District in 2018



Classification and Compensation Study

Bibb County School District, Georgia

Contact Information: Emanuel M. Frazier Jr., Assistant Superintendent of Human Resources, 484 Mulberry Street, Suite 501, Macon, Georgia 31201, (478) 765-8668, Emanuel.Frazier@bcsdk12.net



Compensation and Classification Study

Knox County Schools, Tennessee

Contact Information: Scott Bolton, HR Operations Executive Director, 1000 North Central Street, Knoxville, Tennessee 37917 (865) 594-1800, Scott.Bolton@knoxschools.org



B.2 Company Profile

Evergreen Solutions, LLC is a national, multidisciplinary, public sector management consulting firm, 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 employs 29 full- and nine part-time employees who provide a variety of human resources consulting work. Evergreen is located at 2528 Barrington Circle, Unit 201, Tallahassee, Florida 32308.

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: compensation studies; classification studies; equal pay studies; performance appraisal reviews; workload analyses; staffing studies; disparity studies; training assessments; management and performance audits; and strategic planning.

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

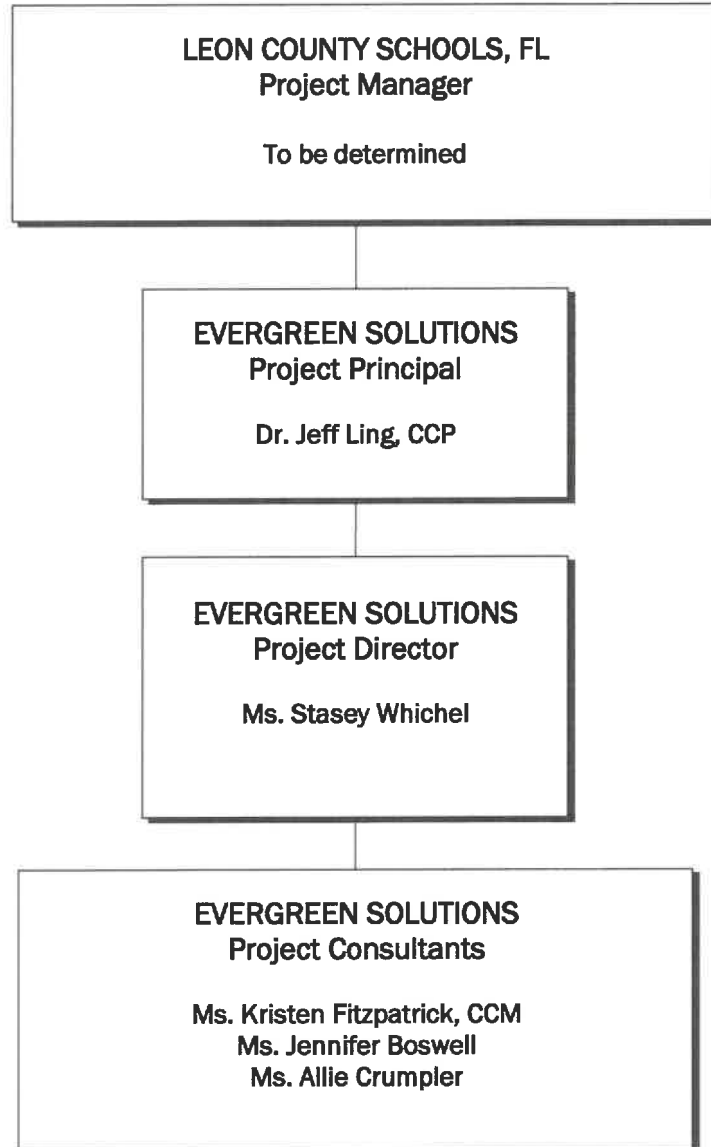


Evergreen Solutions assists public sector professionals in exercising control over the inter-related elements that determine success or failure. We accomplish that by applying a situation-responsive discipline that emphasizes: full visibility into the entire school district through research and discovery; 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 classification and compensation studies for school districts, local governments, and other public sector organizations throughout the country; comprehensive experience in all components vital to the successful completion of this engagement, knowledge of relevant Florida 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.

**Exhibit B-1
Proposed Project
Team and Personnel
Assignments**

Exhibit B-1 shows our proposed project team and personnel. The structure has been designed to clearly define the roles and responsibilities of each part of the District Wide Classification and Compensation Study for Leon County Schools (District) so that there will be no confusion as to who is responsible for any aspect of this engagement.



Leon County Schools (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.

Key Personnel

Project Principal Dr. Jeff Ling, CCP

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's Project Director. Evergreen designates a Project Director for each HR consulting project who will have ultimate accountability for the success of this project, contractual authority over the contract, and will be our top level of project responsibility. The Project Director will work with the District's Project Manager and will have the most frequent contact with the District assign project activities to the Project Consultants, and ensure that deliverables are met within specified timelines.

Evergreen's 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, collect the data for the salary survey, 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 District Wide Classification and Compensation Study for Leon County Schools.

In this section we provide 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.

Dr. Jeff Ling is the President of Evergreen Solutions and has been with the firm since its inception. 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; 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 hundreds of 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 1,200 projects related to classification and/or compensation.**
- 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.

**Project Director
Ms. Stasey Whichel**

Ms. Stasey Whichel is a Project Manager with over 25 years of experience in education and government. As a former public sector Deputy Director, she demonstrated experience in policy development, strategic planning, human resource management, budgeting, and risk evaluation.

Early in her career, Ms. Whichel worked as a high school math teacher and served as the Secondary Faculty Director and Curriculum Coordinator. She also developed a strategic approach to increasing course offerings, realigned staff resources, and designed survey tools to evaluate current and future needs.

Ms. Whichel acquired public sector experience in project management, conducted programmatic audits and reviews to ensure compliance with state and federal rules and regulations, developed programmatic operating procedures, drafted internal management policies, and identified areas for efficiencies and improvements. She has also conducted reviews of relevant state and federal legislation and drafted bill

analysis and agency comments. She led a team through an organizational realignment to better fit contemporary management needs, leveraged outside funding sources, and trained staff members on state and federal programs. As a member of agency leadership, she collaborated on HR policy reviews, conducted salary compensation studies, and developed recommendations for legislative budget issues. She also participated in the development of multi-faceted, long-term strategies designed to achieve agency and division goals, established metrics, and evaluated programmatic performance. She developed survey tools to measure employee satisfaction and identify staff needs and used findings to inform management decisions and created opportunities to improve staff morale. Her HR experience also includes the development of documents related to job advertisements, position descriptions, objective performance expectations, and performance reviews. She is experienced in applicant selection, on-boarding, identifying training requirements, and mentoring staff.

Ms. Whichel possesses expertise in the following areas: conducting organizational studies, evaluating risk, and reviewing operational procedures; providing guidance for change management; developing workflow and process design; identifying specific training needs; on-boarding new staff; conducting classification, compensation, and salary comparison studies; preparing employee surveys and valuations of employee satisfaction; working with leadership to develop or update agency policies, programs, and guidelines; developing Job descriptions and performance management tools; fostering employee communications; and administering contracts, accounting and auditing principles.

A sample of some of the public sector projects that Ms. Whichel has been involved with include: a Compensation and Classification Study for the School Board of Sarasota County, FL; a Classification and Compensation Study for the School Board of Bay County, FL; Compensation Structure and Framework for the School Board of Lee County, FL; a Salary Survey and Compensation Review for the Children's Trust of Miami Dade County, FL; a Classification and Compensation Study for Service Management Solutions for Children (SMS) and Partnership for Strong Families (PSF); a Classification and Compensation Study for Hardee County, FL; a Compensation Study for Seminole County, FL; a Compensation Study for the City of North Port, FL; a Compensation Study for the City of Bunnell, FL; a Classification and Compensation Study for the Town of Lake Park, FL; a Classification and Compensation Study for the City of Punta Gorda, FL; a Compensation Study for the City of Homestead, FL; a Classification and Compensation Study for the Barefoot Bay Recreation District, FL; County, FL; a Classification and Compensation Study for the City of Palm Bay, FL; a Classification and Compensation Study for Charlotte County, FL; a Compensation Study and Gender Analysis for the Town of Medley, FL; a Classification and Compensation Study for the Early Learning Coalition of Pinellas County, FL; a Classification and Compensation Study for the Bibb County School District, GA; Job Architecture Consulting for HR for the Savannah-Chatham County Public School System, GA; a Compensation Study for the City of Griffin, GA; a Classification and Compensation Study for Habersham County, GA; a Wage Study for Madison County, GA; a Classification and Compensation Study for the City of Northport, AL; a Compensation Study for Shelby County, AL; Compensation Study for Rutherford County Schools, TN; Compensation Study Consultant Services for Knox County Schools, TN; a Comprehensive Compensation Study for Fayette County Public Schools, KY; Classification, Compensation, and Total Staff Rewards Consulting for the School District of Beloit, WI; a Compensation Study for Saint Paul Public Schools, MN; an Operations

Review/Efficiency Study for the City of Norwalk and Norwalk Public Schools, CT; a Compensation Study for the Town of Ocean City, MD; a Classification and Compensation Study for Franklin County Public Schools, VA; a Compensation Study for Harrisonburg City Public Schools, VA; Comprehensive Classification and Compensation Plan for Dinwiddie County Public Schools, VA; an Updated Solution File for Danville Public Schools, VA; a Classification and Compensation Study for Isle of Wight County, VA; a Classification and Compensation Study for Goochland County, VA; a Compensation Study for New Horizon Regional Education Centers, VA; a Classification and Compensation Study for the Town of Smithfield, VA; a Compensation Study for Lincoln County Schools, NC; Compensation Strategy Review and Classification Study for the Town of Clayton, NC; an Organizational/Staffing Study for the Town of Clayton, NC; Job Description Review and Salary Study for the Florence County School District Three, SC; a Compensation and Benefits Study for the City of Rock Hill, SC; a Classification and Compensation Study for School District 5 of Lexington and Richland Counties, SC; a Compensation Study for the City of Columbia, SC; Job Description Review and Salary Study for the Florence County School District Three, SC; a Compensation and Benefits Study for the City of Rock Hill, SC; a Classification and Compensation Study for School District 5 of Lexington and Richland Counties, SC; a Compensation Study for the City of Columbia, SC; a Compensation and Pay Classification Plan Study Raytown C-2 School District, MO; a Compensation and Classification Study for the Liberty Public School District #53, MO; a Compensation Study for Kansas City Public Schools, MO; a Classification and Compensation Study for the Blaine County School District No. 61, ID; a Job Analysis, Classification and Compensation Study for the Davis School District, UT; and a Classification and Compensation Study for the City of Boulder City, NV.

Ms. Whichel possesses a Bachelor of Science degree in Biology from The Florida State University.

**Project Consultant
Ms. Kristen
Fitzpatrick, CCM**

Ms. Kristen Fitzpatrick, CCM, is a Senior Consultant with Evergreen who has more than 14 years' experience in adult learning and K-12 education. She was a Language Arts teacher in Leon County Schools where she received a District rating of Highly Effective and was recognized as a High Impact Teacher by the Florida Department of Education. As a teacher, she supervised interns and practicum university students, developed, implemented, and sponsored multiple extra-curricular activities for students, including the National Junior Honor Society, school spelling bee, and orientation camp for incoming students, and was a business manager for athletic teams.

Ms. Fitzpatrick was a Program Specialist for the Florida Department of Education where she oversaw educator retention and development programs, including revisions, marketing, and rule developments for the following: Clinical Education Program Developer Academy, Professional Education Competency Program, and the Title II, Part A: State-Level Equitable Services Program for Non-Profit Private Schools. As a Program Specialist, she managed approximately \$9 million in professional development and recruitment grants and contracts for the Bureau, participated in Professional Development Protocol site visits in order to assist school districts in developing strategic plans for professional learning, and was a member of the Florida Teacher of the Year internal

evaluation committee. She was also a volunteer mentor for a middle school in Leon County Schools for two years.

Some of the K-12 projects that Ms. Fitzpatrick has been involved with include: a Compensation and Classification Study for the School Board of Sarasota County, FL; a Classification and Compensation Study for the School Board of Bay County, FL; Compensation Structure and Framework for the School Board of Lee County, FL; a Classification and Compensation Study for Service Management Solutions for Children (SMS) and Partnership for Strong Families (PSF), FL; Classification and Compensation Study for the Early Learning Coalition of Pinellas County, FL; a Classification and Compensation Study for the Bibb County School District, GA; Job Architecture Consulting for HR for the Savannah-Chatham County Public School System, GA; a Compensation Study and a Classification Analysis for Accomack County Public Schools, VA; a Classification and Compensation Study for Franklin County Public Schools, VA; a Compensation Study for Harrisonburg City Public Schools, VA; a Comprehensive Classification and Compensation Plan for Dinwiddie County Public Schools, VA; an Updated Solution File for Danville Public Schools, VA; a Compensation Study for New Horizon Regional Education Centers, VA; a Compensation Study for Lincoln County Schools, NC; Job Description Review and Salary Study for the Florence County School District Three, SC; a Classification and Compensation Study for School District 5 of Lexington and Richland Counties, SC; a Compensation and Pay Classification Plan Study Raytown C-2 School District, MO; a Compensation and Classification Study for the Liberty Public School District #53, MO; a Compensation Study for Kansas City Public Schools, MO; a Compensation Study for Rutherford County Schools, TN; Compensation Study Consultant Services for Knox County Schools, TN; a Comprehensive Compensation Study for Fayette County Public Schools, KY; Classification, Compensation, and Total Staff Rewards Consulting for the School District of Beloit, WI; a Compensation Study for Saint Paul Public Schools, MN; a Classification and Compensation Study for the Blaine County School District No. 61, ID; and a Job Analysis, Classification and Compensation Study for the Davis School District, UT.

Ms. Fitzpatrick has a Master's of Science in Public Administration and Bachelor's Degree in Public Relations from the University of West Florida. In her Master's program, she specialized in leadership in public service and non-profit administration. She received her teaching credentials from the Educator Preparation Institute, Gulf Coast State College, Florida in 2011. She is a Florida Certified Contract Manager (CCM).

**Project Consultant
Ms. Jennifer Boswell**

Ms. Jennifer Boswell is a Senior Consultant with Evergreen Solutions. She has 16 years of experience in human resources and government and demonstrates a thorough working knowledge of human resource principles and practices. She possesses expertise in the areas of classification and compensation, organizational management, policy development, and strategic planning.

Ms. Boswell's public sector experience includes serving as the Human Resources Administrator for the Florida Commission on Offender Review and the Chief of State Workforce Design and Compensation Programs for the State of Florida, Department of Management Services. She has been a member of the National Compensation Association of State Governments and currently belongs to the National Society of Leadership and Success and the Society for Human Resource Management.

Some of the public sector projects that Ms. Boswell has been involved with include: a Compensation Study for Rutherford County School Board, TN; a Pay Plan, Classification and Compensation Study and Analysis for the Okaloosa Gas District, FL; Human Resources Consultant Services to the Juvenile Welfare Board, FL; a Classification and Compensation Study for the Town of Cutler Bay, FL; a Classification and Compensation Study for the City of Sunny Isles Beach, FL; a Compensation and Classification Study for the Town of Surfside, FL; a Compensation Study for the City of North Lauderdale, FL; a Classification and Compensation Study for Broward County Housing Authority, FL; a Classification and Compensation Study for Walton County, FL; a Classification and Compensation Study for the Village of Palmetto Bay, FL; a Compensation and Benefits Study for the City of Marco Island, FL; a Classification and Compensation Study for the City of Hallandale Beach, FL; Classification and Compensation Study Services for the City of Urbana, IL; a Classification and Compensation Study for Carbon County, PA; a Comprehensive Compensation Review and Update of Classification/Pay System for Cobb County, GA; a Compensation Review and Update of Pay and Classification System for the City of Marietta/Board of Lights and Water, GA; a Compensation Plan Update for the City of Garden City, GA; a Classification Study for the City of College Park, GA; a Classification and Compensation Study for Henry County, GA; a Total Compensation Study for the Brunswick-Glynn Joint Water and Sewer Commission, GA; a Classification and Compensation Study for the City of Sandy Springs, GA; a Classification and Compensation Study for the City of Fairburn, GA; a Classification and Compensation Study for Live Oak Public Libraries, GA; a Compensation and Pay Class Plan Study for the City of Foley, AL; and a Classification and Compensation Study for the City of Daphne, AL; a Classification and Compensation Study for the City of Albuquerque, NM; a Compensation and Classification Study for the City of Texas City, TX; a Classification and Compensation Study for Burnet County, TX; a Compensation Study for the City of Haskell, TX; a Compensation Plan Study for the City of South Padre Island, TX; a Classification and Compensation Study and Analysis for San Patricio County, TX; a Compensation Study for the City of Fredericksburg, TX; a Classification and Compensation Study for Shenandoah County, VA; a Classification and Compensation Study for the Eastern Shore of Virginia Broadband Authority, VA; a Job Classification and Compensation Study for the City of Milford, DE; a Personal Manual Review for Calvert County, MD; a Position Analysis and Revision Project for Harnett County, NC; a Classification and Compensation Study for the City of Hendersonville, NC; a Classification and Compensation Study for New Hanover County, NC; a Wage and

Compensation Analysis for the City of Isle of Palms, SC; and an Employee Compensation and Pay Class Study for the City of Rock Hill, SC;.

**Project Consultant
Ms. Allie Crumpler**

Ms. Allie Crumpler is a Consultant with Evergreen who has more than 10 years' experience in K-12 education. She was a Science Teacher and Department Head in Leon County Schools where she received a District rating of Highly Effective and was recognized as a District Lead Teacher and as a High Impact Teacher by the Florida Department of Education. As a teacher, she worked with her administrative team to develop programs including a school-wide PBIS initiative and a SciGirls program to encourage young women's interest in STEM fields. She also sponsored several extra-curricular programs for students, including Science Fair and Cheerleading.

Ms. Crumpler has extensive experience in both the public sector and private sector, including local and state government, grant-funded institutions, and non-profits. She demonstrates strength in customer service, data analysis, and strategic planning.

Some of the recent public sector projects that Ms. Crumpler has been involved with include: a Classification and Compensation Study for the School Board of Bay County, FL; Compensation Structure and Framework for the School Board of Lee County, FL; a Compensation Study for the Brevard County Tax Collector, FL; a Classification and Compensation Study for Walton County, FL; a Classification and Compensation Study for the City of West Melbourne, FL; a Compensation Study for the School Board of Sarasota County, FL; a Compensation Study for the Marion County Hospital District, FL; and a Classification and Compensation Study for the City of Coral Gables, FL; a Classification and Compensation Study for Henry County, GA; a Classification and Compensation Study for the Bibb County School District, GA; Job Architecture Consulting for HR for the Savannah-Chatham County Public School System, GA; a Compensation Study for Rutherford County Schools, TN; a Comprehensive Comp Study for Fayette County Public Schools, KY; a Classification and Compensation Study for Carbon County, PA; a Compensation Study for Saint Paul Public Schools, MN; a Compensation Study for the East Orange School District, NJ; Compensation Study for New Horizons Regional Education Centers, VA; a Compensation Study and a Classification Analysis for Accomack County Public Schools, VA; a Classification and Compensation Study for Culpeper County, VA; a Classification and Compensation Study for Charlottesville City Schools, VA a Compensation Study for Cabarrus County Schools, NC; a Compensation Strategy Review and Classification Study for the Town of Clayton, NC; a Compensation and Benefits Study for Transylvania County, NC; Job Description Review and Salary Study for the Florence County School District Three, SC; a Classification and Compensation Study for School District 5 of Lexington and Richland Counties, SC; an Employee Compensation and Pay Classification Study for the City of Rock Hill, SC; a Compensation Study for Texas Wesleyan University; and a Class and Comp Study and Staffing Analysis for the City of Harlingen, TX; and a Job Analysis, Classification and Compensation Study for the Davis School District, UT.

B.3 Narrative Record of Past Experience

Ms. Crumpler has a Master's of Science in Curriculum and Instruction with a focus on Secondary Science Education from Florida State University. She received her teaching credentials from Florida State University and also holds a Bachelor's degree in Chemistry from Florida State University.



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

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 47 states throughout the country since our company's inception in 2004.

Exhibit B-2 includes a list of 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. **Note:** Evergreen has also conducted over 200 similar studies in the State of Florida.

Note: There has not been in any litigation or regulatory action filed against Evergreen Solutions in the last three years.

Exhibit B-2

List of Selected School District Clients

Dayton Public Schools, OH	Roanoke County Public Schools, VA	Savannah-Chatham County School Board, GA
Cleveland Metropolitan School District, OH	Stafford County Public Schools, VA	Caddo Parish School District, LA
Toledo Public Schools, OH	Bedford County Public Schools, VA	Atlanta Public Schools, GA
Akron Public Schools, OH	Charlottesville City Schools, VA	DeKalb County Schools, GA
Fayette County Public Schools, KY	Danville Public Schools, VA	Douglas Public Schools, GA
Rutherford County Schools, TN	Pittsylvania County Schools, VA	Sumter County Schools, GA
Knox County Schools, TN	Caroline County Public Schools, VA	Bibb County School District, GA
Minneapolis Public Schools, MN	Campbell County Public Schools, VA	Dothan City Schools, AL
Saint Paul Public Schools, MN	Loudoun County Public Schools, VA	Tuscaloosa City Schools, AL
Stillwater Area Public Schools, MN	Manassas City Public Schools, VA	Florida Virtual School
School District of Beloit, WI	Floyd County Public Schools, VA	Leon County Schools, FL
Grand Rapids Public Schools, MI	Goochland County Public Schools, VA	Orange County Public Schools, FL
School District of Philadelphia, PA	Surry County Public Schools, VA	Pinellas County School District, FL
Wissahickon School District, PA	Fairfax County Public Schools, VA	Hillsborough County School District, FL
Hamilton-Wenham Regional School District, MA	Colonial Height Public Schools, VA	Miami-Dade County Public Schools, FL
Needham Public Schools, MA	Henry County Public Schools, VA	Broward County Public Schools, FL
Everett Public Schools, MA	Harrisonburg City Public Schools, VA	Okaloosa County School District, FL
Portland Public Schools, ME	Spotsylvania County Public Schools, VA	Brevard County School District, FL
Manchester Public Schools, CT	Powhatan County Public Schools, VA	Escambia County School District, FL
Nowalk Public Schools, CT	Beaufort County School District, NC	Monroe County School District, FL
School Administrative Unit #29, NH	Lincoln County Schools, NC	St. Lucie County School District, FL
Hopatcong School District, NJ	Duplin County Public Schools, NC	Sarasota County Public Schools, FL
East Orange School District, NJ	Davie County Public Schools, NC	Martin County School District, FL
Jefferson County Schools, WV	Lee County Public Schools, NC	Lee County School District, FL
Virginia Beach City Public Schools	Burke County School District, NC	Bay District Schools, FL
Botetourt County Public Schools, VA	Alamance-Burlington School System, NC	Los Angeles Unified School District, CA
Chesapeake Public Schools, VA	Halifax County Public Schools, NC	Seattle Public Schools, WA
Lee County Public Schools, VA	Chapel Hill-Carrboro City Schools, NC	Blaine County School District No. 61, ID
Prince George County Public Schools, VA	Nash-Rocky Mount Public Schools, NC	Albuquerque Public Schools, NM
Salem City Schools, VA	Chatham Public Schools, NC	Gadsden Independent School District, NM
York County School Division, VA	Currituck County Schools, NC	Davis School District, UT
Mecklenburg County Public Schools, VA	Cabarrus County Schools, NC	Ogden City School District, UT
Covington City Public Schools, VA	Richland County School District One, SC	Wayside Public Schools, TX
Alleghany County Public Schools, VA	Richland County School District Two, SC	El Paso Independent School District, TX
Martinsville City Public Schools, VA	Horry County Schools, SC	Irving Independent School District, TX
Suffolk Public Schools, VA	Rock Hill Schools, SC	Denver Public Schools, CO
Culpeper County Public Schools, VA	Pickens County Schools, SC	Tipton and Clinton Public Schools, OK
Montgomery County Public Schools, VA	School District 5 of Lexington and Richland Counties, SC	Wewoka and Little Axe Public Schools, OK
Clarke County Public Schools, VA	Orangeburg County School District, SC	Liberty Public School District #53, MO
Williamsburg-James City Co. Public Schools, VA	Marlboro County School District, SC	Springfield R-12 School District, MO
Accomack County Public Schools, VA	Florence County School District 3, SC	Kansas City Public Schools, MO

Section C
Approach to Service Delivery



C. *Approach to Service Delivery*

In this section, we include our approach and methodology for conducting a District-Wide Classification and Compensation Study for Leon County Schools (District); a detailed work plan—identifying the tasks, activities, and milestones necessary to accomplish the deliverables required in the scope of the work of the Request for Proposal; a proposed timeline; our quality control measures; and a list of similar K-12 studies we have conducted. **Note:** We have attached a sample final report for a similar study we conducted.

C.1 Approach and Methodology

Evergreen Solutions is uniquely qualified to conduct a District-Wide Classification and Compensation Study for the 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 District's designated Project Manager, Project Committee, and the Human Resources Department throughout the process to ensure constant communication of issues, concerns, and potential outcomes. We work closely with your staff to gain a solid understanding of your current operational realities, challenges, and desired outcomes. Moreover, Evergreen will work with you to balance your need to meet your performance goals while carefully managing your resources.

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



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

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

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

Kick Off Meeting

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

- finalizing the project work plan;
- identifying milestone and deliverable dates;
- gaining insight into the management structure and approach;
- collecting classification, 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 compensation and classification data.

Communication Plan

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

Employee Orientation and Focus Groups

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



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.

Job Assessment Tool and Management Issue Tool

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.

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:

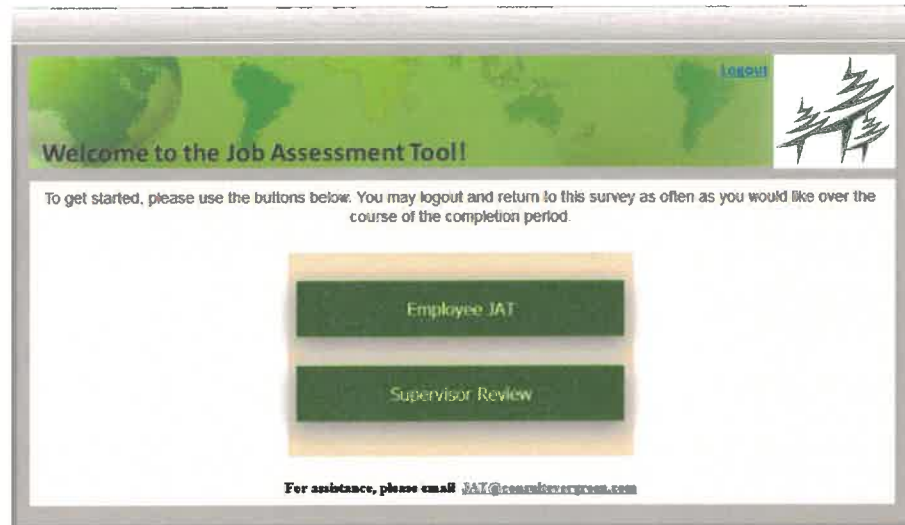
- scope of duties;
- complexity of work;
- supervision received and exercised;
- physical requirements;
- financial responsibilities;
- analytical/mental requirements;
- knowledge and skills required for the job; and
- level of responsibility/reporting relationships.

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



Exhibit C-1 Supervisor's JAT Home Screen



Source: Evergreen Solutions, 2023

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



Exhibit C-2

Job Description and Responsibilities

Basic Job-Related Information

Job Introduction

Briefly provide an overview of your job, including a description of the purpose of your job and the type of work you do. This may be the same as the introduction to your current job description, but it does not need to be.

Description

1
2000

Type of Work

Please select the level that best describes the type of work you perform.

Type of Work

- ☐ Clerical/Admin - Performs a variety of office and administrative support duties OR unskilled, labor-intensive tasks
- ☐ Labor/IT/Trade-Based Occupations - Performs work necessitating repetitive operations with their hands, physical skill and energy
- ☐ Technical/Paraprofessional - Performs tasks requiring a solid understanding of basic algebra and statistics OR use of basic equipment
- ☐ Administrator - Performs tasks directly related to the management or general business operations. Exercises discretion and judgment with matters of significance.
- ☐ Management/Professional - Performs tasks requiring advanced knowledge, which is predominantly intellectual in nature, OR tasks related to the control or administration of part of the organization
- ☐ Executive/Advanced Professional - Performs tasks related to managing the organization, or managing a department OR positions with requiring highly advanced knowledge

Education and Experience

Please select the level that best describes how much education and experience a new-hire should be required to have for your position.

Education -Select One-

Experience -Select One-

Licenses and Certifications

Please list any licenses, certifications, or professional designations you believe should be required or preferred for your position.

Required

1
255

SAVE

Source: Evergreen Solutions, 2023

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



Exhibit C-3 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	600	<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, 2023

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,



	<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>
Job Evaluation	<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>
Compensation	<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>
Market and Benefits Surveys	<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> <p>In addition, a benefits survey will also be administered in tandem with the market survey. Special consideration can be given to selecting highly competitive, market-driven positions if necessary.</p>



Benchmarks	<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 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.</p>
Targets	<p>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.</p> <p>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.</p> <p>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.</p> <p>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 is received, they are cleaned, validated, and summarized. A separate report is issued that shows the results of the salary survey.</p>
Unifying the Solution	<p>After determining the appropriate division of work and market position, a 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.</p>



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

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

Compensation Administration Guidelines

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

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

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

System Maintenance

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

Based on client needs and industry best practices, Evergreen has developed a compensation and classification maintenance tool to assist our clients with implementing, managing, and updating the solutions: **JobForce Manager**. This tool allows our clients to estimate future pay plan changes, update market information, make determinations on reclassifications, and create new jobs. By automating these tasks, **JobForce Manager** allows our



clients to not only streamline, but also increase the fairness and transparency of regular compensation and classifications tasks after solution implementation.

Exhibit C-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 C-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	
Accounting Specialist II	ESP	212.5	\$30,100.27	\$31,220.80	\$31,508.68	105	\$22,702.21	\$31,508.68	\$40,313.17	/ Edit
Accounting Specialist III	ESP	281.3	\$38,058.27	\$34,279.43	\$40,213.86	110	\$28,974.42	\$40,213.86	\$51,463.51	/ Edit
Accounting Specialist IV	ESP	306.3	\$42,313.73	\$40,186.80	\$44,335.80	112	\$31,944.28	\$44,335.80	\$56,727.50	/ Edit
Accounting Supervisor	ESP	500.0	\$67,561.02	\$69,350.91	\$68,779.88	121	\$49,356.08	\$68,779.53	\$86,002.97	/ Edit
Acquisition Specialist	ESP	306.3	\$42,313.73	\$41,085.80	\$44,335.80	112	\$31,944.28	\$44,335.80	\$56,727.50	/ Edit
Administrative Aide	ESP	312.5	\$43,130.09	\$36,824.74	\$44,335.80	112	\$31,944.28	\$44,335.80	\$56,727.50	/ Edit
Administrative Recording Secretary	Professional	381.3	\$52,088.10	\$40,984.20	\$58,245.16	212	\$46,096.13	\$58,245.16	\$68,894.18	/ Edit
Administrative School Secretary I	ESP	208.3	\$29,285.81	\$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	\$35,986.59	\$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	\$27,894.68	\$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	208.3	\$29,285.81	\$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	\$33,819.04	\$34,738.33	107	\$25,029.19	\$34,738.33	\$44,447.48	/ Edit
Administrative Secretary II	ESP	231.3	\$32,543.36	\$33,819.04	\$34,738.33	107	\$25,029.19	\$34,738.33	\$44,447.48	/ Edit
Administrative Secretary III	ESP	256.3	\$35,800.82	\$35,871.01	\$38,299.01	109	\$27,894.68	\$38,299.01	\$49,003.35	/ Edit
Administrative Specialist	Professional	231.3	\$32,543.36	\$43,782.63	\$39,422.62	204	\$31,338.08	\$39,422.62	\$47,207.14	/ Edit
Administrative Specialist-School Food Services	Professional	275.0	\$36,243.91	\$42,861.08	\$45,636.61	207	\$36,509.29	\$45,636.61	\$54,763.93	/ Edit

Source: Evergreen Solutions, 2023



C.2 Detailed Work Plan

The detailed work plan that Evergreen proposes to use to conduct the District-Wide Classification and Compensation Study for the District is provided in this section. Evergreen understands the District has approximately 116 Administrators (i.e., Principals and Asst. Principals), 231 Exempt Employees, 1,021 Support Staff, and 489 Local 1010 Employees that represent 180 classifications that will be included in the study.

Our work plan consists of the following 11 work tasks:

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

Task 1.0 Project Initiation

TASK GOALS

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

TASK ACTIVITIES

- 1.1 Discuss with the District's Project Manager, and any other key personnel (Project Committee) 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



**Task 2.0
Evaluate the Current
System**

- 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 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; benefits information; 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.

KEY PROJECT MILESTONES

- Comprehensive project management plan
- Comprehensive database of District support professional and substitute support staff

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 pay plan(s) and structure for the District. Address any pay compression issues that may exist and recommend resolution strategies.



Task 3.0
Collect and Review
Current Environment
Data

- 2.3 Recommend any changes needed to the current compensation strategy and discuss with the District's Project Manager.
- 2.4 Review current pay practices, frequency, position longevity, etc., in order to make recommendations for any changes needed after the collection and analysis of the market data.
- 2.5 Complete an assessment of current conditions that details the pros and cons of the current system, taking into account the current benefit package as part of total compensation, 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 department directors 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 (up to 60%) to obtain additional relevant information and statistical/anecdotal data on specific compensation issues and policies.
- 3.4 Work with the District's Project Manager and Human Resources staff to administer the JATs and MITs. Our staff utilizes a web-based tool for data collection, but we can provide paper copies as well as those for classifications without computers or Internet access. We will seek approval from the District's Project Manager before distribution of the JAT/MIT questionnaire.
- 3.5 Review any data provided by the District that may provide additional relevant insight.



**Task 4.0
Evaluate and Build
Projected
Classification Plan
and Make FLSA
Determinations**

KEY PROJECT MILESTONES

- Job assessment tool distribution
- Department director interviews
- Employee focus groups and orientation sessions

TASK GOALS

- Identify the classification of existing positions utilizing the approved method for job evaluation.
- Characterize internal equity relationships within the District.

TASK ACTIVITIES

- 4.1 Ensure that the draft class specifications included in the study are provided to Evergreen by the District's Project Manager.
- 4.2 Review the work performed by each classification and score based on job evaluation. Include an evaluation of supervisory comments.
- 4.3 Review job evaluation scores and identify the classification of positions.
- 4.4 Schedule and conduct additional follow-up with employees for jobs where uncertainty exists over data obtained from job evaluation.
- 4.5 Develop preliminary recommendations for the classification structure and discuss with the 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 job evaluation scores for each classification. Essentially, a structure of classifications would be established, and classifications with similar scoring would be grouped and spacing between jobs would be determined.
- 4.6 Develop recommendations of FLSA (exemption) status based on results of the job evaluation (JAT) review and federal requirements.
- 4.7 Review all recommendations with the District's Project Manager.

KEY PROJECT MILESTONES

- Job evaluation scores by class
- Recommended classification changes
- Recommended FLSA status
- Preliminary job structure based on internal equity



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

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 identify the 180 classifications to use as benchmarks for the salary and benefits 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 and benefits survey. **Note:** Evergreen will work with the District's Project Manager to select up to 20 targets for the salary and benefits survey, to include, at a minimum, the following in Florida: Bay County Public Schools; Okaloosa County Public Schools; Santa Rosa County Public Schools; Escambia County Public Schools; Alachua County Public Schools; and St. Johns County Public Schools.
- 5.4 Develop a preliminary list of organizations for the external labor market survey of salary, placing a comparative emphasis on characteristics such as:
 - size of the organization;
 - geographic proximity to the Tallahassee 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 surveys.
- 5.7 After approval of survey methodology, develop contact list of peer organizations and notify peers of impending surveys.

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



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

TASK GOALS

- Conduct the external labor market salary survey.
- Conduct benefits survey.
- Provide a summary of the market salary and benefits 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 survey.
- 6.2 Develop a listing of the current benefits provided by the District for comparisons with peer organizations.
- 6.3 Using the list of District provided benefits and major benefits offerings not provided by the District develop a list of benefits to include in the external labor market survey.
- 6.4 Prepare benefits survey to be included with salary survey developed in **Task 6.1**.
- 6.5 Contact the targets for electronic completion of the survey. Provide paper copies by fax, if requested.
- 6.6 Conduct necessary follow-up through e-mails, faxes, and phone calls.
- 6.7 Collect and enter survey results into Evergreen's electronic data analysis tools.
- 6.8 Validate all data submitted.
- 6.9 Develop summary report of external labor market salary and benefits assessment results.
- 6.10 Submit summary report of external labor market salary and benefits assessment results to the District's Project Manager.

KEY PROJECT MILESTONES

- Market survey instrument
- Benefits survey instrument
- Summary report of external labor market salary and benefits 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 included employees, providing issue areas and preliminary recommendations for strategic improvement.

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 pay plan(s) for the District.
- 7.3 Provide recommendations on pay delivery processes related to steps and longevity, base wage increases, and maximum/minimum wage increases.
- 7.4 Provide recommendations for compensation structures/rules to maintain market competitiveness and prevent future compression.
- 7.5 Produce a pay plan(s) for the District that meets its needs from an internal and external equity standpoint.

KEY PROJECT MILESTONES

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

**Task 8.0
Conduct Solution
Analysis**

TASK GOALS

- Analyze survey results for the benchmark positions
- Slot classifications in the recommended pay plan(s).
- Propose several possible options for implementation of the revised/new pay system.

TASK ACTIVITIES

- 8.1 Use a market-based approach, or other appropriate techniques, to properly slot each classification into the proposed pay scale.
- 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.



Task 9.0
Develop and Submit
Draft and Final
Reports

- 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 Discuss with the District's Project Manager to discuss the potential solutions.
- 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 District-Wide Classification and Compensation Study to Leon County Schools.
- Present the Final Report.

TASK ACTIVITIES

- 9.1 Produce a comprehensive draft report that captures the results of each previous step, including a complete listing of the allocation of job classes to salary range requirements. Provide the District's Project Manager and Project Committee a draft final report for review that will include all costs associated with all recommendations as well as implementation strategies.
- 9.2 Make edits and submit necessary hard copies of the Final Report to the District's Project Manager.
- 9.3 Present the Final Report to the School Board.
- 9.4 Develop a communication plan for sharing study results with select employees of the District.
- 9.5 Develop a plan for maintaining recommendations over time.

KEY PROJECT MILESTONES

- Draft and final reports
- Final presentation



Task 10.0
Develop
Recommendations
for Compensation
Administration

- Communication plan
- Implementation and maintenance database

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



Task 11.0
Provide Updated
Class Descriptions

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 any necessary changes to the class description format with the District's Project Manager.
- 11.3 Update classification descriptions based on data gathered from the job evaluation process to produce accurate, and legally defensible job descriptions.
- 11.4 Create new class descriptions based on Evergreen's proposed classification structure by leveraging data from the job evaluation process, if available.
- 11.5 Recommend a systematic, regular process for reviewing class descriptions.

KEY PROJECT MILESTONES

- Updated class descriptions
- New class descriptions, as needed
- Recommendations for regular review of class descriptions

C.3
Proposed
Timeline

Evergreen possesses the ability, staff, skills, and tools to conduct a City-Wide Classification and Compensation Study for Leon County Schools (District) in five months of the project start date and execution of a contract. This timeline is based on a tentative start date of March 1, 2024, and a completion date of July 31, 2024.

Our proposed timeline, as identified in **Exhibit C-5**, can be modified in any way to best meet the needs of the District.



Exhibit C-5 Proposed Timeline

PROJECT TASKS	2024				
	MAR	APR	MAY	JUN	JUL
1.0: Project Initiation	■				
2.0: Evaluate the Current System	■				
3.0: Collect and Review Current Environment Data	■				
4.0: Evaluate and Build Projected Classification Plan and Make FLSA Determinations		■	■		
5.0: Identify List of Market Survey Benchmarks and Approved List of Targets			■		
6.0: Conduct Market Salary and Benefits Survey and Provide External Assessment Summary			■	■	
7.0: Develop Strategic Positioning Recommendations				■	
8.0: Conduct Solution Analysis					■
9.0: Develop and Submit Draft and Final Reports					■
10.0: Develop Recommendations for Compensation Administration					■
11.0: Provide Updated Class Descriptions				■	■

C.4 Quality Control Measures

Evergreen's organizational structure is designed to provide a multiple tier approach to quality control that involves the Project Consultants, Project Director, and the Project Principal. All consultants review materials throughout the project and participate in any corrective activities that may be necessary. The Project Principal has contractual authority over the project and makes sure that project milestones are delivered on time. The Project Director manages the overall project, communicates the progress of the study to the client, and reviews and delivers the final report.

We at Evergreen Solutions pride ourselves on providing continuity of service and implementing quality control procedures to ensure a successful study. Our workload is never too heavy so as to compromise the quality of any project we are on contract to complete or place undue stress on our project team. We believe in providing the most professional and highest quality services to our postsecondary clients. Our consultants are dedicated to putting the necessary time and effort into every project to make sure all required tasks and activities are delivered within specified time frames.

Should Evergreen Solutions be awarded this contract we give you our word that our consultants will be available to District staff whenever they are needed to answer any questions regarding project deliverables. We are committed to do the very best job we can for you so that once the project is completed your staff will feel that we have given them the highest quality of service in a timely fashion.



C.5 Select Relevant K-12 Experience

Because Evergreen has conducted more than 1,200 classification and/or compensation related studies since 2004, we have provided in this section only a sample of some of our similar work with K-12 clients. **Note:** Because of our extensive public sector experience, especially with school districts, we are well familiar with working in unionized environments.

Classification and Compensation Study School Board of Bay County, Florida

Evergreen Solutions is retained by the School Board of Bay County to conduct a Classification and Compensation Study. Evergreen will conduct a comprehensive district-wide classification and compensation. The scope of work shall include a comprehensive compensation market survey, job analysis and evaluation, evaluation of internal and external compensation equity, outlining measured and achievable courses of action for possible implementation to include a revised pay schedule, and preparation of any required reports.



District-Wide Compensation Study School Board of Marion County, Florida

Evergreen is retained by the School Board of Marion County to conduct a District-Wide Compensation Study. Evergreen will perform the following tasks:

- conduct an internal comprehensive job evaluation and external comparison for applicable positions;
- compare and analyze salaries and wages of like or similar jobs of comparable public-school districts and state organizations with similar positional or organizational characteristics;
- evaluate existing compensation structure and provide change recommendations as appropriate;
- conduct a review between the job title and responsibilities; and
- provide recommendations relative to the educational background of the employee by position.



**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.



**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 Structure and Framework
School District of Lee County, Florida**

Evergreen Solutions is retained by the School District of Lee County to provide a Compensation Structure and Framework. The project will determine if the salary schedules of all employee groups are competitive with other school systems and the market in general, identify any existing classification problems, recommend necessary changes to correct identified problems, recommend options for implementation of a plan to correct existing problems, and provide tools to allow the District to conduct periodic reviews of market data beyond the initial comprehensive study.



**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.



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 recommend 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.



HR Department Policy Review Atlanta Public Schools, Georgia

The Atlanta Public Schools contracted with Evergreen Solutions, LLC to conduct a review of specific human resources policies within the school system. The policy review was confined to two specific policies— (1) the policy governing the hiring of personnel and crediting for years of service by hiring into the range of the position; and (2) the policy governing the promotion of staff and the upward grade and range movement awarded to employees within the school system upon promotion. In conducting this study for the school system, Evergreen Solutions was tasked with the following:

- analyzing the current hiring and promotion policies in place within APS as they relate to both certified staff (teachers and instructional personnel) and non-certified staff (administrative and classified personnel);
- obtaining anecdotal data on the strengths and weaknesses of the current policies from both human resources staff and employees within the school system;
- determining the market competitive position of these policies with larger districts within the Metropolitan Regional Education Service Agency;
- determining the competitiveness of these policies as compared to large, progressive, urban school systems throughout the United States;
- identifying a fair, practical, and fiscally responsible solution for the school system to amend their current hiring and promotion policies; and
- providing specific implementation recommendations for both the hiring and promotion policies within the Atlanta Public Schools.



Atlanta Public Schools, Georgia Review of Superintendent Salaries

The Atlanta Public Schools contracted with Evergreen Solutions, LLC to conduct a review of the salaries of selected Superintendents in comparable school districts throughout the country.



Compensation and Classification Study Sumter County Schools, Georgia

Evergreen Solutions 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. Evergreen assessed both internal and external equity of the school system'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 Manager** 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
Bibb County School District, Georgia**

Evergreen Solutions was retained by the Bibb County School District to conduct a Classification and Compensation Study. Evergreen conducted a job analysis of classified staff and collect market data of comparable school districts to develop appropriate position specifications and salary ranges with a tiered career pathway for the Bibb County School District.



**Compensation Structure and Framework
Savannah-Chatham County Public School System, Georgia**

Evergreen Solutions is retained by the Savannah-Chatham County Public School System (SCCPSS) to provide Job Architecture Consulting for HR. Evergreen will review and provide an in-depth, detailed recommendation regarding an appropriate tiered career pathway for SCCPSS. Additionally, Evergreen will modify, update, and develop position specifications for all identified non-teaching positions in the organization compliant with applicable local, state and federal laws and regulations, as well as policies of the SCCPSS Board of Education.



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.



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.



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

Evergreen Solutions was again 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.

Note: Evergreen was again hired in early 2022 to conduct an update of the District's Classification and Compensation Plan.



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

Evergreen Solutions was retained by the Springfield R-12 School District to conduct a Compensation and Benefits Study. Evergreen conducted 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 also compared the District's extra-duty salaries to peer organizations. Evergreen conducted an internal equity analysis by reviewing employee job descriptions and made recommendations for new job descriptions and/or updates to existing job descriptions according to the function each employee actually performed compared to their stated job description. Evergreen further determined if there were compression or inequity issues and, if so, made recommendations for improvements.



Compensation and Pay Classification Plan Study Raytown C-2 School District, Missouri

Evergreen Solutions was engaged with the Raytown C-2 School District to conduct a Compensation and Pay Classification Plan Study. The objectives of the study were to conduct and implement a total compensation plan structure for the District's workforce which will provide both internal and external equity;



length of work calendar; establish a classification system that accurately describes the duties, knowledge, skills, abilities and minimum qualifications required for each job classification; determine and implement a program of accurate job descriptions based on job analysis; and develop a maintenance program for job descriptions and classification recommendations. Evergreen's consultants will perform a comprehensive, valid and reliable job analysis/evaluation of each job class within the District for the purpose of determining if the District's current pay grade levels for all of the District's positions are still valid. In addition, Evergreen conducted a comprehensive wage and salary market survey for the purpose of ensuring that the District's pay plan and pay structure possessed external equity and labor market competitiveness.



Compensation Study Kansas City Public Schools, Missouri

Evergreen Solutions was engaged with Kansas City Public Schools to conduct a Compensation Study. Evergreen's consultants performed the following tasks:

- completed onsite interviews with Human Resources Team and employees performing studied job functions, in order to fully understand the operational structures and reasoning behind classification of each job position, as needed;
- evaluated and determined which job positions fell within an administrator category, supervisor category, and non-supervisory category;
- reviewed all employee job descriptions and made 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;
- compared all employee salaries to internal and external markets;
- determined whether there were compression or inequity problems and made recommendations for improvements;
- compared all employee benefits packages to the external markets, determine whether there were inequity problems and made recommendations for improvements;
- provided recommendations for supervisor and non-supervisor level salary schedules and/or ranges; and
- provided recommendations on implementing a tool or system that could be used in classifying new and/or future classified level positions.



Compensation and Classification Study Rutherford County Schools, Tennessee

Evergreen Solutions is retained by the Rutherford County School Board to conduct a Compensation and Classification Study. Evergreen's consultants will identify and recommend appropriate labor markets, collect market salary data, and propose recommendations to both address current and future wage compression and will propose a revised pay plan for classified and certified staff. Evergreen will further conduct a job analysis to determine internal equity and will update job descriptions, as needed. **Note:** This project is nearing completion.



Compensation Study Consultant Services Knox County Schools, Tennessee

Evergreen Solutions was hired by Knox County Schools to provide Compensation Consultant Services. Evergreen will determine market ranges for compensation across job families. Comparisons for determining the market ranges will also not be limited to only public schools but also include private and public entities. An evaluation of current salary schedules and procedures, including but not limited to contract lengths and movement between scales, will be conducted as well as an assessment of the School's total compensation package, including benefits and costs passed on to the employee, annual leave, and paid and unpaid holidays.



Comprehensive Compensation Study and Staffing Study Fayette County Public Schools, Kentucky

Evergreen Solutions was engaged with Fayette County Public Schools to conduct a Comprehensive Compensation Study as well as a Staffing Study. Evergreen performed the following tasks: reviewed job descriptions and conducted a job analysis with employees; determined adequate staffing at the district level for operational and support areas and made recommendations to assure external competitiveness and internal equity; made recommendations for adjustments to assure internal equity and external competitiveness; assigned compensatory value to various program certificates (ex. Certified Educational Office Employee, Child Development Associate Certificate, Automotive Service Excellence Certification, etc.); performed analysis of fiscal impact of implementing proposed changes as well as a proposed implementation schedule; assisted in developing a communication plan for any changes being implemented; provided documentation and related tools to the District to independently maintain any strategies implemented; and presented findings to the Superintendent and the FCPS Board of Education.



Compensation Study Fayette County Public Schools, Kentucky

Evergreen Solutions was again engaged with Fayette County Public Schools to conduct a Compensation Study for Salaried Employees. The study was used to determine: appropriate compensation for duties/responsibilities and recommendations for appropriate salary ranges for all salaried positions; potential pay compression issues and alternative solutions; analysis of compensation for extra duties for extra- and co-curricular activities, as well as professional staff duties such as department chairs and staff development; an evaluation of the various work calendars for certified and classified salaried positions; administrative salary structure and criteria for determining the appropriate administrative additive for various levels of leadership; evaluation against benchmark peers including other school districts, other governmental and/or educational entities and like-sized industry, both local and state market conditions; an evaluation to update and/or create job descriptions as needed to uniformly reflect distinguishing characteristics, essential job functions, minimum qualifications and level of education, and licensing and certification requirements.



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.



Classification, Compensation, and Total Staff Rewards Consulting School District of Beloit, Wisconsin

Evergreen Solutions was engaged with the School District of Beloit to provide Compensation and Total Staff Rewards Consulting. Evergreen's consultants provided the following: consultation and expertise in the implementation and design of a sustainable compensation plan(s) allowing the School District of Beloit to remain market competitive in salary structures and total rewards packages; objective and unbiased solutions for District challenges around compensation; consultation on "right sizing" spans of control with leadership positions; consultation on creating a process for equity pay reviews; consultation on policy development to guide the HR Department to effectively administer compensation plan(s); and training and coaching around compensation plan(s). Evergreen also performed a job analysis and updated job descriptions as needed.



Limited Classification and Compensation Study Grand Rapids Public Schools, Michigan

Evergreen Solutions was engaged with Grand Rapids Public Schools to conduct a Limited Classification and Compensation Study. The purpose of this study was to examine all non-unionized exempt and support non-exempt salaries and job classifications to validate classification content, compensation levels and determine market position. This comprehensive salary and job classification study helped ensure that the District was offering a salary and benefits package that was competitive with the public labor market for fully qualified employees when compensation comparisons were made. It will also ensure that job descriptions consistently reflected actual work duties. The study also assisted the District in employing and retaining a high quality, motivated workforce.



Compensation Study Saint Paul Public Schools, Minnesota

Evergreen Solutions was retained by Saint Paul Public Schools to conduct a Compensation Study. Evergreen conducted an external analysis of the SPPS pay and benefits (salary, health benefits, premium sharing, paid leave, retirement benefits, education benefits, etc.) for a set of roles associated with specific groups and bargaining units for internal parity (roughly 250 staff representing 5 groups or units). Analysis included an internal review for parity, a review against comparable K-12 education systems, and a review against related industries outside of K-12 education. Evergreen further conducted a job analysis to determine internal equity and revised job descriptions accordingly. **Note:** Evergreen was again hired in 2023 to conduct a Classification Study.



**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.



**Compensation Study
Chesapeake Public Schools, Virginia**

Evergreen was retained by Chesapeake Public Schools to conduct a Compensation and Classification Study. Evergreen evaluated the current system and environment data, reviewed and identified appropriate market benchmarks and targets, and conducted an external market survey. Evergreen assessed the appropriateness of salaries and job positions for the employees of the schools and developed strategic positioning recommendations. Evergreen also reviewed total compensation administration, identified potential pay compression and/or inequities (both internally and to the market), and provided recommendations.



**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;



-
- 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 (DCSD) 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 DCSD peers, and provided recommendations for changes to the DCSD 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).



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 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 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.



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.



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 Colonial County Public Schools, Virginia

Evergreen Solutions was engaged with Colonial Heights Public Schools to conduct a Compensation Study. Evergreen's consultants conducted a market salary survey of peers and used the results to revise the Division's compensation plan for all employees in order to ensure that the Division is externally competitive in the market.



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.



Pay Plan Study Salem City Schools, Virginia

Evergreen Solutions was retained by Salem City Schools to review the pay scales (i.e., teacher scale, support staff scale, administrator scale, extra-curricular activity scale), salary supplements, and VHSL (Va. High School League) coaching factors. Evergreen examined the following:



Existing Salem Teacher Scale

- conducted a salary survey and compare Salem salaries to comparable school divisions that were mutually identified and any relevant databases available;
- provided comparison to others in the region/comparable school divisions and alternatives for compensating special education employees at a higher rate of pay; and
- researched and provided survey data and recommendation for a competitive benefits package to offer to employees.

Existing VHSL (VA High School League) Coaching Supplements

Evergreen further determined if existing model provided competitive coaching supplements with similar school divisions and made recommendations, if any.

Existing Administrator Scale

- conducted a salary survey and compared Salem salaries to comparable school divisions that were mutually identified and also any relevant databases available;
- specifically looked at equity of days worked and responsibilities; and
- researched and provided survey data and recommendation for a competitive benefits package to offer to employees.

Extracurricular Activities Scale and Miscellaneous Salary Supplements

- conducted a salary survey and compared Salem salaries to comparable school divisions that were mutually identified and also any relevant databases available.

Existing Classified Pay Scale

- conducted a salary survey and compare Salem salaries to comparable school divisions and/or relevant local private companies that were mutually identified and also any relevant databases available;
- specifically looked at the equity (internal) of placement on scale;
- recommended any enhancements to improve the existing scale;
- provided alternatives for employees who had reached the top of the scale without adding steps;
- provided alternatives for employees who were performing at a level above others such as a "tier I, II, III" model for increased compensation;



-
- provided comparison to others in region/comparable school divisions and alternatives for compensating special education employees at a higher rate of pay; and
 - researched and provided survey data and recommendation for a competitive benefits package to offer to employees.



Classification and Compensation Study Surry County Public Schools, Virginia

Evergreen Solutions was engaged with Surry County Public Schools to conduct a Classification and Compensation Study. Evergreen conducted a job analysis to determine internal equity and conducted a salary survey of peer organizations to determine the competitiveness of the Division salary structure. Evergreen also reviewed and revised job descriptions and made FLSA determinations.



Compensation Study and Classification Analysis Accomack County Public Schools, Virginia

Evergreen Solutions is retained by Accomack County Public Schools to conduct a Compensation Study and Classification Analysis. The following questions will be answered as a result of the study:

- Are employees paid appropriately, as compared to market, for the work they are expected to do? If not, what adjustments are recommended to achieve this?
- Do job titles and descriptions accurately reflect the work that employees are expected to do? If not, what adjustments are recommended to achieve this?
- Is pay equitable across employees in similar positions? What adjustments are recommended to rectify any internal inequities that might be found?
- What, if any, changes are recommended to the overall pay structure to streamline salary scales?
- What, if any, changes are recommended to add clarity and consistency to the process used to place new employees at a fair and appropriate level of pay?



-
- What, if any, changes are recommended for employees who are at the end of their respective salary scale/range?
 - What is the best way for the school division to address this to ensure valued, long-term employees continue to receive raises comparable to what all other employees receive?



Comprehensive Classification and Compensation Plan Dinwiddie County Public Schools, Virginia

Evergreen Solutions was engaged with the Dinwiddie County Public Schools to develop a Comprehensive Classification and Compensation Plan that allowed the Division to: attract and retain qualified employees; ensure positions performing similar work with essentially the same level of complexity, responsibility, and knowledge, skills, and abilities are classified together; provide salaries commensurate with assigned duties; provide recognizable compensation growth; and maintain a competitive position with other comparable school divisions, entities and private employers within the same geographic areas. Evergreen will conduct interviews and/or job audits as appropriate in order to update job descriptions to uniformly reflect the distinguishing characteristics, essential job functions, minimum qualifications (education/experience and knowledge, skills, abilities, working conditions (physical demands, work environment, and travel requirements), and certification/licenses/registrations requirements for classification and will identify Fair Labor Standards Act (FLSA) status (exempt/non-exempt) of each position. In addition, Evergreen reviewed current compensation plan (salary grade levels and steps) and understand current challenges; worked with the Division's Senior Leadership team to identify comparable labor markets including private and public sector employers; developed and conducted a comprehensive compensation survey to include stipends (Instructional and coaching) and degree supplements; and made recommendations.



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;
- 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 was the fourth project Evergreen Solutions has conducted with Chapel Hill-Carrboro City Schools. Evergreen is currently conducting a compensation plan update for classified staff of the District.



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 provided CPS enough information to develop a compensation structure that was is responsive to their stated needs and addressed external equity. Evergreen assessed current payroll conditions by collecting and reviewing in-house data and developing a compensation structure and implementation cost plan based upon those results.



Compensation Study and Analysis Lincoln County Schools, North Carolina

Evergreen Solutions was engaged with Lincoln County Schools (LCS) to conduct a Compensation Study and Analysis. Evergreen's consultants evaluated the current pay plan for LCS as compared to the job market for comparable positions in other school districts, and the private sector, as appropriate. Based on the results of the survey, Evergreen recommended a revised pay plan for LCS.



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.



Classification and Compensation Study Rock Hill Schools, South Carolina

Evergreen Solutions was engaged with the Rock Hill School District (District) to conduct a Compensation and Classification Study. Evergreen's consultants reviewed the current classification and compensation methodology and systems for the District and used our Job Assessment Tool



(JAT) and Management Issues Tool/(MIT) to gather data for recommendations to these systems. A market survey was conducted to gather further data to determine external equity among the District's positions and further recommendations were made. In addition, Evergreen's consultants conducted an Organizational Structure Study to develop comprehensive organizational charts.



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

Evergreen Solutions was hired by the School District of Pickens County 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. Evergreen 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.



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

Evergreen Solutions was retained by the Orangeburg County School District to conduct a compensation and staffing study. The study included 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 also included a review of staffing levels for positions paid from the district's salary schedule, in comparison to demographically comparable school districts.

Essential tasks that were completed in the study included a: 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. Evergreen also conducted a classification study for the District which included a job analysis and update of all job descriptions.



Compensation and Classification Study School District 5 of Lexington and Richland Counties, South Carolina

Evergreen Solutions was retained by School District 5 of Lexington and Richland Counties to conduct a Compensation and Classification Study. Evergreen conducted a thorough and comprehensive review of all aspects of the District's current classification and compensation system and provided recommendations designed to increase the market competitiveness of the District's compensation program within the regional marketplace and provide increased internal equity among positions. Implementation of these recommendations will help the District attract new employees and retain current employees needed to meet the District's needs. Evergreen further developed new classification descriptions, a classification system, a compensation plan, and options for implementing a new compensation program.



Job Description Review and Salary Study Florence County School District Three, South Carolina

Evergreen Solutions was retained by the Florence County School District Three to conduct a Job Description Review and Salary Study. Evergreen's consultants performed the following tasks: reviewed and updates as needed, current district salary schedules, supplemental schedules, and job descriptions for all; conducted a job analysis by meeting with employees of all categories; provided analysis of the district's organizational structure and key positions; gathered and reviewed salary, supplement, and staff level information from no fewer than six demographically comparable South Carolina school districts; provided comparison of Florence County School District Three 's salary schedules, hours worked, and supplemental schedules (athletics, band, etc.) with the comparable school districts; developed recommended salary and supplement schedules for all job categories; and analyzed the placement of current employees on existing salary and supplement schedules, recommended placement of current employees on recommended schedules and calculated the cost of implementing recommended changes.



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 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.



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 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.



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 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.



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 systems 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;
- 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. **Note:** Evergreen was hired in the fall of 2023 to conduct a Classification and Compensation Plan Update for the District.



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

Evergreen Solutions was 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 conducted a job analysis and provided recommendations to update and/or create accurate job descriptions for the selected positions. The analysis included recommendations to condense position descriptions where positions were of the same job family and classification as well as created internal career “ladders” for some positions (e.g., Custodian I, II, Lead Custodian, Custodial Supervisor). Evergreen further conducted an external market study of comparative employers to determine if salaries in all categories were competitive. The study included a compensation plan that focused on internal equity and included guidelines for future new job descriptions and related compensation. In the end, Evergreen recommended a classification and compensation structure that would allow the District attract and retain high caliber employees, and that would employ a clear path of career progression.



**Compensation Consulting Services
Seattle Public Schools, Washington**

Evergreen Solutions was engaged with the Seattle School District No. 1 to provide Compensation Consulting Services. Evergreen collected data from peers using a custom salary survey for a small subset of classifications (i.e., 25) for specialized school curriculum program managers. In addition, Evergreen gathered published public survey data regarding the 260 non-represented staff classifications and analyzed results.



Compensation and Classification Study Rutherford County Schools, Tennessee

Evergreen Solutions is retained by the Rutherford County School Board to conduct a Compensation and Classification Study. Evergreen's consultants will identify and recommend appropriate labor markets, collect market salary data, and propose recommendations to both address current and future wage compression and will propose a revised pay plan for classified and certified staff. Evergreen will further conduct a job analysis to determine internal equity and will update job descriptions, as needed. **Note:** This project is nearing completion.



Compensation Study Consultant Services Knox County Schools, Tennessee

Evergreen Solutions was hired by Knox County Schools to provide Compensation Consultant Services. Evergreen will determine market ranges for compensation across job families. Comparisons for determining the market ranges will also not be limited to only public schools but also include private and public entities. An evaluation of current salary schedules and procedures, including but not limited to contract lengths and movement between scales, will be conducted as well as an assessment of the school's total compensation package, including benefits and costs passed on to the employee, annual leave, and paid and unpaid holidays. **Note:** Evergreen was again hired in 2023 to conduct a Classification Study.



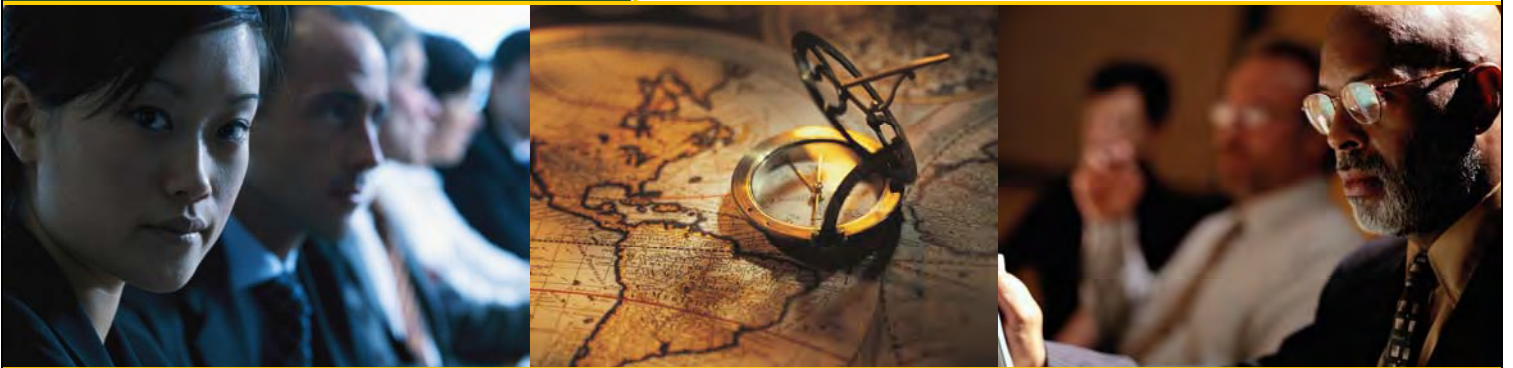
Comprehensive Compensation Study and Staffing Study Fayette County Public Schools, Kentucky

Evergreen Solutions was engaged with Fayette County Public Schools to conduct a Comprehensive Compensation Study as well as a Staffing Study. Evergreen performed the following tasks: reviewed job descriptions and conducted a job analysis with employees; determined adequate staffing at the district level for operational and support areas and made recommendations to assure external competitiveness and internal equity; made recommendations for adjustments to assure internal equity and external competitiveness; assigned compensatory value to various program certificates (ex. Certified Educational Office Employee, Child Development Associate Certificate, Automotive Service Excellence Certification, etc.); performed analysis of fiscal impact of implementing proposed changes as well as a proposed implementation schedule; assisted in developing a communication plan for any changes being implemented; provided documentation and related tools to the District to independently maintain any strategies implemented; and presented findings to the Superintendent and the FCPS Board of Education.



Classification and Compensation Study for Bibb County School District

FINAL REPORT



May 19, 2023

Table of Contents

	PAGE
1.0 INTRODUCTION.....	1-1
1.1 Study Methodology	1-1
1.2 Report Organization.....	1-3
2.0 ASSESSMENT OF CURRENT CONDITIONS.....	2-1
2.1 Analysis of Pay Plans	2-1
2.2 Salary Placement Analysis	2-10
2.3 Quartile Analysis	2-15
2.4 Compression Analysis	2-19
2.5 Department/Location Distribution	2-21
2.6 Summary	2-22
3.0 SUMMARY OF EMPLOYEE OUTREACH	3-1
3.1 General Feedback	3-1
3.2 Compensation	3-3
3.3 Classification.....	3-4
3.4 Summary	3-4
4.0 MARKET SUMMARY.....	4-1
4.1 Market Data	4-3
4.2 Salary Survey Results.....	4-7
4.3 Salary Survey Summary	4-12
5.0 RECOMMENDATIONS	5-1
5.1 Classification System	5-1
5.2 Compensation System	5-3
5.3 Implementation	5-13
5.4 System Administration	5-14
5.5 Summary	5-15



Chapter 1 - Introduction

The leadership of Bibb County School District (the “District”) in keeping with its commitment to attracting and retaining the employees necessary to provide high quality services determined that its current compensation and classification systems and structures needed to be updated to better reflect best practices. Evergreen Solutions, LLC (“Evergreen”) was selected by the District during December of 2022 as its partner to in order to accomplish this goal. This engagement sought to evaluate the strengths and weaknesses of the District’s current systems, conduct a job and pay grade analysis to study internal equity, collect peer salary data to study external equity, and adjust the current compensation and classification systems to better reflect the market. This study and the analysis contained within provides District leadership with valuable information related to their employee demographics, opinions, and market data, as well as internal and external equity.

Internal equity relates to the fairness of an organization’s compensation practices among its current employees. Specifically, by reviewing the skills, responsibilities, and duties of each position, it can be determined whether similar positions are being compensated in an equitable manner within the organization. External equity relates to the differences between how an organization’s classifications are valued and the compensation available in the marketplace for the same skills, responsibilities, and duties. This component of the study aims to address how the District is positioned in the market relative to other local area government organizations with similar positions and to develop recommendations that allow the District to recruit and retain quality employees. The classification component of this study resolves any inconsistencies related to job requirements or job titles and ensures that all jobs are appropriately categorized and aligned with The work currently performed.

1.1 STUDY METHODOLOGY

Evergreen Solutions combines qualitative and quantitative data analysis to produce recommendations that maximize the fairness and competitiveness of an organization’s compensation structure and practices. It is important to note that the data utilized in the study represents a snapshot in time. As market conditions can change rapidly, it is important for the District to conduct regular market surveys to ensure their external market position does not decay. A full compensation and classification review is recommended approximately every three to five years. Some examples of project activities included:

- Conducting a project kick-off meeting
- Providing a video orientation for employees
- Facilitating focus group sessions with employees
- Conducting an external market salary survey



- Developing recommendations for compensation management
- Revising classification descriptions based on employee JAT feedback
- Developing recommendations for compensation and classification changes
- Creating draft and final reports
- Conducting training sessions with human resources staff in the methodology used to systematically assess job classifications

Kickoff Meeting

The kickoff meeting provided an opportunity to discuss the history of the District, finalize the work plan, and begin the data collection process. Data collection included the gathering of relevant background material including: existing pay plans, organization charts, policies, procedures, training materials, classification specifications, and other pertinent material.

Employee Outreach

Through the orientation video, Evergreen briefed employees on the purpose and major processes of the study. This process explained the importance of employee participation in the JAT process.

In addition, employees participated in focus group sessions designed to gather input from their varied perspectives as to the strengths and weaknesses of the current system. Feedback received from employees in this context was helpful in highlighting aspects of the organization which needed particular attention and consideration. This information provided some basic perceptual background, as well as a starting point for the research process.

Job Assessment Tool® (JAT) Classification Analysis

Employees were asked to complete individual JAT surveys, where they shared information pertaining to their work in their own words. These JATs were analyzed and compared to the current classification descriptions, and classifications were individually scored based on employee responses to five compensable factor questions. Each of the compensable factors—Leadership, Working Conditions, Complexity, Decision Making, and Relationships—were given weighted values based on employee responses, resulting in a point factor score for each classification. The rank order of classes by JAT scores was used to develop a rank order of classes within the proposed compensation structure. Combined with market data, this information formed the foundation of the combined recommendations. The nature of each compensable factor is described below:

- Leadership –relates to the employee’s individual leadership role, be it as a direct report of others who have leadership responsibilities, or as an executive who has leadership over entire departments or the District as a whole.
- Working Conditions – deals with the employee’s physical working conditions and the employee’s impact on those conditions, as well as the working conditions impact or potential impact on the employee.



- Complexity – describes the nature of work performed and includes options ranging from entry-level manual or clerical tasks up to advanced scientific, legal, or executive management duties.
- Decision Making – deals with the individual decision-making responsibility of the employees. Are decisions made on behalf of the employee or is the employee making autonomous decisions that impact the individual, other employees, or even the entire organization?
- Relationships – deals with organizational structure and the nature of the employee's working relationships. Responses range from employees who work primarily alone, those who work as members of a team, those who oversee teams, and those who oversee the organization as a whole.

Salary Survey

The external market for this study was defined as identified local government organizations with similar positions as well as similar characteristics, demographics, and service offerings. Specific benchmark positions in the District were surveyed, although not all positions had matching positions at the peer organizations. The data were then analyzed comparing District classifications to the jobs performing the same duties at peer organizations to gain a fuller understanding of their market position.

Recommendations

Evergreen developed recommendations for the District to consider in order to help maximize the effectiveness and efficiency of its current compensation and classification structure. Evergreen provided the District with a variety of recommendations for the future at various costs. Plans ranged from minor tweaks to the current compensation and classification system to wholesale changes to the entire organizational structure. These plans were designed to fix the issues identified in this report, while continuing to build on the strengths the District currently exhibits.

1.2 REPORT ORGANIZATION

This report includes the following additional chapters:

- Chapter 2 – Assessment of Current Conditions
- Chapter 3 – Summary of Employee Outreach
- Chapter 4 – Market Summary
- Chapter 5 – Recommendations

Chapter 2 - Assessment of Current Conditions

An assessment of current conditions was conducted to help Evergreen better understand the current standing of the District pay plans, demographics, and compensation structures. This assessment should be considered a snapshot in time and is reflective of the conditions



present within the District upon the commencement of this study. By leveraging this information, Evergreen was able to gain a better understanding of the strengths and weaknesses of the current compensation system. When combined with the market results, the Assessment of Current Conditions helped provide a basis for recommendations. A full summary of the Assessment of Current Conditions can be found in **Chapter 2** of this report.

Chapter 3 – Summary of Outreach

Outreach was conducted by Evergreen consultants via virtual focus groups as well as a week-long survey, both of which provided Evergreen with solid information to begin the research process.

Employees provided Evergreen their opinions on classifications that were outdated, behind market, or had trouble retaining employees. Information was also provided on the employees' opinions of the biggest competitors to the District. Finally, employees provided information on all the positive aspects of employment with the District. Evergreen used employee opinions as a starting point for some data collection, but everything that was used in the course of this study was independently verified by Evergreen. A full summary of the outreach can be found in **Chapter 3** of this report.

Chapter 4 - Market Summary

A salary survey was designed by Evergreen and approved by the District's human resources department. The external market was defined by Evergreen and approved by the District's human resources department. After the results were received, the data were analyzed to compare the District to the overall results. Combined with the Assessment of Current Conditions, the market survey gave Evergreen the information needed to understand the District's position relative to its labor market. A full summary of the market results can be found in **Chapter 4** of this report.

Chapter 5 – Recommendations

During the recommendations phase, Evergreen provided several different solution options based on their current relationship to market. Solutions were provided that only require minor tweaks to the current compensation and classification systems, as well as some solutions that would require wholesale changes to District's current structures. Evergreen has provided the District with recommendations that can both leverage the current compensation structure and also help expand its ability to recruit and retain talent in the most competitive classifications. A full explanation of the recommendations can be found in **Chapter 5** of this report.



Chapter 2 – Assessment of Current Conditions

Chapter 2 provides an overall assessment of the compensation system in place for Classified employees at Bibb County School District. Data included here reflect the demographics in place at the time of the study and should be considered a snapshot in time. The data provide the baseline for analysis throughout the course of this study, but are not sufficient cause for recommendations in isolation. By conducting this review, Evergreen gained a better understanding of the structure and associated salary practices in place, and identified issues for both further review and potential revision.

2.1 ANALYSIS OF PAY PLANS

The District administers a step plan for 1,472 Classified employees. **Exhibit 2A** provides details related to the value of the pay grade at the minimum, the calculated midpoint, and the maximum; the range spread for each (the distance between the pay range minimum and maximum); and the number of employees in each pay grade, and **Exhibit 2B** illustrates the 13 steps for each of the 61 grades. As can be seen, there is a consistent range spread (13.0 percent) and step progression (1.0 percent) throughout the plan; however, the midpoint progression does vary between 1.0 percent and 15.0 percent between grades.

Note: Twenty-two employees have flat-rate salaries; therefore, they are not assigned to a grade. As such, they are not included in the majority of the tables within this chapter.

**EXHIBIT 2A
PAY PLAN SUMMARY**

Pay Plan	Grade	Minimum	Midpoint	Maximum	Range Spread	Midpoint Progression	Employees
Classified	G009	\$9.74	\$10.36	\$10.98	13%	-	18
Classified	G016	\$11.19	\$11.91	\$12.62	13%	15%	13
Classified	G019	\$11.88	\$12.64	\$13.39	13%	6%	35
Classified	G020	\$12.12	\$12.89	\$13.66	13%	2%	21
Classified	G021	\$12.36	\$13.15	\$13.93	13%	2%	147
Classified	G023	\$12.86	\$13.68	\$14.49	13%	4%	72
Classified	G026	\$13.38	\$14.24	\$15.09	13%	4%	129
Classified	G027	\$13.66	\$14.53	\$15.40	13%	2%	2
Classified	G028	\$13.93	\$14.82	\$15.70	13%	2%	0
Classified	G029	\$14.20	\$15.11	\$16.02	13%	2%	6
Classified	G030	\$14.49	\$15.41	\$16.32	13%	2%	4



EXHIBIT 2A (CONTINUED)
PAY PLAN SUMMARY

Pay Plan	Grade	Minimum	Midpoint	Maximum	Range Spread	Midpoint Progression	Employees
Classified	G031	\$14.78	\$15.72	\$16.66	13%	2%	3
Classified	G033	\$15.38	\$16.36	\$17.34	13%	4%	2
Classified	G034	\$15.68	\$16.68	\$17.68	13%	2%	358
Classified	G035	\$16.05	\$17.07	\$18.09	13%	2%	91
Classified	G036	\$16.31	\$17.36	\$18.40	13%	2%	4
Classified	G037	\$16.64	\$17.70	\$18.76	13%	2%	14
Classified	G038	\$16.98	\$18.06	\$19.14	13%	2%	2
Classified	G039	\$17.32	\$18.43	\$19.53	13%	2%	22
Classified	G040	\$17.67	\$18.80	\$19.92	13%	2%	4
Classified	G041	\$18.02	\$19.16	\$20.30	13%	2%	1
Classified	G042	\$18.37	\$19.54	\$20.71	13%	2%	3
Classified	G044	\$19.11	\$20.33	\$21.55	13%	4%	2
Classified	G045	\$19.49	\$20.73	\$21.97	13%	2%	240
Classified	G046	\$19.90	\$21.17	\$22.43	13%	2%	43
Classified	G047	\$20.29	\$21.58	\$22.87	13%	2%	30
Classified	G048	\$21.22	\$22.57	\$23.92	13%	5%	16
Classified	G050	\$21.54	\$22.91	\$24.28	13%	1%	21
Classified	G051	\$21.96	\$23.37	\$24.77	13%	2%	3
Classified	G052	\$22.40	\$23.83	\$25.25	13%	2%	41
Classified	G053	\$22.85	\$24.30	\$25.75	13%	2%	3
Classified	G054	\$23.32	\$24.80	\$26.28	13%	2%	3
Classified	G055	\$23.78	\$25.29	\$26.79	13%	2%	5
Classified	G056	\$24.25	\$25.79	\$27.33	13%	2%	3
Classified	G057	\$24.73	\$26.30	\$27.87	13%	2%	4
Classified	G058	\$25.23	\$26.83	\$28.43	13%	2%	4
Classified	G059	\$25.73	\$27.37	\$29.01	13%	2%	7
Classified	G060	\$26.24	\$27.92	\$29.59	13%	2%	9
Classified	G061	\$26.78	\$28.49	\$30.19	13%	2%	11
Classified	G062	\$27.32	\$29.06	\$30.80	13%	2%	8
Classified	G063	\$27.87	\$29.64	\$31.41	13%	2%	7
Classified	G064	\$28.43	\$30.24	\$32.05	13%	2%	8
Classified	G065	\$29.01	\$30.85	\$32.69	13%	2%	3
Classified	G066	\$29.59	\$31.47	\$33.35	13%	2%	3
Classified	G067	\$30.19	\$32.10	\$34.01	13%	2%	2
Classified	G068	\$30.80	\$32.76	\$34.71	13%	2%	3
Classified	G070	\$32.05	\$34.08	\$36.11	13%	4%	1
Classified	G071	\$32.69	\$34.76	\$36.83	13%	2%	1
Classified	G072	\$33.34	\$35.46	\$37.58	13%	2%	5



**EXHIBIT 2A (CONTINUED)
PAY PLAN SUMMARY**

Pay Plan	Grade	Minimum	Midpoint	Maximum	Range Spread	Midpoint Progression	Employees
Classified	G073	\$34.00	\$36.16	\$38.32	13%	2%	6
Classified	G074	\$34.68	\$36.88	\$39.07	13%	2%	1
Classified	G075	\$35.38	\$37.62	\$39.86	13%	2%	8
Classified	G077	\$36.81	\$39.14	\$41.47	13%	4%	0
Classified	G078	\$37.54	\$39.93	\$42.31	13%	2%	1
Classified	G079	\$38.30	\$40.73	\$43.15	13%	2%	0
Classified	G080	\$39.07	\$41.55	\$44.02	13%	2%	0
Classified	G081	\$39.84	\$42.37	\$44.90	13%	2%	2
Classified	G082	\$40.63	\$43.21	\$45.79	13%	2%	2
Classified	G084	\$42.27	\$44.96	\$47.65	13%	4%	6
Classified	G086	\$43.99	\$46.78	\$49.56	13%	4%	4
Classified	G089	\$46.68	\$49.64	\$52.59	13%	6%	5



**EXHIBIT 2B
PAY PLAN STEPS**

Grade	1	2	3	4	5	6	7	8	9	10	11	12	13
G009	\$9.74	\$9.84	\$9.96	\$10.06	\$10.16	\$10.26	\$10.37	\$10.47	\$10.57	\$10.67	\$10.78	\$10.88	\$10.98
G016	\$11.19	\$11.30	\$11.41	\$11.54	\$11.65	\$11.76	\$11.88	\$11.99	\$12.11	\$12.24	\$12.36	\$12.48	\$12.62
G019	\$11.88	\$11.99	\$12.11	\$12.24	\$12.36	\$12.48	\$12.62	\$12.74	\$12.86	\$12.98	\$13.12	\$13.24	\$13.39
G020	\$12.12	\$12.25	\$12.37	\$12.49	\$12.63	\$12.75	\$12.87	\$13.01	\$13.13	\$13.25	\$13.40	\$13.53	\$13.66
G021	\$12.36	\$12.48	\$12.62	\$12.74	\$12.86	\$12.98	\$13.12	\$13.24	\$13.39	\$13.52	\$13.65	\$13.80	\$13.93
G023	\$12.86	\$12.98	\$13.12	\$13.24	\$13.39	\$13.52	\$13.65	\$13.80	\$13.93	\$14.07	\$14.21	\$14.34	\$14.49
G026	\$13.38	\$13.53	\$13.66	\$13.79	\$13.93	\$14.06	\$14.20	\$14.36	\$14.50	\$14.65	\$14.79	\$14.94	\$15.09
G027	\$13.66	\$13.79	\$13.93	\$14.06	\$14.20	\$14.36	\$14.50	\$14.65	\$14.79	\$14.94	\$15.09	\$15.23	\$15.40
G028	\$13.93	\$14.06	\$14.20	\$14.36	\$14.50	\$14.65	\$14.79	\$14.94	\$15.09	\$15.23	\$15.40	\$15.55	\$15.70
G029	\$14.20	\$14.36	\$14.50	\$14.65	\$14.79	\$14.94	\$15.09	\$15.23	\$15.40	\$15.55	\$15.70	\$15.86	\$16.02
G030	\$14.49	\$14.64	\$14.78	\$14.93	\$15.08	\$15.22	\$15.38	\$15.54	\$15.69	\$15.85	\$16.01	\$16.17	\$16.32
G031	\$14.78	\$14.93	\$15.08	\$15.22	\$15.38	\$15.54	\$15.69	\$15.85	\$16.01	\$16.17	\$16.32	\$16.49	\$16.66
G033	\$15.38	\$15.54	\$15.69	\$15.85	\$16.01	\$16.17	\$16.32	\$16.49	\$16.66	\$16.83	\$17.00	\$17.17	\$17.34
G034	\$15.68	\$15.84	\$16.00	\$16.16	\$16.31	\$16.48	\$16.65	\$16.82	\$16.99	\$17.15	\$17.33	\$17.49	\$17.68
G035	\$16.00	\$16.16	\$16.31	\$16.48	\$16.65	\$16.82	\$16.99	\$17.15	\$17.33	\$17.49	\$17.68	\$17.85	\$18.04
G036	\$16.31	\$16.48	\$16.65	\$16.82	\$16.99	\$17.15	\$17.33	\$17.49	\$17.68	\$17.85	\$18.04	\$18.21	\$18.40
G037	\$16.64	\$16.80	\$16.98	\$17.14	\$17.32	\$17.48	\$17.67	\$17.84	\$18.03	\$18.20	\$18.39	\$18.56	\$18.76
G038	\$16.98	\$17.14	\$17.32	\$17.48	\$17.67	\$17.84	\$18.03	\$18.20	\$18.39	\$18.56	\$18.76	\$18.95	\$19.14
G039	\$17.32	\$17.48	\$17.67	\$17.84	\$18.03	\$18.20	\$18.39	\$18.56	\$18.76	\$18.95	\$19.14	\$19.33	\$19.53
G040	\$17.67	\$17.84	\$18.03	\$18.20	\$18.39	\$18.56	\$18.76	\$18.95	\$19.14	\$19.33	\$19.53	\$19.71	\$19.92
G041	\$18.02	\$18.19	\$18.37	\$18.55	\$18.73	\$18.92	\$19.11	\$19.31	\$19.49	\$19.69	\$19.90	\$20.09	\$20.30
G042	\$18.37	\$18.55	\$18.73	\$18.92	\$19.11	\$19.31	\$19.49	\$19.69	\$19.90	\$20.09	\$20.30	\$20.50	\$20.71
G044	\$19.11	\$19.31	\$19.49	\$19.69	\$19.90	\$20.09	\$20.30	\$20.50	\$20.71	\$20.90	\$21.12	\$21.33	\$21.55
G045	\$19.49	\$19.69	\$19.90	\$20.09	\$20.30	\$20.50	\$20.71	\$20.90	\$21.12	\$21.33	\$21.55	\$21.77	\$21.97
G046	\$19.90	\$20.09	\$20.30	\$20.50	\$20.71	\$20.90	\$21.12	\$21.33	\$21.55	\$21.77	\$21.97	\$22.20	\$22.43
G047	\$20.29	\$20.49	\$20.69	\$20.89	\$21.11	\$21.32	\$21.54	\$21.74	\$21.96	\$22.19	\$22.41	\$22.64	\$22.87
G048	\$20.69	\$20.89	\$21.11	\$21.32	\$21.54	\$21.74	\$21.96	\$22.19	\$22.41	\$22.64	\$22.86	\$23.09	\$23.33



EXHIBIT 2B (CONTINUED)
PAY PLAN STEPS

Grade	1	2	3	4	5	6	7	8	9	10	11	12	13
G050	\$21.54	\$21.74	\$21.96	\$22.19	\$22.41	\$22.64	\$22.86	\$23.09	\$23.33	\$23.56	\$23.80	\$24.04	\$24.28
G051	\$21.96	\$22.19	\$22.41	\$22.64	\$22.86	\$23.09	\$23.33	\$23.56	\$23.80	\$24.04	\$24.27	\$24.52	\$24.77
G052	\$22.40	\$22.63	\$22.85	\$23.08	\$23.32	\$23.55	\$23.79	\$24.03	\$24.26	\$24.51	\$24.76	\$25.00	\$25.25
G053	\$22.85	\$23.08	\$23.32	\$23.55	\$23.79	\$24.03	\$24.26	\$24.51	\$24.76	\$25.00	\$25.25	\$25.49	\$25.75
G054	\$23.32	\$23.55	\$23.79	\$24.03	\$24.26	\$24.51	\$24.76	\$25.00	\$25.25	\$25.49	\$25.75	\$26.02	\$26.28
G055	\$23.78	\$24.02	\$24.25	\$24.50	\$24.74	\$24.99	\$25.24	\$25.48	\$25.74	\$26.00	\$26.27	\$26.52	\$26.79
G056	\$24.25	\$24.50	\$24.74	\$24.99	\$25.24	\$25.48	\$25.74	\$26.00	\$26.27	\$26.52	\$26.79	\$27.06	\$27.33
G057	\$24.73	\$24.98	\$25.23	\$25.47	\$25.73	\$25.99	\$26.24	\$26.51	\$26.78	\$27.05	\$27.32	\$27.59	\$27.87
G058	\$25.23	\$25.47	\$25.73	\$25.99	\$26.24	\$26.51	\$26.78	\$27.05	\$27.32	\$27.59	\$27.87	\$28.16	\$28.43
G059	\$25.73	\$25.99	\$26.24	\$26.51	\$26.78	\$27.05	\$27.32	\$27.59	\$27.87	\$28.16	\$28.43	\$28.71	\$29.01
G060	\$26.24	\$26.51	\$26.78	\$27.05	\$27.32	\$27.59	\$27.87	\$28.16	\$28.43	\$28.71	\$29.01	\$29.30	\$29.59
G061	\$26.78	\$27.05	\$27.32	\$27.59	\$27.87	\$28.16	\$28.43	\$28.71	\$29.01	\$29.30	\$29.59	\$29.88	\$30.19
G062	\$27.32	\$27.59	\$27.87	\$28.16	\$28.43	\$28.71	\$29.01	\$29.30	\$29.59	\$29.88	\$30.19	\$30.50	\$30.80
G063	\$27.87	\$28.16	\$28.43	\$28.71	\$29.01	\$29.30	\$29.59	\$29.88	\$30.19	\$30.50	\$30.80	\$31.10	\$31.41
G064	\$28.43	\$28.71	\$29.01	\$29.30	\$29.59	\$29.88	\$30.19	\$30.50	\$30.80	\$31.10	\$31.41	\$31.73	\$32.05
G065	\$29.01	\$29.30	\$29.59	\$29.88	\$30.19	\$30.50	\$30.80	\$31.10	\$31.41	\$31.73	\$32.05	\$32.36	\$32.69
G066	\$29.59	\$29.88	\$30.19	\$30.48	\$30.80	\$31.10	\$31.41	\$31.73	\$32.05	\$32.36	\$32.69	\$33.02	\$33.35
G067	\$30.19	\$30.50	\$30.80	\$31.10	\$31.41	\$31.73	\$32.05	\$32.36	\$32.69	\$33.02	\$33.34	\$33.67	\$34.01
G068	\$30.80	\$31.10	\$31.41	\$31.73	\$32.05	\$32.36	\$32.69	\$33.02	\$33.34	\$33.67	\$34.01	\$34.35	\$34.71
G070	\$32.05	\$32.36	\$32.69	\$33.02	\$33.34	\$33.67	\$34.01	\$34.35	\$34.70	\$35.05	\$35.40	\$35.75	\$36.11
G071	\$32.69	\$33.02	\$33.34	\$33.67	\$34.01	\$34.35	\$34.70	\$35.05	\$35.40	\$35.75	\$36.11	\$36.47	\$36.83
G072	\$33.34	\$33.67	\$34.01	\$34.35	\$34.70	\$35.05	\$35.40	\$35.75	\$36.11	\$36.47	\$36.83	\$37.20	\$37.58
G073	\$34.00	\$34.34	\$34.69	\$35.04	\$35.39	\$35.74	\$36.10	\$36.46	\$36.82	\$37.19	\$37.56	\$37.94	\$38.32
G074	\$34.68	\$35.03	\$35.38	\$35.73	\$36.09	\$36.45	\$36.81	\$37.18	\$37.55	\$37.92	\$38.31	\$38.69	\$39.07
G075	\$35.38	\$35.73	\$36.09	\$36.45	\$36.81	\$37.18	\$37.55	\$37.92	\$38.31	\$38.69	\$39.07	\$39.47	\$39.86
G077	\$36.81	\$37.18	\$37.54	\$37.92	\$38.30	\$38.68	\$39.07	\$39.45	\$39.85	\$40.25	\$40.65	\$41.06	\$41.47
G078	\$37.54	\$37.91	\$38.30	\$38.68	\$39.06	\$39.45	\$39.85	\$40.24	\$40.65	\$41.05	\$41.45	\$41.89	\$42.31



EXHIBIT 2B (CONTINUED)
PAY PLAN STEPS

Grade	1	2	3	4	5	6	7	8	9	10	11	12	13
G079	\$38.30	\$38.68	\$39.06	\$39.45	\$39.84	\$40.24	\$40.65	\$41.05	\$41.45	\$41.87	\$42.28	\$42.71	\$43.15
G080	\$39.07	\$39.45	\$39.84	\$40.24	\$40.64	\$41.05	\$41.46	\$41.87	\$42.28	\$42.71	\$43.15	\$43.58	\$44.02
G081	\$39.84	\$40.24	\$40.63	\$41.05	\$41.44	\$41.88	\$42.30	\$42.71	\$43.14	\$43.57	\$44.00	\$44.44	\$44.90
G082	\$40.63	\$41.05	\$41.44	\$41.88	\$42.28	\$42.71	\$43.14	\$43.56	\$44.00	\$44.44	\$44.88	\$45.33	\$45.79
G084	\$42.27	\$42.70	\$43.13	\$43.56	\$44.00	\$44.44	\$44.87	\$45.32	\$45.78	\$46.24	\$46.70	\$47.17	\$47.65
G086	\$43.99	\$44.43	\$44.87	\$45.32	\$45.77	\$46.23	\$46.69	\$47.16	\$47.63	\$48.10	\$48.59	\$49.07	\$49.56
G089	\$46.68	\$47.15	\$47.62	\$48.09	\$48.57	\$49.06	\$49.55	\$50.04	\$50.54	\$51.05	\$51.55	\$52.07	\$52.59



Exhibit 2C shows the 234 unique job titles that are currently being utilized by the District.

EXHIBIT 2C CLASSIFICATION TITLES

Classification Title	Classification Title
ACCOUNTANT	CENTRAL KITCHEN NUTRITION ASSISTANT
ACCOUNTING CLERK IV	CHIEF COMMUNICATIONS OFFICER
ACCOUNTING MANAGER	CHIEF FINANCIAL OFFICER
ACCTS PAYABLE ASSISTANT	CNA TECHNICIAN
ADMIN ASSIST TO ASSISTANT SUPT	COACH HS CAREER
ADMIN ASSIST TO BOE	COMPUTER OPERATOR
ADMIN ASSIST TO CHIEF LEGAL COUNSEL	CONSTRUCTION CONTRACT ADMINIST
ADMIN ASSIST TO CHIEF OF STAFF	CONSTRUCTION COORD
ADMIN ASSIST TO DIRECTOR III	CONSTRUCTION MANAGER
ADMIN ASSIST TO EXEC DIRECTOR	CONSTRUCTION PROGRAM MANAGER
ADMIN ASSIST TO EXEC OFFICERS	COOK-CHILL MANAGER
ADMIN ASSIST TO INSTRUCTION TECH	COORD SAFETY & TRAIN
ADMIN ASSIST TO PSYCH SERVICES	CROSSING GUARD
ADMIN ASSIST TO SUPERINTENDENT	CROSSING GUARD COORDINATOR
ADMIN TO CONTENT COORD	CROSSING GUARD SUPERVISOR
AFTER SCH COORD	CUSTODIAL SERVICES COORD
AFTER SCH-DATA MANAGER 21ST CC	CUSTODIAL TECHNICIAN
ATHLETIC TRAINER ARP	CUSTODIAN M&O
BILINGUAL FAMILY ENGAGE COORD	DEP CHIEF CAMPUS POLICE
BUDGET ASSISTANT	DIRECTOR II RISK MANAGEMENT
BUDGET COORD	DIRECTOR II TECHNOLOGY
BUDGET MANAGER	DIRECTOR III CAMPUS POLICE
BUILDING COORD	DIRECTOR III MAINTANANCE/GROUN
BUS AIDE/MONITOR	DIRECTOR III PROCUREMENT
BUS DRIVER	DIRECTOR III TRANSPORTATION
BUS/VAN DRIVER	DISPATCH MANAGER
CAMPUS POLICE COMMUNICATION COORDINATOR	EDU SUPPORT SPECIALIST
CAMPUS POLICE COMMUNICATION OFFICER	ELECTRICIAN I
CAMPUS POLICE INVESTIGATOR	ELECTRICIAN II
CAMPUS POLICE OFFICER	ELECTRICIAN SUPERVISOR
CAMPUS POLICE SERGEANT	ELECTRONICS TECHNICIAN II
CAREER COACH SUPERVISOR	ENERGY EDUCATOR
CARPENTER I	EXEC DIRECTOR ACCOUNTING
CARPENTER II	EXEC DIRECTOR CAPITAL PROGRAMS
CARPENTER SUPERVISOR	EXEC DIRECTOR HR



EXHIBIT 2C (CONTINUED)
CLASSIFICATION TITLES

Classification Title	Classification Title
FAMILY ENGAGE COORD	HVAC SUPERVISOR
FAMILY ENGAGE FACIL	HVAC TECHNICIAN ASSISTANT
FAMILY ENGAGE SPECIALIST	HVAC TECHNICIAN I
FIELD TRIP COORD	HVAC TECHNICIAN II
FINANCIAL ASSIST TO CFO	INSTRUCTION TECHNOLOGIST
FINANCIAL ASSISTANT	INTERPRETER
FLEET MANAGER	INVENTORY COORD
FOREMAN-TRANSPORT	INVENTORY PURCHASING SPECIALIST
GIS ROUTING SPECIALIST	LEA MENTAL HLTH CLINICIAN
GNETS PARAPROFESSIONAL	LEAD INTERPRETER/SCHEDULER
GNETS PROGRAM EVAL	LEARNING MANAGEMENT SYSTEM SPEC
GRAD COACH ARP	LOCKSMITH
GRANTS COORD	MAIL CARRIER II
GRANTS MANAGER	MAINTANANCE COORD
GROUND ASSIST SUPERVISOR	MAINTANANCE DISPATCHER/CLE
GROUND SUPERVISOR	MATERIAL HANDLING SPECIALIST
GROUNDSKEEPER I	MECHANIC ASSISTANT
GROUNDSKEEPER II	MECHANIC-TRANSPORT
GROUNDSKEEPER III	MEDIA CLERK
HALL MONITOR	NETWORK ENGINEER II
HEAD CUSTODIAN	NETWORK ENGINEER III
HEARING CLERK	NETWORK SECURE COORD
HOMELESS/MIGRANT LIASSON ASSIST	NUTRITION INVENTORY MANAGER
HR BENEFITS ADMINISTRATOR	NUTRITION TRAINING SPECIALIST
HR BENEFITS COORD	OCCUP THERAPIST
HR CERTIFIED ADMINISTRATOR	OCCUP THERAPIST ASSIST
HR CLASSIFIED ADMINISTRATOR	PAINTER
HR COORD	PARA COM LAB
HR FMLA ADMINISTRATOR	PARA INSTRUCTIONAL
HR PERSONNEL ASSISTANT	PARA ISS
HR PERSONNEL PROCESSING MANAGER	PARA KINDERGARTEN
HR RETIREMENT ADMINISTRATOR	PARA PBIS
HR SALARY SPECIALIST	PARA PRE-K
HR SUPPORT ASSISTANT	PARA SCH IMPRV
HR WORKERS COMP SPECIALIST	PARA SIGN SUPPORT SPECIALIST



EXHIBIT 2C (CONTINUED)
CLASSIFICATION TITLES

Classification Title	Classification Title
PARA SPED	SCH NURSE
PARA SPED PRE-K	SCH NURSE SPED
PARA SPED/ACCESS	SCH NUTRITION FINANCE MANAGER
PARA SPED/BSE	SCH REGISTRAR ES
PARA SPED/DIRECT SUPPORT	SCH REGISTRAR HCCA
PARA SPED/INTER	SCH REGISTRAR HS
PARAPROFESSIONAL	SCH REGISTRAR MS
PAYROLL ASSISTANT II	SCH REGISTRAR NORTHWOODS
PAYROLL SR ASSISTANT	SCH REGISTRAR SOAR
PC NETWORK TECHNICIAN II	SCH SECRETARY
PC NETWORK TECHNICIAN III	SCH SITE SUPPORT AREA MANAGER
PE EQUIPMENT SERVICE SUPERVISOR	SCHOOL CLERK
PE EQUIPMENT SERVICE WORKER	SCHOOL CUSTODIAN
PHYSICAL THERAPIST	SCHOOL CUSTODIAN HEAD
PLANT MANAGER	SCHOOL FOOD SERVICE WORKER
PLUMBER I	SECRETARY CTAE
PLUMBER II	SECRETARY II GNETS
PLUMBING SUPERVISOR	SECRETARY II PEC
PRE-K SECRETARY	SECRETARY II TECHNOLOGY
PROGRAM SUPPORT SPECIALIST	SECRETARY III AFTER SCH
PROJECT AWARE COORD	SECRETARY III ATHLETICS
PSYCHOLOGIST-INTERN	SECRETARY III CUSTODIAL
PUBLIC RELATIONS PERSONNEL	SECRETARY III FINE ARTS
PURCHASE ASSISTANT I	SECRETARY III GNETS
PURCHASE ASSISTANT II	SECRETARY III MAINTANANCE
PURCHASING AGENT	SECRETARY III RESEARCH
RADIO DISPATCHER	SECRETARY TO DIRECTOR MAINTANANCE
RECEIVING CLERK II	SECRETARY TO DIRECTOR PROCUREMENT
RECEPTIONIST	SECRETARY TO DIRECTOR TRANSPORTATION
RECORDS MANAGEMENT CLERK	SENIOR ANALYST
REGISTERED DIETITIAN	SFS CASHIER
ROUTE SUPERVISOR	SFS LUNCHROOM MONITOR
ROUTER	SFS NUTRITION ASSISTANT
SCH ADMIN MANAGER	SFS NUTRITION MANAGER - ELEMENTARY
SCH BOOKKEEPER	SFS NUTRITION MANAGER - MS/HS



**EXHIBIT 2C (CONTINUED)
CLASSIFICATION TITLES**

Classification Title
SFS NUTRITION MANAGER FL
SFS NUTRITION TEAM LEAD
SIS SUPPORT
SITE SUPPORT SUPERVISOR
SOCIAL WORKER TECHNICIAN
SOFTWARE SUPPORT COORD
SPED PARAPROFESSIONAL
STUDENT ENGAGE FACIL ARP
STUDENT INFORMATION SYSTEM MAN
STUDENT INFORMATION SYSTEM SPE
STUDENT SUPPORT ADVOCATE ARP
STUDENT TRANSITION SPECIALIST
SUPERVISOR PAYROLL
SUPPORT THERAPIST-GN
SYSTEM ADMIN II
SYSTEM ADMIN III
SYSTEM ADMINISTRATOR I – ELECT
TECHNOLOGY SPECIALIST II
TECHNOLOGY SYSTEM SPECIALIST
WAREHOUSE ASSISTANT FOREMAN
WAREHOUSE ASSISTANT I
WAREHOUSE FOREMAN
WELLNESS CENT COORD
YOUTH APPRENT COORD

2.2 SALARY PLACEMENT ANALYSIS

When assessing the effectiveness of a pay plan and associated policies, it is helpful to analyze where employee salaries stand in comparison to their classification's pay grade. Identifying areas where there are clusters of employee salaries can illuminate potential pay progression concerns within a pay plan. It should be noted that employee salaries, and the progression of the same, is associated with an organization's compensation philosophy—specifically, the method of salary progression and the availability of resources. Therefore, the placement of employee salaries should be viewed with this context in mind.

Below and At Minimum and At or Above Maximum

In general, the placement of an employee's salary at a classification's pay range minimum would generally indicate a newer employee or an employee that was recently promoted into a classification who has not had the opportunity or experience needed to progress through the range. In contrast, an employee with a salary at or near the maximum of their pay range is



generally an employee with longer tenure who has had the opportunity, experience, and/or performance to progress their salary toward the top of the pay range.

Exhibit 2D displays the percentage of employees whose salaries are at or below their respective pay range minimum and at or above the pay range maximum of their respective pay range maximum. Employees not included in these charts are compensated somewhere between the upper and lower thresholds. The percentages presented are based on the total number of employees in that classification. As shown, three employees (0.0 percent) have salaries below their respective pay range minimum, 34 (0.2 percent) have salaries below the minimum, 190 (12.9 percent) have salaries at the minimum, 73 (5.0 percent) have salaries at the maximum, and seven (0.5 percent) have salaries above the maximum.

EXHIBIT 2D
BELOW AND AT MINIMUM AND AT OR ABOVE MAXIMUM

Grade	Employees	Below Min		At Min		At Max		Above Max	
		#	%	#	%	#	%	#	%
G009	18	0	0.0%	0	0.0%	0	0.0%	0	0.0%
G016	13	0	0.0%	11	84.6%	0	0.0%	0	0.0%
G019	35	0	0.0%	7	20.0%	0	0.0%	0	0.0%
G020	21	0	0.0%	6	28.6%	0	0.0%	0	0.0%
G021	147	0	0.0%	45	30.6%	4	2.7%	0	0.0%
G023	72	0	0.0%	19	26.4%	2	2.8%	0	0.0%
G026	129	0	0.0%	0	0.0%	13	10.1%	0	0.0%
G027	2	0	0.0%	1	50.0%	0	0.0%	0	0.0%
G029	6	0	0.0%	0	0.0%	1	16.7%	0	0.0%
G030	4	0	0.0%	0	0.0%	0	0.0%	1	25.0%
G031	3	0	0.0%	0	0.0%	0	0.0%	0	0.0%
G033	2	0	0.0%	0	0.0%	0	0.0%	0	0.0%
G034	358	1	5.6%	66	18.4%	24	6.7%	0	0.0%
G035	91	0	0.0%	16	17.6%	8	8.8%	0	0.0%
G036	4	0	0.0%	0	0.0%	0	0.0%	3	75.0%
G037	14	0	0.0%	6	42.9%	0	0.0%	0	0.0%
G038	2	0	0.0%	0	0.0%	0	0.0%	0	0.0%
G039	22	0	0.0%	0	0.0%	4	18.2%	0	0.0%
G040	4	0	0.0%	0	0.0%	2	50.0%	0	0.0%
G041	1	0	0.0%	0	0.0%	0	0.0%	0	0.0%
G042	3	0	0.0%	0	0.0%	0	0.0%	0	0.0%
G044	2	0	0.0%	0	0.0%	0	0.0%	0	0.0%
G045	240	0	0.0%	0	0.0%	0	0.0%	3	1.3%
G046	43	1	5.6%	3	7.0%	0	0.0%	0	0.0%
G047	30	0	0.0%	1	3.3%	0	0.0%	0	0.0%
G048	16	0	0.0%	0	0.0%	0	0.0%	0	0.0%
G050	21	0	0.0%	0	0.0%	0	0.0%	0	0.0%



EXHIBIT 2D (CONTINUED)
BELOW AND AT MINIMUM AND AT OR ABOVE MAXIMUM

Grade	Employees	Below Min		At Min		At Max		Above Max	
		#	%	#	%	#	%	#	%
G051	3	1	5.6%	0	0.0%	0	0.0%	0	0.0%
G052	41	0	0.0%	7	17.1%	3	7.3%	0	0.0%
G053	3	0	0.0%	0	0.0%	0	0.0%	0	0.0%
G054	3	0	0.0%	0	0.0%	1	33.3%	0	0.0%
G055	5	0	0.0%	1	20.0%	1	20.0%	0	0.0%
G056	3	0	0.0%	0	0.0%	1	33.3%	0	0.0%
G057	4	0	0.0%	0	0.0%	3	75.0%	0	0.0%
G058	4	0	0.0%	1	25.0%	2	50.0%	0	0.0%
G059	7	0	0.0%	0	0.0%	2	28.6%	0	0.0%
G060	9	0	0.0%	0	0.0%	0	0.0%	0	0.0%
G061	11	0	0.0%	0	0.0%	0	0.0%	0	0.0%
G062	8	0	0.0%	0	0.0%	0	0.0%	0	0.0%
G063	7	0	0.0%	0	0.0%	0	0.0%	0	0.0%
G064	8	0	0.0%	0	0.0%	0	0.0%	0	0.0%
G065	3	0	0.0%	0	0.0%	0	0.0%	0	0.0%
G066	3	0	0.0%	0	0.0%	0	0.0%	0	0.0%
G067	2	0	0.0%	0	0.0%	0	0.0%	0	0.0%
G068	3	0	0.0%	0	0.0%	0	0.0%	0	0.0%
G070	1	0	0.0%	0	0.0%	0	0.0%	0	0.0%
G071	1	0	0.0%	0	0.0%	0	0.0%	0	0.0%
G072	5	0	0.0%	0	0.0%	0	0.0%	0	0.0%
G073	6	0	0.0%	0	0.0%	0	0.0%	0	0.0%
G074	1	0	0.0%	0	0.0%	0	0.0%	0	0.0%
G075	8	0	0.0%	0	0.0%	2	25.0%	0	0.0%
G078	1	0	0.0%	0	0.0%	0	0.0%	0	0.0%
G081	2	0	0.0%	0	0.0%	0	0.0%	0	0.0%
G082	2	0	0.0%	0	0.0%	0	0.0%	0	0.0%
G084	6	0	0.0%	0	0.0%	0	0.0%	0	0.0%
G086	4	0	0.0%	0	0.0%	0	0.0%	0	0.0%
G089	5	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Total	1472	3	0.2%	190	12.9%	73	5.0%	7	0.5%



Below and Above Midpoint

In addition to assessing the number of employee salaries at minimum and maximum, an analysis was conducted to determine the number of employees with salaries below and above pay range midpoint. Employees with salaries close to the midpoint of a pay range typically would be fully proficient in their classification and require minimal supervision to complete their job duties while performing satisfactorily. Within this framework, pay range midpoint is commonly considered to be the salary an individual could reasonably expect for similar work in the market. Therefore, it is important to examine the percentage and number of employees with salaries above and below the calculated midpoint.

Exhibit 2E displays the percentage of employee whose salaries are below or above their respective pay range midpoint. The percentages presented are based on the total number of employees in that grade. As can be seen, 966 (65.6 percent) employees are compensated below the midpoint and 506 (34.4 percent) are compensated above.

**EXHIBIT 2E
BELOW AND ABOVE MIDPOINT BY CLASSIFICATION**

Grade	Employees	<Mid		Mid>	
		#	%	#	%
G009	18	18	100.0%	0	0.0%
G016	13	13	100.0%	0	0.0%
G019	35	25	71.4%	10	28.6%
G020	21	20	95.2%	1	4.8%
G021	147	114	77.6%	33	22.4%
G023	72	58	80.6%	14	19.4%
G026	129	88	68.2%	41	31.8%
G027	2	1	50.0%	1	50.0%
G029	6	1	16.7%	5	83.3%
G030	4	2	50.0%	2	50.0%
G031	3	3	100.0%	0	0.0%
G033	2	1	50.0%	1	50.0%
G034	358	271	75.7%	87	24.3%
G035	91	61	67.0%	30	33.0%
G036	4	0	0.0%	4	100.0%
G037	14	13	92.9%	1	7.1%
G038	2	2	100.0%	0	0.0%
G039	22	13	59.1%	9	40.9%
G040	4	0	0.0%	4	100.0%
G041	1	1	100.0%	0	0.0%
G042	3	3	100.0%	0	0.0%
G044	2	0	0.0%	2	100.0%
G045	240	146	60.8%	94	39.2%



EXHIBIT 2E (CONTINUED)
BELOW AND ABOVE MIDPOINT BY CLASSIFICATION

Grade	Employees	<Mid		Mid>	
		#	%	#	%
G046	43	24	55.8%	19	44.2%
G047	30	12	40.0%	18	60.0%
G048	16	12	75.0%	4	25.0%
G050	21	4	19.0%	17	81.0%
G051	3	1	33.3%	2	66.7%
G052	41	20	48.8%	21	51.2%
G053	3	1	33.3%	2	66.7%
G054	3	1	33.3%	2	66.7%
G055	5	1	20.0%	4	80.0%
G056	3	2	66.7%	1	33.3%
G057	4	1	25.0%	3	75.0%
G058	4	1	25.0%	3	75.0%
G059	7	2	28.6%	5	71.4%
G060	9	3	33.3%	6	66.7%
G061	11	2	18.2%	9	81.8%
G062	8	3	37.5%	5	62.5%
G063	7	1	14.3%	6	85.7%
G064	8	4	50.0%	4	50.0%
G065	3	1	33.3%	2	66.7%
G066	3	0	0.0%	3	100.0%
G067	2	0	0.0%	2	100.0%
G068	3	1	33.3%	2	66.7%
G070	1	0	0.0%	1	100.0%
G071	1	0	0.0%	1	100.0%
G072	5	2	40.0%	3	60.0%
G073	6	4	66.7%	2	33.3%
G074	1	0	0.0%	1	100.0%
G075	8	3	37.5%	5	62.5%
G078	1	0	0.0%	1	100.0%
G081	2	0	0.0%	2	100.0%
G082	2	0	0.0%	2	100.0%
G084	6	4	66.7%	2	33.3%
G086	4	1	25.0%	3	75.0%
G089	5	1	20.0%	4	80.0%
Total	1472	966	65.6%	506	34.4%



2.3 QUARTILE ANALYSIS

In a quartile analysis, each salary range is divided into four equal segments (quartiles) and employees are assigned a quartile based on where their current salary falls. While there is no best practice for what average tenure should be for each quartile, and other factors outside of the breadth of this analysis can impact placement (e.g., promotional and hiring practices), this analysis is useful in revealing areas of compression within a compensation system when paired with tenure data. Generally, the ideal outcome is for the analysis to show a strong correlation between tenure and quartile, where higher tenure would be experienced in higher quartiles.

Exhibit 2F shows the number of employee salaries that are in each quartile of each pay range. Also, the average overall tenure (i.e. how long an employee has been at the District) by quartile is shown. As displayed, 44.4 percent of employees have salaries in the first quartile of their respective range, 21.2 percent have salaries in the second quartile, 19.7 percent have salaries in the third quartile, and 14.7 percent have salaries in the fourth quartile. Additionally, tenure consistently increases through the quartiles: average tenure in the first quartile is 2.4 years, is 6.9 years in the second quartile, is 12.7 years in the third quartile, and is 21.1 years in the fourth quartile.



**EXHIBIT 2F
QUARTILE ANALYSIS**

GRADE	Total Employees	Tenure	1st Quartile		2nd Quartile		3rd Quartile		4th Quartile	
			#	Avg. Tenure	#	Avg. Tenure	#	Avg. Tenure	#	Avg. Tenure
G009	18	4	13	1.6	5	9.5	0	-	0	-
G016	13	2	12	2.5	1	1.3	0	-	0	-
G019	35	8	13	1.6	12	8.0	9	15.2	1	27.2
G020	21	5	16	2.9	4	12.0	1	13.3	0	-
G021	147	7	92	2.3	22	8.2	24	16.1	9	22.9
G023	72	7	44	2.5	14	8.7	8	15.9	6	25.8
G026	129	9	66	1.9	22	9.5	14	15.7	27	21.7
G027	2	10	1	0.4	0	-	1	20.1	0	-
G029	6	17	0	-	1	2.0	3	14.9	2	28.4
G030	4	16	0	-	2	7.6	1	15.6	1	34.1
G031	3	3	2	3.1	1	3.5	0	-	0	-
G033	2	14	1	5.0	0	-	0	-	1	22.4
G034	358	7	194	2.3	77	7.3	47	14.6	40	23.4
G035	91	6	44	2.2	17	6.1	18	11.1	12	15.0
G036	4	25	0	-	0	-	1	15.6	3	28.8
G037	14	4	9	1.3	4	9.3	1	11.9	0	-
G038	2	8	1	1.0	1	14.1	0	-	0	-
G039	22	6	7	2.9	6	3.9	5	7.5	4	11.2
G040	4	26	0	-	0	-	2	15.9	2	35.7
G041	1	2	1	1.5	0	-	0	-	0	-
G042	3	5	0	-	3	5.0	0	-	0	-
G044	2	24	0	-	0	-	0	-	2	23.7
G045	240	9	81	3.0	65	6.4	63	13.7	31	20.3
G046	43	8	12	2.2	12	4.9	14	11.4	5	20.6
G047	30	10	2	1.5	10	5.0	7	11.7	11	16.0
G048	16	9	8	5.4	4	10.6	3	13.0	1	12.2



EXHIBIT 2F (CONTINUED)
QUARTILE ANALYSIS

GRADE	Total Employees	Tenure	1st Quartile		2nd Quartile		3rd Quartile		4th Quartile	
			#	Avg. Tenure	#	Avg. Tenure	#	Avg. Tenure	#	Avg. Tenure
G050	21	12	2	1.3	2	1.9	8	7.5	9	20.8
G051	3	14	1	25.7	0	-	0	-	2	7.8
G052	41	7	14	1.1	6	3.6	14	8.6	7	21.0
G053	3	11	0	-	1	4.0	1	3.7	1	24.0
G054	3	12	0	-	1	2.0	1	17.4	1	17.1
G055	5	12	1	0.4	0	-	2	11.1	2	19.1
G056	3	16	1	1.3	1	2.1	0	-	1	44.1
G057	4	12	1	1.3	0	-	0	-	3	15.7
G058	4	21	1	0.4	0	-	0	-	3	27.9
G059	7	19	0	-	2	10.6	2	15.9	3	27.8
G060	9	7	3	2.8	0	-	4	6.1	2	12.8
G061	11	13	0	-	2	4.6	7	13.6	2	17.7
G062	8	11	1	5.4	2	3.7	3	6.9	2	27.3
G063	7	12	1	1.2	0	-	3	7.7	3	20.0
G064	8	8	2	0.2	2	3.7	2	4.4	2	23.9
G065	3	2	1	2.2	0	-	1	3.3	1	1.8
G066	3	16	0	-	0	-	1	4.4	2	21.8
G067	2	8	0	-	0	-	2	7.6	0	-
G068	3	16	0	-	1	6.0	0	-	2	21.2
G070	1	11	0	-	0	-	1	11.3	0	-
G071	1	15	0	-	0	-	0	-	1	14.8
G072	5	5	2	1.8	0	-	3	6.3	0	-
G073	6	7	3	2.0	1	10.6	0	-	2	13.6
G074	1	10	0	-	0	-	1	10.4	0	-
G075	8	8	1	5.5	2	0.4	3	10.1	2	12.6
G078	1	26	0	-	0	-	0	-	1	26.2



EXHIBIT 2F (CONTINUED)
QUARTILE ANALYSIS

GRADE	Total Employees	Tenure	1st Quartile		2nd Quartile		3rd Quartile		4th Quartile	
			#	Avg. Tenure	#	Avg. Tenure	#	Avg. Tenure	#	Avg. Tenure
G081	2	6	0	-	0	-	2	5.7	0	-
G082	2	5	0	-	0	-	2	5.1	0	-
G084	6	5	0	-	4	3.2	2	7.3	0	-
G086	4	8	0	-	1	0.2	2	7.6	1	18.3
G089	5	16	0	-	1	1.4	1	15.4	3	21.4
Overall	1472	8.1	654	2.4	312	6.9	290	12.7	216	21.1



2.4 COMPRESSION ANALYSIS

Actual Versus Expected Salary Placement

Pay compression can occur when employees have not progressed through their pay range as their years of experience increase. The following analysis examines how far each employee has penetrated into their current pay range and compares it with their expected placement—assuming a 30-year period between minimum and maximum. Generally, the only source of concern would be employees that are more than ten percent below expected placement. Simply having employees in this group does not necessarily mean there are corresponding compression issues, assuming there is a reason for these placements. It is also acknowledged that the District's compensation practices may differ from progressing employees' salaries based upon tenure.

Exhibit 2G displays the number and percentage of employees whose actual salary placement varies from their expected placement. **Note:** This analysis considers an employee's years of service in their current classification, unlike the quartile analysis, which considers overall years of experience. As can be seen, 1,418 (96.3 percent) employees have salaries that are within ten percent of their expected salary placement, whereas four (0.3 percent) have salaries that are more than ten percent below expected placement, and 50 (3.4 percent) have salaries that are more than ten percent above.

EXHIBIT 2G
ACTUAL VERSUS EXPECTED PLACEMENT BY GRADE

Grade	Less than -10%	-10 < X < -5%	-5% < X < 5%	5% < X < 10%	Greater than 10%
G009	1	0	17	0	0
G016	0	1	11	1	0
G019	0	0	32	3	0
G020	0	0	20	1	0
G021	0	0	134	13	0
G023	0	1	68	3	0
G026	0	0	115	13	1
G027	0	0	2	0	0
G029	0	0	3	3	0
G030	0	0	3	0	1
G031	0	0	3	0	0
G033	0	0	2	0	0
G034	2	1	298	48	9
G035	0	0	64	20	7
G036	0	0	1	2	1
G037	0	0	12	2	0
G038	0	0	2	0	0
G039	0	0	12	6	4
G040	0	0	1	2	1



EXHIBIT 2G (CONTINUED)
ACTUAL VERSUS EXPECTED PLACEMENT BY GRADE

Grade	Less than -10%	-10 < X < -5%	-5% < X < 5%	5% < X < 10%	Greater than 10%
G041	0	0	1	0	0
G042	0	0	0	3	0
G044	0	0	0	0	2
G045	0	1	183	48	8
G046	0	0	30	13	0
G047	0	0	18	9	3
G048	0	1	11	4	0
G050	0	0	11	8	2
G051	1	0	0	1	1
G052	0	0	24	16	1
G053	0	0	0	3	0
G054	0	0	0	3	0
G055	0	0	3	2	0
G056	0	0	1	2	0
G057	0	0	2	0	2
G058	0	1	1	1	1
G059	0	0	4	3	0
G060	0	0	3	6	0
G061	0	0	6	5	0
G062	0	0	3	5	0
G063	0	0	5	2	0
G064	0	0	4	3	1
G065	0	0	1	1	1
G066	0	0	2	1	0
G067	0	0	1	1	0
G068	0	0	2	0	1
G070	0	0	1	0	0
G071	0	0	1	0	0
G072	0	1	1	3	0
G073	0	0	4	0	2
G074	0	0	1	0	0
G075	0	0	3	4	1
G078	0	0	1	0	0
G081	0	0	0	2	0
G082	0	0	2	0	0
G084	0	0	0	6	0
G086	0	0	1	3	0
G089	0	0	3	2	0
Totals	4	7	1134	277	50



2.5 DEPARTMENT/LOCATION DISTRIBUTION

As of December 2022, 1,494 Classified employees were distributed among 52 different departments/locations. The following analysis was intended to provide basic information regarding how Classified employees are distributed.

Exhibit 2H depicts the number of classifications that are present in each department/location, along with the number and overall percentage of total employees by department/location. As illustrated, the largest department/location (in terms of Classified employees) is Transportation, with 205 employees representing 13.7 percent of the District's Classified staff.

**EXHIBIT 2H
EMPLOYEES AND CLASSIFICATIONS BY DEPARTMENT/LOCATION**

Department/Location	Employees	Classes	% of Total
ALEXANDER II MAGNET SCHOOL	18	12	1.2%
APPLING MIDDLE SCHOOL	26	16	1.7%
BALLARD-HUDSON MIDDLE SCHOOL	30	16	2.0%
BERND ELEMENTARY SCHOOL	20	15	1.3%
BRUCE ELEMENTARY SCHOOL	23	13	1.5%
BURDELL-HUNT MAGNET SCHOOL	28	18	1.9%
CAMPUS POLICE	28	9	1.9%
CARTER ELEMENTARY SCHOOL	23	15	1.5%
CENTRAL HIGH SCHOOL	33	18	2.2%
CENTRAL KITCHEN	28	6	1.9%
CENTRAL OFFICE	130	96	8.7%
CORE DATA CENTER - HUTCHINGS	29	14	1.9%
ELAM ALEXANDER ACADEMY	41	14	2.7%
HARTLEY ELEMENTARY SCHOOL	19	15	1.3%
HEADSTART BELLEVUE AT BARDEN	2	2	0.1%
HEADSTART HALL	3	2	0.2%
HEARD ELEMENTARY SCHOOL	28	15	1.9%
HERITAGE ELEMENTARY SCHOOL	26	17	1.7%
HOWARD HIGH SCHOOL	33	15	2.2%
HOWARD MIDDLE SCHOOL	26	15	1.7%
INGRAM-PYE ELEMENTARY SCHOOL	29	17	1.9%
JOHN R LEWIS ELEMENTARY SCHOOL	30	18	2.0%
LANE ELEMENTARY SCHOOL	19	15	1.3%
MAINTENANCE AND OPERATIONS	53	30	3.5%
MARTIN LUTHER KING, JR ELEMENT	33	17	2.2%
METHODIST HOME/PRICE CENTER	1	1	0.1%
MILLER MAGNET MIDDLE SCHOOL	25	15	1.7%
NORTHEAST HIGH SCHOOL	32	16	2.1%



EXHIBIT 2H (CONTINUED)
EMPLOYEES AND CLASSIFICATIONS BY DEPARTMENT/LOCATION

Department	Employees	Classes	% of Total
NORTHWOODS ACADEMY SCHOOL	30	12	2.0%
PORTER ELEMENTARY SCHOOL	19	14	1.3%
PSYCHOLOGICAL SERVICES	4	2	0.3%
ROBERT J WILLIAMS COMPLEX	15	10	1.0%
RUTLAND HIGH SCHOOL	28	16	1.9%
RUTLAND MIDDLE SCHOOL	27	14	1.8%
SCHOOL NUTRITION OFFICE	16	10	1.1%
SKYVIEW ELEMENTARY SCHOOL	25	16	1.7%
SOAR ACADEMY	14	10	0.9%
SOUTHFIELD ELEMENTARY	36	16	2.4%
SOUTHWEST HIGH SCHOOL	37	18	2.5%
SPECIAL EDUCATION	1	1	0.1%
SPECIAL EDUCATION ADMIN	1	1	0.1%
SPRINGDALE ELEMENTARY SCHOOL	23	16	1.5%
TAYLOR ELEMENTARY SCHOOL	29	19	1.9%
TRANSPORTATION	205	15	13.7%
UNION ELEMENTARY SCHOOL	25	18	1.7%
VETERANS ELEMENTARY SCHOOL	29	19	1.9%
VINEVILLE ACADEMY OF THE ARTS	25	16	1.7%
VIP VIRTUAL ACADEMY	1	1	0.1%
WEAVER MIDDLE SCHOOL	28	16	1.9%
WELCOME CENTER	2	2	0.1%
WELLNESS CENTER	1	1	0.1%
WESTSIDE HIGH SCHOOL	35	18	2.3%
WILLIAMS ELEMENTARY SCHOOL	22	15	1.5%
Total	1494	768	100.0%

*The District currently utilizes 234 unique job titles; however, the total displayed here differs due to duplicate classifications across departments.

2.6 SUMMARY

The information contained in this chapter identifies features of the overall structure of the compensation system, as well as the administration of it at the individual employee level. Notably, the following was found:

- **Pay Plan** – Overall, the Classified plan administered by the District is fairly organized. Consistent range spreads, while extremely narrow, and step progressions were found in each of the 61 pay grades. Best practice suggests that plans have a consistent range spread between 50 to 70 percent to allow for adequate salary progression throughout the course of an employee's career. Additionally, the midpoint progression does vary between each of the grades; however, it appears that this is most likely due to unused grades being eliminated over time.



- **Salary Distribution** – The majority of employee salaries (65.6 percent) fall below their respective pay range midpoint with the majority of those employees having a salary within the first quartile of the assigned pay range. This may indicate compression amongst new and tenured employees.

This analysis serves as a starting point for the development of recommendations in this report. These observations were reviewed and considered in more detail throughout the course of the study. Paired with market data, Evergreen was able to make recommendations that will ensure that the compensation system at the District is structurally sound, competitive with the market, and equitable.



Chapter 3 - Summary of Employee Outreach

On January 23, 2023, the Evergreen Solutions Team released an employee survey on behalf of the District. The objective of this survey was to collect feedback on the strengths and weaknesses of the current compensation and classification plans. As a result, Evergreen received 514 survey responses from employees representing a cross section of departments and classifications as well as management levels.

Additionally, Evergreen conducted 23 focus group sessions virtually with employees on Tuesday, January 24, 2023, through Thursday, January 26, 2023. During these sessions, employees were asked to share their experiences thus far with the District.

The remainder of this chapter summarizes the comments made by survey and focus group participants. It is important to note that the views shared in this summary are not necessarily supported by Evergreen Solutions nor Bibb County School District. 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.

3.1 GENERAL FEEDBACK

Although the major purpose of the survey and focus groups was to discuss compensation and classification, the first three questions asked in the survey received feedback related as to why employees initially came to work for the District, why they remain employed, and what they feel the District does well for the employees. The most common replies were as follows.

- **Location** – Location was one of the most common survey responses as to why employees started working as well as remaining with the District. Many employees who participated in focus groups were from the area and mentioned that they wanted to give back to their community.
- **Benefits/Retirement** – The benefits and retirement packages offered by the District was another top response. This was also mentioned in many focus groups. Employees stated that the District offered good benefits and well as a pension, which did not seem to be common for the area.
- **Job Security/Stability** – Job security and stability were another common survey response as to why employees started working and remain employed with the District. Many employees in focus groups commented that there are opportunities for growth within the District.



- **Work Schedule** – Work schedules were mentioned as another contributing factor to employee retention. Employees stated that being on the same schedule as their children made life easier since they did not have to find childcare when schools were closed.
- **Enjoy the Type of Work** – A number of participants mentioned how fulfilling they find their careers. Many said they enjoy working with the District because they know it is making a positive impact on the community.

Exhibit 3A shows the aggregate results of factors that helped bring current employees to the District.

**EXHIBIT 3A
REASONS FOR APPLYING WITH THE DISTRICT**

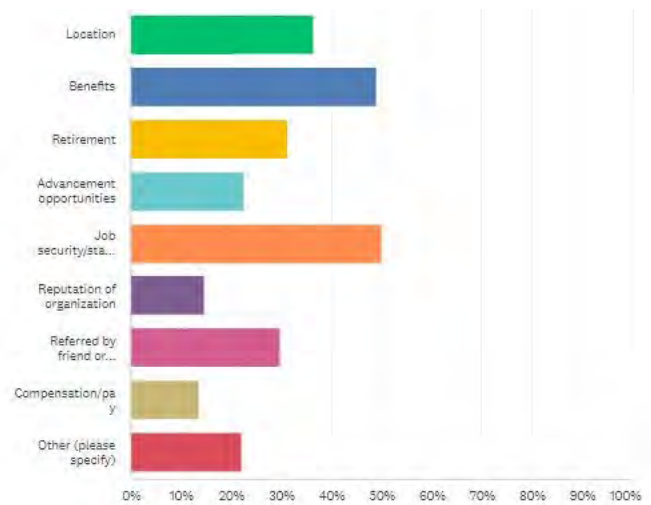
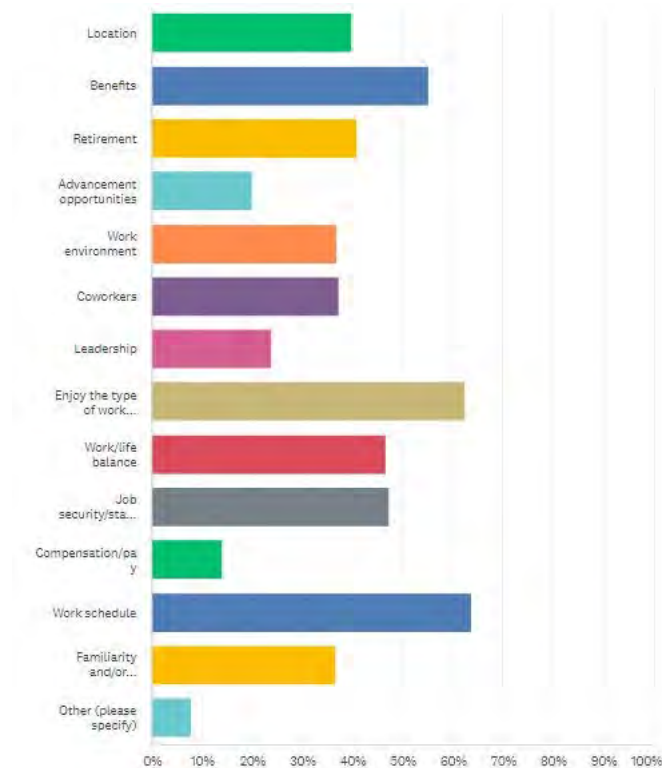


Exhibit 3B shows the aggregate results of factors that have encouraged employees to remain with the District.



EXHIBIT 3B REASONS FOR REMAINING WITH THE DISTRICT



3.2 COMPENSATION

Employees were asked about the District's compensation practices, policies, and procedures. The most frequent comments included the following:

- Familiarity with Compensation System** – Almost half (47.9 percent) of the survey participants said they were somewhat familiar with the District's current compensation system. Additionally, 20.3 percent stated they were very or extremely familiar with the compensation system. However, approximately 31.8 percent said they had little to no understanding of the compensation system.
- Competitive Salaries** – The majority of survey participants (73.8 percent) felt the District's salaries are not competitive with other districts. The narrow pay range was frequently mentioned in focus groups. Employees stated that there is little incentive to remain at the District in terms of compensation. Almost half of the classified pay grades have a minimum to maximum range difference of less than \$3.00.
- Merit Pay** – Staff members mentioned that they have yearly performance evaluations; however, there is no monetary incentive tied to the evaluation. Staff members voiced concern about this and requested a change in policy in order to motivate employees.



3.3 CLASSIFICATION

Participants were asked about any classification concerns. Comments shared by employees related to the District's classification structure include:

- **Job Descriptions** – Many survey respondents and focus group participants felt that the District's job descriptions should be updated to better reflect the duties and responsibilities of the various roles. Focus group participants mentioned that employees are often performing the work of multiple positions.
- **Inequity Amongst Classifications** – A major area of concern mentioned was the inequity amongst some classifications. For example, the pay grade for Administrative Assistants varies greatly and is determined by who the employee reports to instead of the type of work performed. The same was said about Paraprofessionals – all Paraprofessionals are in one pay grade; however, there are many different types of Paraprofessionals, some of which have more responsibilities/duties than others.
- **Manager v. Supervisor v. Coordinator** – Clarification was requested by employees regarding the difference between a Manager, Supervisor, and Coordinator as they often seem to be used interchangeably.

3.4 SUMMARY

The concerns expressed and reported above are generally common and exist in many organizations today. The District's commitment to seeking employee input and feedback regarding the compensation and classification system is a positive step toward improvement in these areas. During the outreach sessions, employees consistently stated that the District's compensation system should be improved to be market competitive and equitable to recruit and retain qualified employees.

The input received during employee outreach provided an understanding of the current environment and was considered while conducting the remainder of the study. The analyses discussed in the next chapters ultimately formed the basis for recommendations given in **Chapter 5** of this report.



Chapter 4 – Market Summary

The purpose of the market summary chapter is to benchmark the District's compensation practices against that of its market peers, in order to establish how competitive the District is with the market. To complete this market study, Evergreen compared pay ranges of select benchmark positions that the District possesses against the compensation of positions performing those same duties within peer organizations. By aggregating the differences in pay ranges across all the positions, a reasonable determination is made as to the District's competitive position within the market.

It is important to note that individual salaries are not analyzed in this methodology, since individual compensation can be affected by a number of variables such as experience and job performance. For this reason, Evergreen looked at average pay ranges across the entire classification to make the most accurate comparison. The results of this market study should be considered reflective of the current state of the market at the time of this study; however, market conditions can change rapidly. Consequently, it is necessary to perform market surveys of peer organizations at regular intervals in order for an organization to consistently monitor its position within the market. Furthermore, the market results detailed in this chapter provide a foundation for understanding the District's overall structural standing to the market, and the rates reflected in this chapter, while an important factor, are not the sole determinant for how classifications were placed into the proposed salary ranges outlined in **Chapter 5**.

Evergreen conducted a comprehensive market salary survey for the District, which included soliciting 22 target peer organizations for 98 benchmark positions. Of the 22 total organizations contacted, 19 responded and provided full or partial data for the benchmark positions. Target peers were selected based on a number of factors, including geographic proximity, resource level, job overlap, and size. Target organizations were also identified for their competition to the District for employee recruitment and retention efforts. The list of targets that provided data for the purpose of this study are included in **Exhibit 4A**.



EXHIBIT 4A RESPONDENT MARKET PEERS

Respondent Organizations
Houston County Schools
Henry County Schools
Dougherty County Schools
Muscogee County Schools
Richmond County Schools
Savannah-Chatham County Schools
Columbia County Schools
Fayette County Schools
Bulloch County Schools
Paulding County Schools
Carroll County Schools
Clarke County Schools
Walton County Schools
Rockdale County Schools
Newton County Schools
Hall County Schools
Clayton County Schools
Forsyth County Schools
Forsyth County Schools
Monroe County Schools

Because the data collected for the market summary was from various regions, it was necessary to adjust peer responses relative to the District based on cost-of-living. For all organizations that fell outside the District's immediate region, a cost-of-living adjustment was applied to the reported pay ranges to ensure a market average was attained in terms of the spending power an employee would have in the District's local area. Evergreen utilizes cost-of-living index information from the Council for Community and Economic Research. The cost-of-living index figures for the District and each of the respondent market peers are located in Exhibit 4B.



EXHIBIT 4B
RESPONDENTS WITH COST-OF-LIVING ADJUSTMENTS

Organization	Cost of Living
Bibb County School District	92.6
Houston County Schools	95.8
Henry County Schools	92.9
Dougherty County Schools	89.4
Muscogee County Schools	93.8
Richmond County Schools	90.5
Savannah-Chatham County Schools	95.8
Columbia County Schools	97.4
Fayette County Schools	104.1
Bulloch County Schools	89.0
Paulding County Schools	92.3
Carroll County Schools	91.5
Clarke County Schools	92.9
Walton County Schools	93.7
Rockdale County Schools	92.3
Newton County Schools	89.8
Hall County Schools	95.7
Clayton County Schools	89.3
Forsyth County Schools	103.9
Forsyth County Schools	103.9
Monroe County Schools	98.8

4.1 MARKET DATA

The results of the market study are displayed in **Exhibit 4C**, which includes the benchmark job titles and the market average salaries for each position at the minimum, midpoint, and maximum points of the pay ranges. Also included within the exhibit are the percent differentials of the District's pay ranges at each respective point, relative to the market average pay. A positive percent differential is indicative of the District's pay range exceeding that of the average of its market peers; alternatively, a negative percent differential indicates the District's compensation for a given position lagging behind the average of its peers. For those classifications where no differential is shown, this is due to the District not possessing a pay range for comparison to the market. The exhibit also includes the average pay range for the market respondents for each position, as well as how many responses each benchmark received.



While all benchmarks are included in the survey, not every peer organization possesses an appropriate match. Consequently, the benchmarks receive varying levels of response. For the purpose of this study, all positions that received fewer than five matches from market peers or had more than a 40-percent negative differential were considered outliers, thus were not included when establishing the District's competitive position. The rationale behind these positions being excluded is that insufficient response and extreme differentials can lead to unreliable averages that may skew the aggregated data, blurring the reality of the District's actual position in the market. Of the 98 positions surveyed, 83 were included when determining market position for the District.



EXHIBIT 4C MARKET SURVEY RESULTS

Classification	Survey Minimum		Survey Midpoint		Survey Maximum		Survey Avg Range	# Resp.
	Average	% Diff	Average	% Diff	Average	% Diff		
ACCOUNTANT	\$21.68	23.0%	\$27.78	4.5%	\$33.89	-9.5%	56.3%	9.0
ACCOUNTING CLERK IV	\$17.86	14.7%	\$22.88	-3.9%	\$27.90	-17.9%	56.3%	13.0
ACCOUNTING MANAGER	\$31.24	30.0%	\$40.33	10.9%	\$49.42	-3.6%	58.2%	10.0
ADMINISTRATIVE ASSISTANT	\$17.52	24.4%	\$22.22	7.0%	\$26.92	-6.4%	53.6%	12.0
AFTER SCH COORD-DATA SPECIALIST*	\$25.79	-2.2%	\$33.11	-21.0%	\$40.44	-34.9%	56.8%	4.0
ASSISTANT SUPERINTENDENT	\$54.51	-	\$69.19	-	\$83.87	-	53.9%	7.0
BUDGET COORD*	\$25.77	5.8%	\$32.53	-11.3%	\$39.29	-24.2%	52.5%	3.0
BUDGET MANAGER*	\$37.20	16.7%	\$47.52	-1.6%	\$57.83	-15.4%	55.5%	3.0
BUS AIDE/MONITOR	\$12.11	-2.0%	\$14.61	-14.5%	\$17.10	-24.3%	41.1%	18.0
BUS DRIVER	\$18.04	7.7%	\$21.77	-4.9%	\$25.50	-14.9%	41.4%	18.0
BUS/VAN DRIVER*	\$16.97	-33.3%	\$20.58	-46.0%	\$24.20	-55.7%	42.6%	13.0
CAMPUS POLICE COMMUNICATION OFFICER*	\$15.90	0.6%	\$20.16	-16.9%	\$24.41	-30.0%	53.5%	3.0
CAMPUS POLICE OFFICER	\$20.22	-1.6%	\$25.58	-18.9%	\$30.94	-31.9%	53.0%	6.0
CARPENTER I	\$17.30	6.0%	\$21.03	-7.4%	\$24.77	-17.9%	43.2%	9.0
CARPENTER SUPERVISOR	\$26.48	5.1%	\$32.79	-10.1%	\$39.10	-21.8%	47.7%	9.0
CHIEF COMMUNICATIONS OFFICER	\$44.19	-	\$54.21	-	\$64.23	-	45.3%	8.0
CHIEF FINANCIAL OFFICER	\$56.78	-	\$70.01	-	\$83.23	-	46.6%	7.0
CNA TECHNICIAN*	\$13.08	24.0%	\$17.51	1.1%	\$21.94	-15.6%	67.7%	4.0
COMPUTER OPERATOR	\$21.04	50.8%	\$28.15	28.8%	\$35.27	12.2%	67.6%	9.0
CONSTRUCTION MANAGER	\$30.85	31.2%	\$41.30	8.5%	\$51.75	-8.2%	67.8%	5.0
COOK-CHILL MANAGER	\$19.44	10.3%	\$24.34	-6.1%	\$29.25	-18.6%	50.5%	5.0
COORD SAFETY & TRAIN	\$19.66	24.8%	\$24.80	7.9%	\$29.93	-5.1%	52.2%	10.0
CROSSING GUARD*	\$17.34	-56.1%	\$19.36	-60.6%	\$21.39	-64.3%	23.4%	4.0
CUSTODIAN	\$12.79	4.5%	\$16.16	-12.7%	\$19.54	-25.7%	52.8%	17.0
DEP CHIEF CAMPUS POLICE*	\$34.32	8.9%	\$36.14	9.9%	\$37.96	10.8%	10.6%	3.0
DIRECTOR II RISK MANAGEMENT*	\$43.32	-	\$51.99	-	\$60.67	-	40.1%	2.0
DIRECTOR II TECHNOLOGY	\$51.59	-	\$64.03	-	\$76.48	-	48.3%	12.0
DIRECTOR III CAMPUS POLICE	\$41.84	-	\$51.91	-	\$61.98	-	48.2%	5.0
DIRECTOR III MAINTENANCE/GROUND	\$43.18	-	\$54.57	-	\$65.97	-	52.8%	13.0
DIRECTOR III PROCUREMENT	\$40.93	-	\$52.15	-	\$63.37	-	54.8%	5.0
DIRECTOR III TRANSPORTATION	\$44.11	-	\$54.81	-	\$65.50	-	48.5%	13.0
ELECTRICIAN I	\$18.25	16.6%	\$23.32	-1.8%	\$28.40	-15.6%	55.6%	14.0
ELECTRICIAN SUPERVISOR	\$26.11	6.5%	\$32.91	-10.5%	\$39.71	-23.3%	52.1%	11.0
ELECTRONICS TECHNICIAN II	\$20.33	9.7%	\$25.50	-6.8%	\$30.67	-19.4%	50.8%	7.0
EXEC DIRECTOR ACCOUNTING	\$44.03	-	\$55.03	-	\$66.02	-	49.9%	7.0
EXEC DIRECTOR CAPITAL PROGRAMS	\$45.99	-	\$60.56	-	\$75.12	-	63.4%	8.0
EXEC DIRECTOR HR	\$48.95	-	\$61.01	-	\$73.06	-	49.3%	11.0
FAMILY ENGAGE FACIL	\$18.10	-4.4%	\$23.05	-22.3%	\$27.99	-35.6%	54.7%	11.0
FLEET MANAGER	\$32.16	-16.3%	\$39.75	-31.1%	\$47.35	-42.4%	47.2%	9.0
FOREMAN-TRANSPORT	\$23.50	3.2%	\$29.78	-14.4%	\$36.06	-27.5%	53.5%	12.0
GRANTS MANAGER	\$27.50	3.3%	\$35.71	-16.6%	\$43.91	-31.2%	59.7%	7.0
GROUNDS SUPERVISOR	\$23.47	7.2%	\$29.93	-10.9%	\$36.39	-24.6%	55.1%	9.0
GROUNDSKEEPER I	\$14.07	-5.1%	\$18.03	-23.5%	\$21.98	-37.2%	56.2%	10.0
GROUNDSKEEPER III	\$16.71	-2.4%	\$21.41	-20.9%	\$26.11	-34.7%	56.3%	7.0
HEAD CUSTODIAN	\$15.38	1.9%	\$19.56	-15.9%	\$23.75	-29.3%	54.4%	15.0
HR BENEFITS COORD	\$24.08	38.0%	\$30.75	20.1%	\$37.42	6.3%	55.4%	13.0
HR COORD	\$26.49	28.8%	\$33.64	11.2%	\$40.80	-2.3%	54.0%	11.0
HR SUPPORT ASSISTANT	\$17.42	11.2%	\$22.63	-8.8%	\$27.84	-23.6%	59.8%	9.0
HVAC SUPERVISOR	\$26.91	3.5%	\$34.10	-14.0%	\$41.28	-27.2%	53.4%	11.0
HVAC TECHNICIAN ASSISTANT*	\$14.59	15.1%	\$18.53	-2.5%	\$22.46	-16.0%	53.9%	4.0
HVAC TECHNICIAN I	\$19.10	13.9%	\$24.39	-4.3%	\$29.67	-18.0%	55.3%	14.0
INVENTORY PURCHASING SPECIALIST	\$18.54	11.0%	\$23.20	-5.3%	\$27.86	-17.7%	50.3%	7.0
LEA MENTAL HLTH CLINICIAN*	\$30.50	-	\$42.49	-	\$54.48	-	78.6%	3.0
MAIL CARRIER II	\$14.45	20.1%	\$18.73	0.4%	\$23.01	-14.4%	59.3%	9.0
MAINTENANCE COORD	\$22.57	26.9%	\$28.93	8.4%	\$35.29	-5.7%	56.4%	8.0
MAINTENANCE PERSONNEL	\$15.32	-	\$19.65	-	\$23.99	-	56.6%	16.0
MECHANIC ASSISTANT	\$14.33	36.3%	\$17.47	23.0%	\$20.62	12.4%	43.9%	6.0



EXHIBIT 4C (CONTINUED) MARKET SURVEY RESULTS

Classification	Survey Minimum		Survey Midpoint		Survey Maximum		Survey Avg Range	# Resp.
	Average	% Diff	Average	% Diff	Average	% Diff		
MECHANIC-TRANSPORT	\$19.05	16.2%	\$24.03	-0.9%	\$29.01	-13.9%	52.3%	16.0
MEDIA CLERK	\$13.95	13.7%	\$17.50	-2.8%	\$21.04	-15.4%	50.8%	8.0
NETWORK ENGINEER II	\$29.81	30.7%	\$37.17	15.0%	\$44.53	2.8%	49.4%	11.0
NETWORK SECURE COORD	\$29.55	39.3%	\$37.55	21.9%	\$45.54	8.5%	54.1%	10.0
NUTRITION TRAINING SPECIALIST	\$22.08	19.3%	\$26.98	5.4%	\$31.88	-5.4%	44.4%	6.0
OCCUP THERAPIST	\$34.84	29.1%	\$46.74	6.0%	\$58.64	-10.9%	68.3%	10.0
OCCUP THERAPIST ASSIST	\$22.09	62.7%	\$29.82	40.5%	\$37.56	23.7%	70.0%	6.0
PARA SPED	\$13.40	15.7%	\$17.26	-3.4%	\$21.12	-17.7%	57.7%	19.0
PARAPROFESSIONAL	\$13.30	16.4%	\$17.15	-2.8%	\$21.00	-17.2%	57.9%	18.0
PAYROLL ASSISTANT II	\$16.56	20.2%	\$21.62	-0.2%	\$26.69	-15.4%	61.1%	11.0
PAYROLL SR ASSISTANT	\$19.53	21.6%	\$25.70	0.3%	\$31.87	-15.3%	63.2%	7.0
PC NETWORK TECHNICIAN II	\$22.37	0.1%	\$28.27	-17.1%	\$34.18	-30.0%	52.8%	13.0
PHYSICAL THERAPIST	\$38.70	18.7%	\$48.88	1.5%	\$59.06	-11.6%	52.6%	9.0
PLUMBER I	\$18.73	8.0%	\$23.36	-7.9%	\$27.99	-20.1%	49.5%	11.0
PLUMBING SUPERVISOR	\$26.17	6.3%	\$32.64	-9.6%	\$39.11	-21.8%	49.5%	10.0
PUBLIC RELATIONS PERSONNEL	\$24.28	15.7%	\$32.28	-6.5%	\$40.27	-22.7%	65.8%	9.0
PURCHASE ASSISTANT I	\$18.00	17.9%	\$23.41	-2.2%	\$28.83	-17.1%	60.1%	7.0
PURCHASING AGENT	\$23.85	23.5%	\$30.44	5.3%	\$37.04	-8.5%	55.3%	7.0
RECEPTIONIST	\$13.84	32.0%	\$17.45	15.2%	\$21.07	2.3%	52.2%	12.0
RECORDS MANAGEMENT CLERK	\$16.42	15.1%	\$20.68	-1.7%	\$24.94	-14.6%	51.9%	8.0
REGISTERED DIETITIAN*	\$26.91	40.6%	\$36.73	16.2%	\$46.55	-1.7%	73.0%	2.0
ROUTE SUPERVISOR	\$24.59	4.5%	\$30.62	-11.2%	\$36.66	-23.3%	49.1%	10.0
ROUTER*	\$18.42	-25.9%	\$23.85	-44.9%	\$29.28	-58.6%	59.0%	10.0
SCH BOOKKEEPER	\$15.95	20.0%	\$20.60	0.6%	\$25.25	-13.9%	58.3%	16.0
SCH CLERK ATTENDANCE	\$14.23	11.7%	\$17.84	-4.7%	\$21.45	-17.3%	50.7%	9.0
SCH NURSE	\$19.62	32.8%	\$24.47	17.2%	\$29.31	4.9%	49.4%	13.0
SCH REGISTRAR	\$15.71	25.4%	\$19.76	8.8%	\$23.81	-4.0%	51.5%	9.0
SCH SECRETARY	\$15.02	25.9%	\$19.23	7.5%	\$23.45	-6.5%	56.2%	17.0
SCHOOL FOOD SERVICE MANAGER	\$19.04	12.3%	\$23.74	-3.5%	\$28.43	-15.8%	49.3%	14.0
SCHOOL FOOD SERVICE WORKER	\$12.38	-0.2%	\$15.67	-17.5%	\$18.96	-30.6%	53.1%	17.0
SECRETARY TO DIRECTOR	\$18.63	8.5%	\$24.66	-13.3%	\$30.69	-29.2%	64.7%	13.0
SENIOR ANALYST	\$30.28	33.0%	\$35.70	22.9%	\$41.12	14.7%	35.8%	5.0
SFS NUTRITION ASSISTANT	\$12.38	-0.2%	\$15.67	-17.5%	\$18.96	-30.6%	53.1%	17.0
SOCIAL WORKER TECHNICIAN*	\$32.26	-70.9%	\$44.92	-93.2%	\$57.58	-107.4%	78.5%	8.0
STUDENT INFORMATION SYSTEM MAN	\$27.81	4.2%	\$36.10	-15.7%	\$44.40	-30.4%	59.7%	6.0
STUDENT INFORMATION SYSTEM SPEC	\$21.30	22.8%	\$27.59	3.2%	\$33.89	-11.5%	59.1%	8.0
STUDENT TRANSITION SPECIALIST*	\$20.69	23.7%	\$29.58	-5.8%	\$38.48	-26.1%	86.0%	4.0
SUPERVISOR PAYROLL	\$27.13	38.0%	\$34.41	20.7%	\$41.69	7.4%	53.7%	10.0
SYSTEM ADMIN II	\$29.67	-0.3%	\$37.32	-17.0%	\$44.97	-29.7%	51.5%	8.0
TECHNOLOGY SPECIALIST II	\$23.05	-2.9%	\$28.82	-19.0%	\$34.59	-31.2%	50.0%	9.0
WAREHOUSE ASSISTANT	\$14.12	-3.3%	\$18.45	-23.8%	\$22.79	-38.7%	61.4%	9.0
Overall Average		12.4%		-5.2%		-18.4%	54.1%	9.5
Outliers Removed*		14.2%		-2.9%		-15.6%		

*Benchmark is considered an outlier due to insufficient response or extreme negative differential.



4.2 SALARY SURVEY RESULTS

Market Minimums

It is important to assess where an organization is relative to its market minimum salaries, as they are the beginning salaries of employees with minimal qualifications for a given position. Organizations that are significantly below market may experience recruitment challenges with entry-level employees. As seen in **Exhibit 4C**, the District is currently 14.2 percent above the market average minimum when excluding outliers.

The following points are regarding the District's position relative to the market average minimum:

- Of these 83 positions, one was below market at 16.3 percent below. This position is displayed in **Exhibit 4D**.

EXHIBIT 4D CLASSIFICATIONS MORE THAN 10 PERCENT BELOW THE MINIMUM

Classification	% Diff
FLEET MANAGER	-16.3%

- Of these 83 positions, 60 were above market, with 43 more than 10 percent above the average market minimum. These positions are displayed in **Exhibit 4E**.

EXHIBIT 4E CLASSIFICATIONS MORE THAN 10 PERCENT ABOVE THE MINIMUM

Classification	% Diff
OCCUP THERAPIST ASSIST	62.7%
COMPUTER OPERATOR	50.8%
NETWORK SECURE COORD	39.3%
HR BENEFITS COORD	38.0%
SUPERVISOR PAYROLL	38.0%
MECHANIC ASSISTANT	36.3%
SENIOR ANALYST	33.0%
SCH NURSE	32.8%
RECEPTIONIST	32.0%
CONSTRUCTION MANAGER	31.2%
NETWORK ENGINEER II	30.7%
ACCOUNTING MANAGER	30.0%
OCCUP THERAPIST	29.1%



EXHIBIT 4E (CONTINUED)
CLASSIFICATIONS MORE THAN 10 PERCENT ABOVE THE MINIMUM

Classification	% Diff
HR COORD	28.8%
MAINTANANCE COORD	26.9%
SCH SECRETARY	25.9%
SCH REGISTRAR	25.4%
COORD SAFETY & TRAIN	24.8%
ADMINISTRATIVE ASSISTANT	24.4%
PURCHASING AGENT	23.5%
ACCOUNTANT	23.0%
STUDENT INFORMATION SYSTEM SPE	22.8%
PAYROLL SR ASSISTANT	21.6%
PAYROLL ASSISTANT II	20.2%
MAIL CARRIER II	20.1%
SCH BOOKKEEPER	20.0%
NUTRITION TRAINING SPECIALIST	19.3%
PHYSICAL THERAPIST	18.7%
PURCHASE ASSISTANT I	17.9%
ELECTRICIAN I	16.6%
PARAPROFESSIONAL	16.4%
MECHANIC-TRANSPORT	16.2%
PUBLIC RELATIONS PERSONNEL	15.7%
PARA SPED	15.7%
RECORDS MANAGEMENT CLERK	15.1%
ACCOUNTING CLERK IV	14.7%
HVAC TECHNICIAN I	13.9%
MEDIA CLERK	13.7%
SCHOOL FOOD SERVICE MANAGER	12.3%
SCH CLERK ATTENDANCE	11.7%
HR SUPPORT ASSISTANT	11.2%
INVENTORY PURCHASING SPECIALIS	11.0%
COOK-CHILL MANAGER	10.3%

Market Midpoints

The market midpoint is exceptionally important to analyze, as it is often considered the closest estimation of market average compensation. As seen in **Exhibit 4C**, the District is currently 2.9 percent below the market average midpoint.



The following points are regarding the District's position relative to the market average midpoint:

- Of these 83 positions, 47 were below market, with 26 were more than 10 percent below the average market minimum. These positions are displayed in **Exhibit 4F**.

EXHIBIT 4F
CLASSIFICATIONS MORE THAN 10 PERCENT BELOW THE MIDPOINT

Classification	% Diff
FLEET MANAGER	-31.1%
WAREHOUSE ASSISTANT	-23.8%
GROUNDSKEEPER I	-23.5%
FAMILY ENGAGE FACIL	-22.3%
GROUNDSKEEPER III	-20.9%
TECHNOLOGY SPECIALIST II	-19.0%
CAMPUS POLICE OFFICER	-18.9%
SCHOOL FOOD SERVICE WORKER	-17.5%
SFS NUTRITION ASSISTANT	-17.5%
PC NETWORK TECHNICIAN II	-17.1%
SYSTEM ADMIN II	-17.0%
GRANTS MANAGER	-16.6%
HEAD CUSTODIAN	-15.9%
STUDENT INFORMATION SYSTEM MAN	-15.7%
BUS AIDE/MONITOR	-14.5%
FOREMAN-TRANSPORT	-14.4%
HVAC SUPERVISOR	-14.0%
SECRETARY TO DIRECTOR	-13.3%
CUSTODIAN	-12.7%
ROUTE SUPERVISOR	-11.2%
GROUNDS SUPERVISOR	-10.9%
ELECTRICIAN SUPERVISOR	-10.5%
CARPENTER SUPERVISOR	-10.1%

- Of these 83 positions, 27 were above market, with 12 more than 10 percent above the average market midpoint. These positions are displayed in **Exhibit 4G**.



EXHIBIT 4G
CLASSIFICATIONS MORE THAN 10 PERCENT ABOVE THE MIDPOINT

Classification	% Diff
OCCUP THERAPIST ASSIST	40.5%
COMPUTER OPERATOR	28.8%
MECHANIC ASSISTANT	23.0%
SENIOR ANALYST	22.9%
NETWORK SECURE COORD	21.9%
SUPERVISOR PAYROLL	20.7%
HR BENEFITS COORD	20.1%
SCH NURSE	17.2%
RECEPTIONIST	15.2%
NETWORK ENGINEER II	15.0%
HR COORD	11.2%
ACCOUNTING MANAGER	10.9%

Market Maximums

The pay range maximum averages, and how they compare to the District's, are also detailed in **Exhibit 4C**. As seen in **Exhibit 4C**, the District is currently 15.6 percent below the market average maximum.

The following points are regarding the District's position relative to the market average maximum:

- Of these 83 positions, 64 were below market, with 50 more than 10 percent below the average market maximum. These positions are displayed in **Exhibit 4H**.

EXHIBIT 4H
CLASSIFICATIONS MORE THAN 10 PERCENT BELOW THE MAXIMUM

Classification	% Diff
FLEET MANAGER	-42.4%
WAREHOUSE ASSISTANT	-38.7%
GROUNDSKEEPER I	-37.2%
FAMILY ENGAGE FACIL	-35.6%
GROUNDSKEEPER III	-34.7%
CAMPUS POLICE OFFICER	-31.9%
GRANTS MANAGER	-31.2%
TECHNOLOGY SPECIALIST II	-31.2%



EXHIBIT 4H (CONTINUED)
CLASSIFICATIONS MORE THAN 10 PERCENT BELOW THE MAXIMUM

Classification	% Diff
SCHOOL FOOD SERVICE WORKER	-30.6%
SFS NUTRITION ASSISTANT	-30.6%
STUDENT INFORMATION SYSTEM MAN	-30.4%
PC NETWORK TECHNICIAN II	-30.0%
SYSTEM ADMIN II	-29.7%
HEAD CUSTODIAN	-29.3%
SECRETARY TO DIRECTOR	-29.2%
FOREMAN-TRANSPORT	-27.5%
HVAC SUPERVISOR	-27.2%
CUSTODIAN	-25.7%
GROUNDS SUPERVISOR	-24.6%
BUS AIDE/MONITOR	-24.3%
HR SUPPORT ASSISTANT	-23.6%
ELECTRICIAN SUPERVISOR	-23.3%
ROUTE SUPERVISOR	-23.3%
PUBLIC RELATIONS PERSONNEL	-22.7%
PLUMBING SUPERVISOR	-21.8%
CARPENTER SUPERVISOR	-21.8%
PLUMBER I	-20.1%
ELECTRONICS TECHNICIAN II	-19.4%
COOK-CHILL MANAGER	-18.6%
HVAC TECHNICIAN I	-18.0%
CARPENTER I	-17.9%
ACCOUNTING CLERK IV	-17.9%
PARA SPED	-17.7%
INVENTORY PURCHASING SPECIALIS	-17.7%
SCH CLERK ATTENDANCE	-17.3%
PARAPROFESSIONAL	-17.2%
PURCHASE ASSISTANT I	-17.1%
SCHOOL FOOD SERVICE MANAGER	-15.8%
ELECTRICIAN I	-15.6%
PAYROLL ASSISTANT II	-15.4%
MEDIA CLERK	-15.4%
PAYROLL SR ASSISTANT	-15.3%
BUS DRIVER	-14.9%
RECORDS MANAGEMENT CLERK	-14.6%



EXHIBIT 4H (CONTINUED)
CLASSIFICATIONS MORE THAN 10 PERCENT BELOW THE MAXIMUM

Classification	% Diff
MAIL CARRIER II	-14.4%
SCH BOOKKEEPER	-13.9%
MECHANIC-TRANSPORT	-13.9%
PHYSICAL THERAPIST	-11.6%
STUDENT INFORMATION SYSTEM SPE	-11.5%
OCCUP THERAPIST	-10.9%

- Of these 83 positions, 10 were above market while four of them were more than 10 percent above the average market maximum. These positions are displayed in **Exhibit 4I**.

EXHIBIT 4I
CLASSIFICATIONS MORE THAN 10 PERCENT ABOVE THE MAXIMUM

Classification	% Diff
OCCUP THERAPIST ASSIST	23.7%
SENIOR ANALYST	14.7%
MECHANIC ASSISTANT	12.4%
COMPUTER OPERATOR	12.2%

4.3 SALARY SURVEY CONCLUSION

The standing of individual classifications pay range relative to the market should not be considered a definitive assessment of actual employee salaries being similarly above or below the market; however, such differentials can, in part, explain symptomatic issues with recruitment and retention of employees.

The main summary points of the market study are as follows:

- The District's pay ranges are approximately 14.2 percent above the market minimum.
- The District's pay ranges are approximately 2.9 percent below the market midpoint.
- The District's pay ranges are approximately 15.6 percent below the market maximum.
- The District's pay range spread is approximately 12.7 percent, while its peers' pay range spread is 54.1 percent. That means that the District's salary scale is narrower than its peers. As a result, even though the District is above the average compared to the market at the minimum, because of the narrow spread, it loses ground compared to peers at the higher end of the spectrum.



The results of the market summary chapter are pivotal in the formulation of recommendations by Evergreen Solutions. By establishing the District's market position relative to its peers, Evergreen is better able to propose recommendations that enable the District to occupy its desired competitive position.



Chapter 5 – Recommendations

The analysis of the District's classification and compensation system revealed a few areas that could be adjusted to improve the overall structure and address potential areas of concern. Evergreen focused primarily on developing a more competitive pay plan, as well as reviewing and making recommendations to the classification structure. Study recommendations, as well as the findings that led to each, are discussed in this chapter.

5.1 CLASSIFICATION SYSTEM

An organization's classification system establishes how its human resources are employed to perform its core services. The classification system consists of the titles and descriptions of the different classifications, or positions, which define how work is organized and assigned. It is essential that the titles and descriptions of an organization's classifications accurately depict the work being performed by employees in the classifications to ensure equity within the organization and to enable comparisons with positions at peer organizations. The purpose of a classification analysis is to identify such issues as incorrect titles and inconsistent titles across departments.

In the analysis of the District's classification system, Evergreen collected classification data through the Job Assessment Tool (JAT) and Management Issues Tool (MIT) processes. The JATs, which were completed by employees and reviewed by their supervisors, provided information about the type and level of work being performed for each of the District's classifications. In addition, the MIT process provided supervisors an opportunity to provide specific recommendations regarding the pay or classification of positions in their areas. Evergreen reviewed and utilized the data provided in the JATs and MITs as a basis for the classification recommendations below.

FINDING

Overall, the classification system utilized by the District was sound. However, there were a few instances of titles for positions that could be modified.

RECOMMENDATION 1: Revise the titles of some classifications to better reflect job duties.

Exhibit 5A provides a list of the recommended changes to the classification system. The foundation for these recommendations was the work performed by employees as described in their JATs, best practice in the Human Resources field, or unique needs which required a specific titling method.



EXHIBIT 5A PROPOSED CLASSIFICATION CHANGES

Current Classification Title	Proposed Classification Title
ADMIN ASSIST TO ASSISTANT SUPT	EXECUTIVE ASSISTANT
ADMIN ASSIST TO BOE	ADMINISTRATIVE ASSISTANT II
ADMIN ASSIST TO CHIEF LEGAL COUNSEL	EXECUTIVE ASSISTANT
ADMIN ASSIST TO CHIEF OF STAFF	EXECUTIVE ASSISTANT
ADMIN ASSIST TO DIRECTOR III	ADMINISTRATIVE ASSISTANT I
ADMIN ASSIST TO EXEC DIRECTOR	ADMINISTRATIVE ASSISTANT I
ADMIN ASSIST TO EXEC OFFICERS	ADMINISTRATIVE ASSISTANT II
ADMIN ASSIST TO INSTRUCTION TECH	ADMINISTRATIVE ASSISTANT I
ADMIN ASSIST TO PSYCH SERVICES	ADMINISTRATIVE ASSISTANT I
ADMIN ASSIST TO SUPERINTENDENT	EXECUTIVE ASSISTANT
ADMIN TO CONTENT COORD	ADMINISTRATIVE ASSISTANT I
BILINGUAL FAMILY ENGAGE COORD	FAMILY ENGAGEMENT FACILITATOR
BUDGET MANAGER	DIRECTOR BUDGET
COMPUTER OPERATOR	DATA ADMINISTRATOR
CONSTRUCTION CONTRACT ADMINIST	CONSTRUCTION CONTRACT SPECIALIST
CONSTRUCTION COORD	CONSTRUCTION COORD
CONSTRUCTION MANAGER	CONSTRUCTION PROJECT MANAGER
CONSTRUCTION PROGRAM MANAGER	CONSTRUCTION OPERATIONS MANAGER
COOK-CHILL MANAGER	CENTRAL KITCHEN MANAGER
DIRECTOR II RISK MANAGEMENT	DIRECTOR II SAFETY AND SECURITY
DIRECTOR III CAMPUS POLICE	CHIEF OF POLICE
GNETS PARAPROFESSIONAL	PARAPROFESSIONAL
GNETS PROGRAM EVAL	GNETS PROGRAM ASSISTANT
HEAD CUSTODIAN	SCHOOL CUSTODIAN HEAD
HR BENEFITS ADMINISTRATOR	HR BENEFITS SPECIALIST
HR CERTIFIED ADMINISTRATOR	HR CERTIFIED SPECIALIST
HR CLASSIFIED ADMINISTRATOR	HR CLASSIFIED SPECIALIST
HR FMLA ADMINISTRATOR	HR FMLA SPECIALIST
HR PERSONNEL PROCESSING MANAGER	HR PERSONNEL PROCESSING SPECIALIST
HR RETIREMENT ADMINISTRATOR	HR RETIREMENT SPECIALIST
INSTRUCTION TECHNOLOGIST	INSTRUCTIONAL TECHNOLOGY SPECIALIST
MAIL CARRIER II	MAIL CARRIER
PAYROLL ASSISTANT II	PAYROLL ASSISTANT
PAYROLL SR ASSISTANT	LEAD PAYROLL ASSISTANT
PRE-K SECRETARY	ADMINISTRATIVE ASSISTANT I
PUBLIC RELATIONS PERSONNEL	PUBLIC RELATIONS SPECIALIST
SCHOOL FOOD SERVICE WORKER	SFS NUTRITION ASSISTANT
SECRETARY CTAE	CTAE ASSISTANT
SECRETARY II PEC	ADMINISTRATIVE ASSISTANT I
SECRETARY II TECHNOLOGY	ADMINISTRATIVE ASSISTANT I
SECRETARY III AFTER SCH	ADMINISTRATIVE ASSISTANT I
SECRETARY III ATHLETICS	ADMINISTRATIVE ASSISTANT I



EXHIBIT 5A (CONTINUED)
PROPOSED CLASSIFICATION CHANGES

Current Classification Title	Proposed Classification Title
SECRETARY III CUSTODIAL	ADMINISTRATIVE ASSISTANT I
SECRETARY III FINE ARTS	ADMINISTRATIVE ASSISTANT I
SECRETARY III GNETS	ADMINISTRATIVE ASSISTANT I
SECRETARY III MAINTANANCE	ADMINISTRATIVE ASSISTANT I
SECRETARY III RESEARCH	ADMINISTRATIVE ASSISTANT I
SECRETARY TO DIRECTOR MAINTENANCE	ADMINISTRATIVE ASSISTANT I
SECRETARY TO DIRECTOR PROCUREMENT	ADMINISTRATIVE ASSISTANT I
SECRETARY TO DIRECTOR TRANSPORTATION	ADMINISTRATIVE ASSISTANT I
SOCIAL WORKER TECHNICIAN	SOCIAL WORKER INTERN
SUPPORT THERAPIST-GN	PARAPROFESSIONAL
TECHNOLOGY SPECIALIST II	TECHNICAL TRAINER

5.2 COMPENSATION SYSTEM

The compensation system analysis consisted of two parts: an external market assessment and an internal equity assessment. During the external market assessment, the District's pay ranges for its classifications were compared to the average of the identified market. Details regarding the external market assessment were provided in **Chapter 4** of this report.

During the internal equity assessment (JAT), consideration of the relationships between positions and the type of work being performed by the District employees were reviewed and analyzed. Specifically, a composite score was assigned to each of the classifications that quantified the classification's level of five separate compensatory factors (leadership, working conditions, complexity, decision-making, and relationships). The level for each factor was determined based on responses to the JAT.

It is important to note that this score is not the sole determining factor when placing classifications into a pay grade. The results of both the internal (JAT) and external (market survey) analyses were utilized to create a linear regression model in order to develop the recommendations below. Other factors, such as career progression and organizational needs, were also taken into account when developing these recommendations.

FINDING

The District's salary ranges for Classified staff were found overall to be behind the market at the midpoint and maximum. Implementing a new competitive pay structure (pay plan) would provide the District with an improved ability to attract, hire and retain employees.

RECOMMENDATION 2: Implement a new step plan for Classified employees; slot all classifications into the plans based on external and internal equity; and transition employees' salaries into the new plans.



Exhibits 5B and 5C show an overview of the new plan for Classified employees. As can be seen, this plan includes 27 pay grades with 20 steps and a 50 percent range spread.

**EXHIBIT 5B
PROPOSED PAY PLAN – CLASSIFIED EMPLOYEES**

Grade	Proposed Minimum	Proposed Midpoint	Proposed Maximum	Range Spread	Grade Progression	Step Progression
101	\$12.25	\$15.31	\$18.38	50%	-	2.2%
102	\$12.99	\$16.23	\$19.48	50%	6%	2.2%
103	\$13.76	\$17.21	\$20.65	50%	6%	2.2%
104	\$14.59	\$18.24	\$21.88	50%	6%	2.2%
105	\$15.47	\$19.33	\$23.20	50%	6%	2.2%
106	\$16.39	\$20.49	\$24.59	50%	6%	2.2%
107	\$17.38	\$21.72	\$26.07	50%	6%	2.2%
108	\$18.42	\$23.02	\$27.63	50%	6%	2.2%
109	\$19.52	\$24.41	\$29.29	50%	6%	2.2%
110	\$20.70	\$25.87	\$31.04	50%	6%	2.2%
111	\$21.94	\$27.42	\$32.91	50%	6%	2.2%
112	\$23.25	\$29.07	\$34.88	50%	6%	2.2%
113	\$24.65	\$30.81	\$36.97	50%	6%	2.2%
114	\$26.13	\$32.66	\$39.19	50%	6%	2.2%
115	\$27.70	\$34.62	\$41.54	50%	6%	2.2%
116	\$29.36	\$36.70	\$44.04	50%	6%	2.2%
117	\$31.12	\$38.90	\$46.68	50%	6%	2.2%
118	\$32.99	\$41.23	\$49.48	50%	6%	2.2%
119	\$34.97	\$43.71	\$52.45	50%	6%	2.2%
120	\$37.06	\$46.33	\$55.60	50%	6%	2.2%
121	\$39.29	\$49.11	\$58.93	50%	6%	2.2%
122	\$41.64	\$52.06	\$62.47	50%	6%	2.2%
123	\$44.14	\$55.18	\$66.22	50%	6%	2.2%
124	\$46.79	\$58.49	\$70.19	50%	6%	2.2%
125	\$49.60	\$62.00	\$74.40	50%	6%	2.2%
126	\$52.58	\$65.72	\$78.86	50%	6%	2.2%
127	\$55.73	\$69.66	\$83.59	50%	6%	2.2%



EXHIBIT 5C
PROPOSED PAY PLAN STEPS – CLASSIFIED EMPLOYEES

Years	0	1	2 to 3	4 to 5	6 to 7	8 to 9	10 to 11	12 to 13	14 to 15	16 to 17
Grades	1	2	3	4	5	6	7	8	9	10
101	\$12.25	\$12.51	\$12.78	\$13.06	\$13.34	\$13.63	\$13.92	\$14.22	\$14.53	\$14.84
102	\$12.99	\$13.27	\$13.55	\$13.84	\$14.14	\$14.45	\$14.76	\$15.08	\$15.40	\$15.73
103	\$13.76	\$14.06	\$14.36	\$14.67	\$14.99	\$15.31	\$15.64	\$15.98	\$16.33	\$16.68
104	\$14.59	\$14.90	\$15.23	\$15.55	\$15.89	\$16.23	\$16.58	\$16.94	\$17.31	\$17.68
105	\$15.47	\$15.80	\$16.14	\$16.49	\$16.84	\$17.21	\$17.58	\$17.96	\$18.34	\$18.74
106	\$16.39	\$16.75	\$17.11	\$17.48	\$17.85	\$18.24	\$18.63	\$19.03	\$19.45	\$19.86
107	\$17.38	\$17.75	\$18.13	\$18.53	\$18.93	\$19.33	\$19.75	\$20.18	\$20.61	\$21.06
108	\$18.42	\$18.82	\$19.22	\$19.64	\$20.06	\$20.49	\$20.94	\$21.39	\$21.85	\$22.32
109	\$19.52	\$19.95	\$20.38	\$20.82	\$21.26	\$21.72	\$22.19	\$22.67	\$23.16	\$23.66
110	\$20.70	\$21.14	\$21.60	\$22.06	\$22.54	\$23.03	\$23.52	\$24.03	\$24.55	\$25.08
111	\$21.94	\$22.41	\$22.89	\$23.39	\$23.89	\$24.41	\$24.93	\$25.47	\$26.02	\$26.58
112	\$23.25	\$23.76	\$24.27	\$24.79	\$25.33	\$25.87	\$26.43	\$27.00	\$27.58	\$28.18
113	\$24.65	\$25.18	\$25.72	\$26.28	\$26.85	\$27.42	\$28.02	\$28.62	\$29.24	\$29.87
114	\$26.13	\$26.69	\$27.27	\$27.86	\$28.46	\$29.07	\$29.70	\$30.34	\$30.99	\$31.66
115	\$27.70	\$28.29	\$28.90	\$29.53	\$30.16	\$30.81	\$31.48	\$32.16	\$32.85	\$33.56
116	\$29.36	\$29.99	\$30.64	\$31.30	\$31.97	\$32.66	\$33.37	\$34.09	\$34.82	\$35.57
117	\$31.12	\$31.79	\$32.48	\$33.18	\$33.89	\$34.62	\$35.37	\$36.13	\$36.91	\$37.71
118	\$32.99	\$33.70	\$34.42	\$35.17	\$35.93	\$36.70	\$37.49	\$38.30	\$39.13	\$39.97
119	\$34.97	\$35.72	\$36.49	\$37.28	\$38.08	\$38.90	\$39.74	\$40.60	\$41.47	\$42.37
120	\$37.06	\$37.86	\$38.68	\$39.51	\$40.37	\$41.24	\$42.13	\$43.04	\$43.96	\$44.91
121	\$39.29	\$40.13	\$41.00	\$41.88	\$42.79	\$43.71	\$44.65	\$45.62	\$46.60	\$47.61
122	\$41.64	\$42.54	\$43.46	\$44.40	\$45.36	\$46.33	\$47.33	\$48.35	\$49.40	\$50.46
123	\$44.14	\$45.10	\$46.07	\$47.06	\$48.08	\$49.11	\$50.17	\$51.26	\$52.36	\$53.49
124	\$46.79	\$47.80	\$48.83	\$49.89	\$50.96	\$52.06	\$53.18	\$54.33	\$55.50	\$56.70
125	\$49.60	\$50.67	\$51.76	\$52.88	\$54.02	\$55.18	\$56.37	\$57.59	\$58.83	\$60.10
126	\$52.58	\$53.71	\$54.87	\$56.05	\$57.26	\$58.50	\$59.76	\$61.05	\$62.36	\$63.71
127	\$55.73	\$56.93	\$58.16	\$59.41	\$60.70	\$62.01	\$63.34	\$64.71	\$66.10	\$67.53



EXHIBIT 5C (CONTINUED)
PROPOSED PAY PLAN STEPS – CLASSIFIED EMPLOYEES

Years	18 to 19	20 to 21	22 to 23	24 to 25	26 to 27	28 to 29	30 to 31	32 to 33	34 to 35	36+
Grades	11	12	13	14	15	16	17	18	19	20
101	\$15.16	\$15.49	\$15.83	\$16.17	\$16.52	\$16.87	\$17.24	\$17.61	\$17.99	\$18.38
102	\$16.07	\$16.42	\$16.77	\$17.14	\$17.51	\$17.88	\$18.27	\$18.66	\$19.07	\$19.48
103	\$17.04	\$17.41	\$17.78	\$18.16	\$18.56	\$18.96	\$19.37	\$19.78	\$20.21	\$20.65
104	\$18.06	\$18.45	\$18.85	\$19.25	\$19.67	\$20.09	\$20.53	\$20.97	\$21.42	\$21.88
105	\$19.14	\$19.56	\$19.98	\$20.41	\$20.85	\$21.30	\$21.76	\$22.23	\$22.71	\$23.20
106	\$20.29	\$20.73	\$21.18	\$21.63	\$22.10	\$22.58	\$23.06	\$23.56	\$24.07	\$24.59
107	\$21.51	\$21.97	\$22.45	\$22.93	\$23.43	\$23.93	\$24.45	\$24.98	\$25.51	\$26.07
108	\$22.80	\$23.29	\$23.80	\$24.31	\$24.83	\$25.37	\$25.92	\$26.47	\$27.05	\$27.63
109	\$24.17	\$24.69	\$25.22	\$25.77	\$26.32	\$26.89	\$27.47	\$28.06	\$28.67	\$29.29
110	\$25.62	\$26.17	\$26.74	\$27.31	\$27.90	\$28.50	\$29.12	\$29.75	\$30.39	\$31.04
111	\$27.16	\$27.74	\$28.34	\$28.95	\$29.58	\$30.21	\$30.87	\$31.53	\$32.21	\$32.91
112	\$28.79	\$29.41	\$30.04	\$30.69	\$31.35	\$32.03	\$32.72	\$33.42	\$34.14	\$34.88
113	\$30.51	\$31.17	\$31.84	\$32.53	\$33.23	\$33.95	\$34.68	\$35.43	\$36.19	\$36.97
114	\$32.34	\$33.04	\$33.75	\$34.48	\$35.23	\$35.99	\$36.76	\$37.55	\$38.37	\$39.19
115	\$34.28	\$35.02	\$35.78	\$36.55	\$37.34	\$38.14	\$38.97	\$39.81	\$40.67	\$41.54
116	\$36.34	\$37.13	\$37.93	\$38.74	\$39.58	\$40.43	\$41.31	\$42.20	\$43.11	\$44.04
117	\$38.52	\$39.35	\$40.20	\$41.07	\$41.95	\$42.86	\$43.78	\$44.73	\$45.69	\$46.68
118	\$40.83	\$41.71	\$42.61	\$43.53	\$44.47	\$45.43	\$46.41	\$47.41	\$48.43	\$49.48
119	\$43.28	\$44.22	\$45.17	\$46.15	\$47.14	\$48.16	\$49.20	\$50.26	\$51.34	\$52.45
120	\$45.88	\$46.87	\$47.88	\$48.91	\$49.97	\$51.05	\$52.15	\$53.27	\$54.42	\$55.60
121	\$48.63	\$49.68	\$50.75	\$51.85	\$52.97	\$54.11	\$55.28	\$56.47	\$57.69	\$58.93
122	\$51.55	\$52.66	\$53.80	\$54.96	\$56.14	\$57.36	\$58.59	\$59.86	\$61.15	\$62.47
123	\$54.64	\$55.82	\$57.03	\$58.26	\$59.51	\$60.80	\$62.11	\$63.45	\$64.82	\$66.22
124	\$57.92	\$59.17	\$60.45	\$61.75	\$63.08	\$64.45	\$65.84	\$67.26	\$68.71	\$70.19
125	\$61.40	\$62.72	\$64.08	\$65.46	\$66.87	\$68.31	\$69.79	\$71.29	\$72.83	\$74.40
126	\$65.08	\$66.49	\$67.92	\$69.39	\$70.88	\$72.41	\$73.97	\$75.57	\$77.20	\$78.86
127	\$68.99	\$70.48	\$72.00	\$73.55	\$75.13	\$76.76	\$78.41	\$80.10	\$81.83	\$83.59

Evergreen then slotted each proposed classification into the appropriate pay range in the pay plan. Both internal and external equity were analyzed when slotting the classifications. Assigning pay grades to classifications requires a balance of internal equity, desired market position, and recruitment and retention concerns. Thus, market range data shown in **Chapter 4** were not the sole criteria for the proposed pay ranges. Some classifications' grade assignments varied from their associated market range due to the other factors mentioned above. **Exhibit 5D** shows the proposed pay grades for all classifications.



EXHIBIT 5D
PROPOSED PAY GRADES – CLASSIFIED EMPLOYEES

Proposed Grade	Proposed Min	Proposed Max	Proposed Classification Title
101	\$12.25	\$18.38	CROSSING GUARD SFS LUNCHROOM MONITOR
102	\$12.99	\$19.48	BUS AIDE/MONITOR BUS/VAN DRIVER CENTRAL KITCHEN NUTRITION ASSISTANT HALL MONITOR SFS CASHIER SFS NUTRITION ASSISTANT
103	\$13.76	\$20.65	CUSTODIAN M&O SCHOOL CUSTODIAN
104	\$14.59	\$21.88	CROSSING GUARD COORDINATOR CROSSING GUARD SUPERVISOR FIELD TRIP COORD GROUNDSKEEPER I WAREHOUSE ASSISTANT I WELLNESS CENT COORD
105	\$15.47	\$23.20	BUILDING COORD GROUNDSKEEPER II MAIL CARRIER MATERIAL HANDLING SPECIALIST PARA COM LAB PARA INSTRUCTIONAL PARA ISS PARA KINDERGARTEN PARA PBIS PARA PRE-K PARA SCH IMPRV PARA SPED PARA SPED PRE-K PARA SPED/ACCESS PARA SPED/BSE PARA SPED/DIRECT SUPPORT PARA SPED/INTER PARAPROFESSIONAL SCHOOL CUSTODIAN HEAD SOCIAL WORKER INTERN



EXHIBIT 5D (CONTINUED)
PROPOSED PAY GRADES – CLASSIFIED EMPLOYEES

Proposed Grade	Proposed Min	Proposed Max	Proposed Classification Title
106	\$16.39	\$24.59	CAMPUS POLICE COMMUNICATION OFFICER GROUNDSKEEPER III MAINTANANCE DISPATCHER/CLE MEDIA CLERK RADIO DISPATCHER SCHOOL CLERK
107	\$17.38	\$26.07	CAMPUS POLICE COMMUNICATION SUPERVISOR CNA TECHNICIAN CUSTODIAL EQUIPMENT TECHNICIAN FAMILY ENGAGE FACIL HVAC TECHNICIAN ASSISTANT PE EQUIPMENT SERVICE WORKER RECEIVING CLERK II SFS NUTRITION TEAM LEAD WAREHOUSE ASSISTANT FOREMAN
108	\$18.42	\$27.63	CARPENTER I HEARING CLERK HR PERSONNEL ASSISTANT HR SUPPORT ASSISTANT PSYCHOLOGIST-INTERN RECEPTIONIST RECORDS MANAGEMENT CLERK ROUTER SCH BOOKKEEPER
109	\$19.52	\$29.29	BUS DRIVER CTAE ASSISTANT GNETS PROGRAM ASSISTANT PAINTER PARA SIGN SUPPORT SPECIALIST SCH REGISTRAR ES SCH REGISTRAR NORTHWOODS SECRETARY II - GNETS



EXHIBIT 5D (CONTINUED)
PROPOSED PAY GRADES – CLASSIFIED EMPLOYEES

Proposed Grade	Proposed Min	Proposed Max	Proposed Classification Title
110	\$20.70	\$31.04	ACCOUNTING CLERK IV ACCTS PAYABLE ASSISTANT INVENTORY PURCHASING SPECIALIST MECHANIC ASSISTANT PAYROLL ASSISTANT PLUMBER I SCH REGISTRAR HCCA SCH REGISTRAR HS SCH REGISTRAR MS SCH REGISTRAR SOAR
111	\$21.94	\$32.91	ADMINISTRATIVE ASSISTANT I CARPENTER II CENTRAL KITCHEN MANAGER DISPATCH MANAGER ELECTRICIAN I GROUNDS ASSIST SUPERVISOR HR BENEFITS SPECIALIST HR CERTIFIED SPECIALIST HR CLASSIFIED SPECIALIST HR FMLA SPECIALIST HR RETIREMENT SPECIALIST HVAC TECHNICIAN I INVENTORY COORD LOCKSMITH NUTRITION INVENTORY MANAGER PLUMBER II PURCHASE ASSISTANT I SCH SECRETARY SFS NUTRITION MANAGER - MS/HS STUDENT ENGAGE FACIL ARP



EXHIBIT 5D (CONTINUED)
PROPOSED PAY GRADES – CLASSIFIED EMPLOYEES

Proposed Grade	Proposed Min	Proposed Max	Proposed Classification Title
112	\$23.25	\$34.88	ATHLETIC TRAINER ARP BUDGET ASSISTANT CAMPUS POLICE OFFICER ELECTRICIAN II ELECTRONICS TECHNICIAN II FINANCIAL ASSISTANT HVAC TECHNICIAN II MECHANIC-TRANSPORT PC NETWORK TECHNICIAN II PROGRAM SUPPORT SPECIALIST PURCHASE ASSISTANT II SFS NUTRITION MANAGER - ELEMENTARY SFS NUTRITION MANAGER FL TECHNICAL TRAINER
113	\$24.65	\$36.97	ADMINISTRATIVE ASSISTANT II AFTER SCH COORD COACH HS CAREER COORD SAFETY & TRAIN FOREMAN-TRANSPORT HR PERSONNEL PROCESSING SPECIALIST LEAD PAYROLL ASSISTANT PE EQUIPMENT SERVICE SUPERVISO WAREHOUSE FOREMAN
114	\$26.13	\$39.19	CONSTRUCTION CONTRACT SPECIALIST ENERGY SPECIALIST GRAD COACH ARP GROUNDS SUPERVISOR LEAD INTERPRETER/SCHEDULER NUTRITION TRAINING SPECIALIST PC NETWORK TECHNICIAN III ROUTE SUPERVISOR SCH NURSE SCH NURSE SPED SCH SITE SUPPORT AREA MANAGER SOFTWARE SUPPORT COORD STUDENT INFORMATION SYSTEM SPECIALIST STUDENT SUPPORT ADVOCATE ARP STUDENT TRANSITION SPECIALIST



EXHIBIT 5D (CONTINUED)
PROPOSED PAY GRADES – CLASSIFIED EMPLOYEES

Proposed Grade	Proposed Min	Proposed Max	Proposed Classification Title
115	\$27.70	\$41.54	ACCOUNTANT AFTER SCH-DATA MANAGER 21ST CC BUDGET COORD CAMPUS POLICE INVESTIGATOR CAMPUS POLICE SERGEANT CARPENTER SUPERVISOR ELECTRICIAN SUPERVISOR FLEET MANAGER GRANTS MANAGER HR SALARY SPECIALIST HR WORKERS COMP SPECIALIST HVAC SUPERVISOR LEA MENTAL HLTH CLINICIAN PLUMBING SUPERVISOR PUBLIC RELATIONS SPECIALIST SCH ADMIN MANAGER SYSTEM ADMINISTRATOR I – ELECT
116	\$29.36	\$44.04	CUSTODIAL SERVICES COORD EDU SUPPORT SPECIALIST EXECUTIVE ASSISTANT FINANCIAL ASSIST TO CFO HOMELESS/MIGRANT LIASON ASSIST LEARNING MANAGEMENT SYSTEM SPEC MAINTANANCE COORD PURCHASING AGENT SIS SUPPORT STUDENT INFORMATION SYSTEM MAN SYSTEM ADMIN II
117	\$31.12	\$46.68	GIS ROUTING SPECIALIST
118	\$32.99	\$49.48	CAREER COACH SUPERVISOR FAMILY ENGAGEMENT FACILITATOR FAMILY ENGAGEMENT SPECIALIST GRANTS COORD INTERPRETER PROJECT AWARE COORD SYSTEM ADMIN III



EXHIBIT 5D (CONTINUED)
PROPOSED PAY GRADES – CLASSIFIED EMPLOYEES

Proposed Grade	Proposed Min	Proposed Max	Proposed Classification Title
119	\$34.97	\$52.45	CONSTRUCTION COORD DATA ADMINISTRATOR FAMILY ENGAGE COORD HR BENEFITS COORD HR COORD INSTRUCTIONAL TECHNOLOGY SPECIALIST SITE SUPPORT SUPERVISOR TECHNOLOGY SYSTEM SPECIALIST YOUTH APPRENT COORD
120	\$37.06	\$55.60	DEP CHIEF CAMPUS POLICE
121	\$39.29	\$58.93	NETWORK ENGINEER II OCCUP THERAPIST ASSIST REGISTERED DIETITIAN SCH NUTRITION FINANCE MANAGER SUPERVISOR PAYROLL
122	\$41.64	\$62.47	ACCOUNTING MANAGER CONSTRUCTION OPERATIONS MANAGER CONSTRUCTION PROJECT MANAGER OCCUP THERAPIST PHYSICAL THERAPIST PLANT MANAGER SENIOR ANALYST
123	\$44.14	\$66.22	DIRECTOR BUDGET DIRECTOR II SAFETY AND SECURITY DIRECTOR II TECHNOLOGY DIRECTOR II, SCHOOL NUTRITION DIRECTOR III MAINTANANCE/GROUN DIRECTOR III PROCUREMENT DIRECTOR III TRANSPORTION NETWORK ENGINEER III NETWORK SECURE COORD
124	\$46.79	\$70.19	EXEC DIRECTOR ACCOUNTING EXEC DIRECTOR CAPITAL PROGRAMS EXEC DIRECTOR HR
125	\$49.60	\$74.40	CHIEF COMMUNICATIONS OFFICER CHIEF FINANCIAL OFFICER CHIEF OF POLICE



5.3 IMPLEMENTATION

RECOMMENDATION 3: Evergreen recommends the District adopt a methodology to transition employee salaries into the proposed pay plan that aligns with its established compensation philosophy and meets the available financial resources of the institution.

After assigning pay grades to classifications, the next step was to develop appropriate methods (options) for transitioning employees' salaries into the proposed plans. This was done utilizing equitable methods (options) for calculating salaries in the plans and determining whether adjustments were necessary to individual salaries to bring them to their calculated salary. Evergreen calculated and provided various transition methods for implementing the new plan. Descriptions of these methods are found in **Exhibit 5E**.

EXHIBIT 5E IMPLEMENTATION OPTIONS AND DESCRIPTIONS

Implementation Option	Description
Bring to New Minimum/Closest Step	A calculation is performed so that each employee's salary is adjusted to the minimum of their classification's proposed pay grade. If their salary is already within the proposed pay range, no adjustment is made. The employee is then moved to the next highest/closest step.
Class Year Parity	This option aims to re-align an employee's salary within their recommended range based on how long they have worked in their current classification. This is done on the basis of 30-year career trajectory, where an employee with 15 years of experience would be placed at the midpoint, whereas an employee with 30 or more years would be at maximum. The employee is then moved to the next highest/closest step.
Years of Experience	This option places employees on the step that correlates to their years of experience as determined by the HR department.

Exhibit 5F illustrates the total implementation costs associated with the various methods. Please note these costs are based on a three-year implementation plan.



EXHIBIT 5F
TOTAL IMPLEMENTATION COSTS – 3 YEAR PLAN

Implementation Option	Total Implementation Cost	# Employees Receiving Adjustments	Average Salary Adjustment
Bring to New Minimum	\$810,280.15	1493	\$542.72
Class Year Parity	\$4,357,900.57	1493	\$2,918.89
Years of Experience	\$6,009,809.68	1493	\$4,025.32

5.4 SYSTEM ADMINISTRATION

The District's compensation system will continue to require periodic maintenance. The recommendations provided to improve the competitiveness of the plan were developed based on conditions at the time the data were collected. While it is likely under current market conditions that there will be fewer changes in salary, it is important to monitor for any recruitment and retention issues that may arise among critical/highly skilled positions.

RECOMMENDATION 4: Conduct small-scale salary surveys as needed to assess the market competitiveness of hard-to-fill classifications and/or classifications with retention issues and make changes to pay grade assignments if necessary.

Some classifications' pay grades may need to be reassigned as the market continues to change. If one or more classifications are exhibiting high turnover or are having difficulty with recruitment, the District should collect salary range data from peer organizations to determine whether an adjustment is needed for the pay grade of the classification(s). If increasing a classification's pay grade based on market data does not help with the recruitment and/or retention issues, it may be necessary for the District to offer incentives to attract employees to the position and/or to encourage employees to remain in the position.

RECOMMENDATION 5: Conduct a comprehensive classification and compensation study every three to five years.

Small-scale salary surveys can improve the market position of specific classifications, but it is recommended that a full classification and compensation study be conducted every three to five years to preserve both internal and external equity. Changes to classification and compensation do occur, and while the increments of change may seem minor, they can compound over time. A failure to react to these changes quickly has the potential to place the District in less than desirable position for recruiting and retaining quality employees.

RECOMMENDATION 6: Review and revise, as appropriate, guidelines for progressing employee salaries through the pay plan, including those for determining salaries of newly hired employees and employees who have been promoted or transferred to a different classification or department.



The method of moving salaries through the pay plan and setting new salaries for new hires and promotions depends largely on an organization's compensation philosophy. It is important for the District to maintain guidelines for each of these situations, and to ensure that they are followed consistently for all employees. Common practices for progressing and establishing employee salaries are outlined below.

New Hire Salaries

Typically, an employee holding the minimum education and experience requirements for an existing classification is hired at or near the classification's pay grade minimum. Sometimes, for recruiting purposes an organization might need to consider the ability to offer salaries to new employees that consider prior related experience. It is recommended that the District continue its current practices of establishing new hire salaries while preserving the internal equity of employees' salaries within each classification to the extent possible. Current employees' salaries should be improved to some degree with implementation of the new plans and the proposed potential adjustments to employees' salaries.

Salary Progression

There are several common methods for salary progression including cost of living adjustments (COLA)/across the board and performance-based. It is recommended that the District evaluate annually whether a COLA needs to be applied (to both the pay plan and employees' salaries) to keep up with cost of living. It is also recommended that the District continuously evaluate its practices to progress employees' salaries, and if necessary, make improvements to preserve equitable pay practices, particularly in the administration of the employee performance evaluation process.

Promotions

When an employee is promoted to a new classification, it is important to have guidelines for calculating the employee's new salary that rewards the employee for his or her new responsibilities, moving the salary into the new pay grade, and ensuring internal equity in the new classification. For example, a range of five to seven percent increase is common today, with consideration given to preserving the internal equity of employees' salaries within the classification.

5.5 SUMMARY

The recommendations in this chapter provide an update to the compensation and classification system for the District. If implemented, the recommendations will enhance the District's competitiveness in the labor market. By implementing the revised market pay plans, it will have a responsive compensation system for several years to come. While the upkeep of this will require work, the District will find that having a more competitive system that enhances strong recruitment and employee retention is well worth this commitment.



Section D

Required Forms



D. Required Forms

As required in the Request for Proposals (RFP), we have attached the following required forms:

- Attachment II, Required Provisions Certification, signed by the authorized representative
- Completed Application for Vendor Status
- Attachment III, Notice of Conflict of Interest
- Attachment IV, Vendor Contact Information
- Attachment V, Proposer's Reference Forms
- Attachment VI, Local Preference Affidavit
- Attachment VII, Subcontracting Form (not applicable)
- Attachment VIII, Drug-Free Workplace Certification
- Attachment IX, Certification Regarding Debarment
- Attachment X, Certification Regarding Lobbying

Attachment II Required Provisions Certifications

1. Business/Corporate Experience

This is to certify that the Proposer:

- a. Is duly licensed in the State of Florida;
- b. Has a minimum of five (5) years continuous experience successfully providing classification and compensation study services to clients of a similar size and scope as the District, preferably in the public sector; and
- c. Has successfully provided classification and compensation study services to at least three (3) accounts of a similar size and scope as the District, preferably in the public sector.

2. Prime Vendor

This is to certify that the Successful Proposer will act as the Prime Contractor to the District for all services provided under the Contract(s).

3. Meets Legal Requirements

This is to certify that the Proposer's Proposal and all services provided under the Contract will be compliant with all laws, rules, and other authority applicable to providing the services, including, but not limited to, Florida's Open Government laws (Article I, Section 24, Florida Constitution, Chapter 119, F.S.).

4. Financial Disclosure

This is to certify that the Proposer has disclosed in their Proposal all suspensions, revocations, bankruptcies, judgments, or liens in the last five (5) years.

5. Federal Debarment

This is to certify that neither the Proposer, nor its principles, is currently disbarred, suspended, proposed for disbarment, declared ineligible, or voluntarily excluded from participation in this solicitation by any Federal department or agency.

6. Conflict of Interest

Per Section 1001.42(12)(i), F.S., this certifies that no member of the Leon County School Board or the Superintendent has any financial interest in the Proposer whatsoever.

7. Statement of No Inducement

This is to certify that no attempt has been made or will be made by the Proposer to induce any other person or Contractor to submit or not to submit a Proposal with regards to this RFP. Furthermore, this is to certify that the Proposal contained herein is submitted in good faith and not subject to any agreement or discussion with, or inducement from, any Contractor or person to submit a complementary or other non-competitive Proposal.

8. Statement of Non-Disclosure

This is to certify that none of the contents of this Proposal have been disclosed before award, directly or indirectly, to any other Proposer or competitor.

9. Statement of Non-Collusion

This is to certify that the proposed costs in this Proposal have been arrived at independently, without consultation, communications, or agreement as to any matter relating to such costs with any other Proposer or with any competitor, and not to restrict competition.

10. Scrutinized Companies Certification

The Proposer certifies they are not listed on the Scrutinized Companies that Boycott Israel List, created under Section 215.4725, F.S., and they are not currently engaged in a boycott of Israel. If the resulting Contract exceeds \$1,000,000.00 in total, not including renewal years, the Proposer certifies that they are not listed on either the Scrutinized Companies with Activities in Sudan List, or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List created under Sections 215.473, F.S., and 215.4725, F.S., and further certifies they are not engaged in business operations in Cuba or Syria. In compliance with Sections 287.135(5), F.S., and 287.135(3), F.S., the Proposer agrees the District may immediately terminate the resulting Contract for cause if the Proposer is found to have submitted a false certification or if the Proposer is placed on the Scrutinized Companies with Activities in Sudan List, the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List, the Scrutinized Companies that Boycott Israel List, or is engaged in a boycott of Israel, or has engaged in business operations in Cuba or Syria during the term of the Contract. Any company that submits a bid or proposal for a contract, or intends to enter into or renew a contract with an agency or local governmental entity for commodities or services, of any amount, must certify that the company is not participating in a boycott of Israel.

By signing this certification below, the Authorized Representative affirms they have the authority to bind the Proposer and acknowledges and affirms the statements above.

STATE OF FLORIDA

COUNTY OF Leon

Dr. Jeff Long
Authorized Representative (Print)

[Signature]
Authorized Representative (Signature)

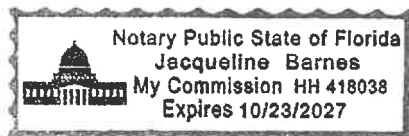
The foregoing instrument was acknowledged before me by means of ☒ physical presence or ☐ online notarization this 8th day of Jan, 2024, by Dr. Jeff Long (name of authorized representative) as President (position title) for Energize Solutions (Vendor Name).

Jacqueline Barnes
Notary Signature

(NOTARY SEAL)

Jacqueline Barnes
Name of Notary (Typed, Printed, or Stamped)

Personally Known ☒ OR Produced Identification ☐ Type of Identification _____





2757 West Pensacola Street – Tallahassee, FL 32304-2998
FAX TO: (850) 487-7869 or EMAIL TO: BurnsC@leonschools.net

APPLICATION FOR VENDOR STATUS
(IRS W-9 Facsimile)

COMPANY NAME: Evergreen Solutions, LLC ☐ New Vendor ☒ Update
CONTACT PERSON: Kelly Tucker LCSB Employee: ☐ YES ☒ NO
PHONE NUMBER: 850-383-0111 FAX NUMBER: 850-383-1511
CORRESPONDENCE ADDRESS: 2528 Barrington Circle, Unit 201
CITY: Tallahassee STATE: FL ZIP + 4: 32308-8710

REMITTANCE INFORMATION
(if different from above)

CONTACT PERSON: _____
REMITTANCE ADDRESS: _____
CITY: _____ STATE: _____ ZIP + 4: _____
EMAIL ADDRESS: _____ WEBSITE: _____

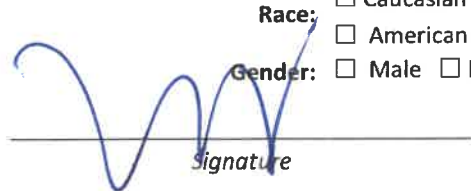
PLEASE CHECK THE APPROPRIATE BOX:

PLEASE CHECK THE APPROPRIATE BOX: ☐ Individual/ Sole Proprietor ☐ S Corporation ☐ C Corporation ☐ Partnership
☐ Other _____ ☒ LLC – Type (Check one) ☐ C ☐ S ☒ P
TAX ID NUMBER: 20-1833438 or _____
Federal Employer Identification Number Social Security Number

Section 6109 of the Internal Revenue Service Code requires you to provide your correct TIN to persons, businesses, or agencies that are required to file information returns with the IRS. Purchase orders will not be issued to vendors who fail to provide a TIN.

PLEASE INDICATE THE FOLLOWING:

*Minority Vendor? ☐ Yes ☒ No **If yes, certification is required – (Please submit with form)*
Race: ☐ Caucasian ☐ Hispanic ☐ African American
☐ American Indian ☐ Asian ☐ Other: _____
Gender: ☐ Male ☐ Female


Signature

Dr. Jeff Ling 01/05/2024
Print Name Date

LCSB site contact requesting vendor: _____
Name Phone & Email

For LCSB Employee Use Only

Entered by: _____ Date entered: _____

Request for Taxpayer Identification Number and Certification

Give Form to the
requester. Do not
send to the IRS.

Print or type See Specific Instructions on page 2.	1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank. Evergreen Solutions, LLC	
	2 Business name/disregarded entity name, if different from above	
	3 Check appropriate box for federal tax classification; check only one of the following seven boxes: <input type="checkbox"/> Individual/sole proprietor or single-member LLC <input type="checkbox"/> C Corporation <input type="checkbox"/> S Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Trust/estate <input checked="" type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=partnership) ▶ P Note. For a single-member LLC that is disregarded, do not check LLC; check the appropriate box in the line above for the tax classification of the single-member owner. <input type="checkbox"/> Other (see instructions) ▶	
	4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3): Exempt payee code (if any) _____ Exemption from FATCA reporting code (if any) _____ <small>(Applies to accounts maintained outside the U.S.)</small>	
	5 Address (number, street, and apt. or suite no.) 2528 Barrington Circle, Unit 201	Requester's name and address (optional)
6 City, state, and ZIP code Tallahassee, Florida 32308		
7 List account number(s) here (optional)		

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the Part I instructions on page 3. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN* on page 3.

Note. If the account is in more than one name, see the instructions for line 1 and the chart on page 4 for guidelines on whose number to enter.

Social security number								
			-				-	
or								
Employer identification number								
2	0	-	1	8	3	3	4	3
8								

Part II Certification

Under penalties of perjury, I certify that:

- The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
- I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
- I am a U.S. citizen or other U.S. person (defined below); and
- The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions on page 3.

Sign Here	Signature of U.S. person ▶	Date ▶ 1/5/2024
-----------	----------------------------	------------------------

General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. Information about developments affecting Form W-9 (such as legislation enacted after we release it) is at www.irs.gov/fw9.

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following:

- Form 1099-INT (interest earned or paid)
- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)

- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See *What is backup withholding?* on page 2.

By signing the filled-out form, you:

- Certify that the TIN you are giving is correct (or you are waiting for a number to be issued).
- Certify that you are not subject to backup withholding, or
- Claim exemption from backup withholding if you are a U.S. exempt payee. If applicable, you are also certifying that as a U.S. person, your allocable share of any partnership income from a U.S. trade or business is not subject to the withholding tax on foreign partners' share of effectively connected income. and
- Certify that FATCA code(s) entered on this form (if any) indicating that you are exempt from the FATCA reporting, is correct. See *What is FATCA reporting?* on page 2 for further information.



Leon County Schools Authorization for ACH Direct Payment

Finance Department

2757 West Pensacola Street, Tallahassee, Florida 32304

Payee/Vendor Name Evergreen Solutions, LLC
Address 2528 Barrington Circle, Unit 201
City, State Zip Tallahassee, Florida 32308
Telephone 850-383-0111
Contact Name Kelly Tucker, VP of Marketing
Contact e-mail kelly@consultevergreen.com

(for ACH remittance notification)

Complete this section for new enrollments or for financial institution or account changes.

Select one: ☐ New Enrollment ☐ Financial Institution or Account Change

Bank Name _____

Branch (if applicable) Same as what was filed earlier

City, State Zip _____

Transit/Routing Number _____

Bank Account Number _____

Account Type (check one) ☐ Checking OR ☐ Savings

Account Type (check one) ☐ Personal OR ☐ Business

I, the undersigned, authorize Leon County Schools to deposit payments directly to the account indicated above and to correct any errors which may occur from the transactions. I also authorize the financial institution named above to post these transactions to that account. This authorization will remain in force until Leon County Schools receives written notice of cancellation from me. I acknowledge that the origination of ACH transactions to my account must comply with the provisions of U.S. law.

Signature _____

Date 01/05/2024

Name (printed) Dr. Jeff Ling

Title President

Complete this section to CANCEL your ACH electronic deposit authorization.

I, the undersigned, hereby cancel the authorization for the Leon County Schools Finance to originate ACH electronic deposit entries into my checking/savings account. This cancellation is effective as soon as Leon County Schools Finance has reasonable time to act upon it.

Signature _____

Date _____

Name (printed) _____

Title _____

Mail the completed form to the address above or email to chavez@leonschools.net.

For LCS use only

Vendor Name _____

Date Received _____

Solicitation Number: RFP 241-2024

To participate in this solicitation process and comply with the provisions of Chapter 112.313, Florida Statutes, the undersigned corporate officer hereby discloses the following information to the Leon County School Board.

Section I

I hereby certify that no official or employee of the School Board requiring the goods or services described in these specifications has a material financial interest in this company.

Authorized Representative (Signature)

Dr. Jeff Long
Authorized Representative (Print)

Section 2

I hereby certify that the following named Leon County School Board official(s) and employee(s) have a material financial interest(s) (over 5%) in this company, and they have filed Conflict of Interest Statements with the Leon County Supervisor of Elections, before the Proposal Opening.

Name	Title/Position	Date of Filing

Authorized Representative (Signature)

Authorized Representative (Print)

Date _____

District-Wide Classification and Compensation Study

Attachment IV
Proposer Contact Information

The Proposer shall identify the contact information for solicitation and contractual purposes via the requested fields in the table below.

	For solicitation purposes, the Proposer's representative shall be:	For contractual purposes, should the Proposer be awarded, the Proposer's representative shall be:
Name:	Dr. Jeff Ling	Dr. Jeff Ling
Title:	President	President
Street Address:	2528 Barrington Cir	2528 Barrington Cir
City, State, Zip code	Tallah, FL 32308	Tallah, FL 32308
Telephone: (Office)	850.383.0111	850.383.0111
Telephone: (Cell)	850.692.7510	850.692.7510
Email:	jeff@consultevergreen.com	jeff@consultevergreen.com

Evergreen Solutions

Company Name

20-1833438

FEIN #

Authorized Representative (Signature)

Dr. Jeff Ling

Authorized Representative (Printed)

1/8/2024

Date

**Attachment V
Proposer's Reference Form**

In the spaces provided below, the Proposer shall list all names under which it has operated during the past five (5) years.

Evergreen Solutions, LLC

On the following pages, the Proposer shall provide the information indicated for three (3) separate and verifiable references. The references listed must be for businesses or government entities for whom the Proposer has provided services of similar scope and size to the services identified in the RFP. The same reference may not be listed for more than one (1) organization, and confidential references shall not be included. In the event the Proposer has had a name change since the time work was performed for a listed reference, the name under which the Proposer operated at that time must be provided in the space provided for the Proposer's Name.

References that are listed as subcontractors in the response will not be accepted as references under this solicitation. Additionally, References shall pertain to current and ongoing services or those that were completed before January 1, 2023. References shall not be given by:

- Persons currently or formerly employed or supervised by the Proposer or its affiliates.
- Board members within the Proposer's organization.
- Relatives of any of the above.

Additionally, the District reserves the right to contact references other than those identified by the Proposer to obtain additional information regarding past performance.

District-Wide Classification and Compensation Study

Proposer's Reference Form

Reference #1

Proposer Name: Bibb County School District, Georgia

Reference Company Name: Evergreen Solutions, LLC

Address: 484 Mulberry Street, Suite 501, Macon, Georgia 31201

Primary Contact Person: Emanuel M. Frazier Jr. Alternate Contact Person: _____

Primary Contact Title: Assistant Superintendent of Human Resources Alternate Contact Title: _____

Primary Contact Phone: (478) 765-8668 Alternate Contact Phone: _____

Primary Contact Email: Emanuel.Frazier@bcsdk12.net Alternate Contact Email: _____

Contract Performance Period: 12/2/2022 – 4/30/2023 Location of Services: Macon, GA

Brief description of the services performed for this reference:

Evergreen conducted a Classification and Compensation Study. Evergreen conducted a job analysis of classified staff and collected market data from comparable schools districts to develop appropriate position specifications and salary ranges with a tiered career pathway for the Bibb County School District. The study provided recommendations and updates to address both internal and external inequities.

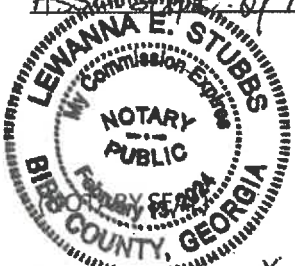
Overall contract performance: ☐ Poor ☐ Fair ☐ Adequate ☐ Good ☒ Excellent

Would you contract with this vendor again? Yes ☒ No ☐

Emanuel Frazier
Primary Reference Contact Signature

1/5/24
Date

The foregoing instrument was acknowledged before me by means of ☒ physical presence or ☐ online notarization this 4th day of January, 2024, by Emanuel Frazier (name of authorized representative) as Asst. Supt. of HR (position title) for Bibb County Schools (company name).



Lewanna E. Stubbs
Notary Signature

Lewanna E. Stubbs
Name of Notary (Typed, Printed, or Stamped)

Personally Known ☒ OR Produced Identification ☐ Type of Identification _____

District-Wide Classification and Compensation Study

Proposer's Reference Form
Reference #1

Proposer Name: Knox County Schools, Tennessee

Reference Company Name: Evergreen Solutions, LLC

Address: 1000 North Central Street, Knoxville, Tennessee 37917

Primary Contact Person: Scott Bolton Alternate Contact Person: _____

Primary Contact Title: HR Operations Executive Directors Alternate Contact Title: _____

Primary Contact Phone: (865) 594-1800 Alternate Contact Phone: _____

Primary Contact Email: Scott.Bolton@knoxschools.org Alternate Contact Email: _____

Contract Performance Period: 4/1/2023 - 3/30/2024 Location of Services: Knoxville, TN

Brief description of the services performed for this reference:

Evergreen Solutions was retained by Knox County Schools to provide Classification and Compensation Consultant Services. Evergreen will conduct an analysis of current conditions, review classification structure and identify areas of concern, and determine market ranges for compensation across job families. Comparisons for determining the market ranges are not limited to only public schools but also include private and public entities. An evaluation of current salary schedules and procedures, including but not limited to contract lengths and movement between scales, will be conducted as well as an assessment of the District's total compensation package, including benefits and costs passed on to the employee, annual leave, and paid and unpaid holidays. The original contract was amended to include classification study; anticipated completion of project is Spring 2024.

Overall contract performance: O Poor O Fair O Adequate O Good ☒ Excellent

Would you contract with this vendor again? Yes ☒ No _____

HR 1/10/2024

Primary Reference Contact Signature

Date

The foregoing instrument was acknowledged before me by means of ☒ physical presence or ☐ online notarization

this 10 day of January, 2024, by Scott Bolton (name of authorized representative) as

Executive Director (position title) for Knox County Schools (company name)

Karen E. McCormack
Notary Signature

Karen E. McCormack
Name of Notary (Typed, Printed, or Stamped)

(NOTARY SEAL)



Personally Known ☒ OR Produced Identification ☐ Type of Identification _____

District-Wide Classification and Compensation Study

Proposer's Reference Form

Reference #1

Proposer Name: School Board of Sarasota County, FL

Reference Company Name: Evergreen Solutions, LLC

Address: 1960 Landings Boulevard, Sarasota, Florida 34241

Primary Contact Person: Dr. Allison S. Foster Alternate Contact Person: _____

Primary Contact Title: Executive Director, HR Alternate Contact Title: _____

Primary Contact Phone: (941) 927-9000 ext. 31227 Alternate Contact Phone: _____

Primary Contact Email: Allison.Foster@sarasotacounty schools.net

Alternate Contact Email: _____ Contract Performance Period: 9/23/2022 – 10/30/23

Location of Services: Sarasota County, FL

Brief description of the services performed for this reference:

Evergreen conducted a District-wide Compensation and Staffing Study. This involved an analysis of the current salary structure, employee placement, and identified any areas of concern or compression within the system. An external market survey was conducted to provide an external assessment summary and an understanding of market competitiveness. A staffing analysis was also conducted to provide a comparison of staffing levels across multiple departments/areas.

Overall contract performance: ☐ Poor ☐ Fair ☐ Adequate ☐ Good ☒ Excellent

Would you contract with this vendor again? Yes ☒ No ☐

Primary Reference Contact Signature

Date

1/10/2024

The foregoing instrument was acknowledged before me by means of ☒ physical presence or ☐ online notarization this 10 day of January, 2024, by Allison Foster (name of authorized representative) as _____ (position title) for _____ (company name).

Notary Signature

Name of Notary (Typed, Printed, or Stamped)



Person Identified ☒ OR Produced Identification ☐ Type of Identification _____

Attachment VI
Local Preference Affidavit

To qualify for the Local Vendor Preference, a Proposer must have a physical location in Leon County (or an Adjacent County), employ at least one (1) person at that location, and have been licensed, as required, for at least six (6) months before the Proposal Opening. The Proposer, on a day-to-day basis, should provide the goods/services provided under this Contract substantially from the local business address. Post Office boxes are not acceptable for purposes of obtaining this preference.

By completing this Affidavit, the Proposer affirms that it is a Local or Adjacent County Business, as defined by Board Policy 6450.

Please complete the following in support of the self-certification:

Proposer Name: Evergreen
Physical Address: 2528 Barrington Cir, Unit 201, Tallahassee, FL 32308
County: Leon
Phone of Local Location: 850.383.0111
Length of Time at this Location: 1 year # of Employees at this Location: 18
Is your business certified as a small business enterprise through Leon County Schools? ☒

STATE OF FLORIDA
COUNTY OF Leon

Dr. Jeff Long
Authorized Representative (Print)

[Signature]
Authorized Representative (Signature)

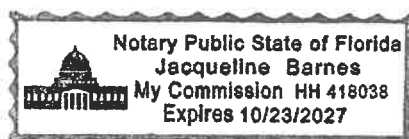
The foregoing instrument was acknowledged before me by means of ☒ physical presence or ☐ online notarization this 8th day of Jan, 2024 by Dr. Jeff Long (name of authorized representative) as President (position title) for Evergreen Solutions (company name).

Jacqueline Barnes
Notary Signature

(NOTARY SEAL)

Jacqueline Barnes
Name of Notary (Typed, Printed, or Stamped)

Personally Known ☒ OR Produced Identification ☐ Type of Identification _____



District-Wide Classification and Compensation Study

Attachment VII
Subcontracting Form

The Proposer shall complete the information below on all subcontractors that will be providing services to the Proposer to meet the requirements of the Contract, should the Proposer be awarded. Submission of this form does not indicate the District's approval of such subcontractor(s), but provides the District with information on proposed subcontractors for review.

Complete a separate sheet for each subcontractor.

Prime Proposer Name: Evergreen Solutions LLC

Type/Description of Goods or Service Subcontractor will provide:

Classification & Compensation Study Services

Subcontractor Company Name: N/A FEIN: _____

Contact Person: _____ Contact Phone Number: _____

Address: _____

Email address: _____

Currently Registered as a Small Business with Leon County Schools? Yes _____ No _____

Local Proposer per PO6450? Yes _____ No _____

In a job description format, identify the responsibilities and duties of the subcontractor based on the specifications or scope of services outlined in this solicitation.

Evergreen will not be utilizing any subcontractors

District-Wide Classification and Compensation Study

Attachment VIII
Drug-Free Workplace Certification

The undersigned Proposer, in accordance with Section 287.087, F.S. hereby certifies that

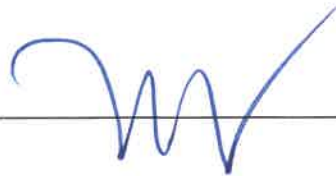
Evergreen Solutions, LLC
Company Name

does:

1. Publish a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance is prohibited in the workplace and specifying the actions that will be taken against employees for violations of such prohibition.
2. Inform employees about the dangers of drug abuse in the workplace, the business's policy of maintaining a drug-free workplace, any available drug counselling, rehabilitation, employee assistance programs and the penalties that may be imposed upon employees for drug abuse violations.
3. Give each employee engaged in providing the commodities or contractual services that are under proposal a copy of the statement specified in Paragraph 1.
4. In the statement specified in Paragraph 1, notify the employees that, as a condition of working on the commodities or contractual services that are under proposal, the employee will abide by the terms of the statement and will notify the employer of any conviction of, or plea of guilty or nolo contendere to, any violation of Chapter 893 or of any controlled substance law of the United States or any state, for a violation occurring in the workplace no later than five (5) days after such conviction.
5. Impose a sanction on, or require the satisfactory participation in a drug abuse assistance or rehabilitation program if such is available in the employee's community by any employee who is so convicted.
6. Make a good faith effort to continue to maintain a drug-free workplace through the implementation of Paragraphs 1 thru 5.

As the person authorized to sign this statement, I certify that this Contractor complies fully with the above requirements.

Signature of Authorized Officer



Date

1/8/2024

Certification Regarding Debarment, Suspension, Ineligibility and Voluntary Exclusion AD-1048
Attachment IX
RFP 241-2024
District-Wide Classification and Compensation Study

Attachment IX

Certification Regarding Debarment, Suspension, Ineligibility and Voluntary Exclusion

AD-1048

Lower Tier Covered Transactions

The following statement is made in accordance with the Privacy Act of 1974 (5 U.S.C. § 552a, as amended). This certification is required by the regulations implementing Executive Order 12549, Debarment and Suspension, and 2 C.F.R. §§ 180.300, 180.335, Participants' responsibilities. The regulations were amended and published on August 31, 2005, in 70 Fed. Reg. 51865-51880. Copies of the regulations may be obtained by contacting the Department of Agriculture agency offering the proposed covered transaction.

According to the Paperwork Reduction Act of 1995 an agency may not conduct or sponsor, and a person is not required to

(Read instructions on page two before completing certification.)

- A. The prospective lower tier participant certifies, by submission of this proposal, that neither it nor its principals is presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any Federal department or agency;
- B. Where the prospective lower tier participant is unable to certify to any of the statements in this certification, such prospective participant shall attach an explanation to this proposal.

ORGANIZATION NAME

PR/AWARD NUMBER OR PROJECT NAME

Evergreen Solutions, LLC

District-Wide Class & Compensation Study

NAME(S) AND TITLE(S) OF AUTHORIZED REPRESENTATIVE(S)

Dr. Jeff Long

SIGNATURE(S)

DATE

1/8/2024

In accordance with Federal civil rights law and U.S. Department of Agriculture (USDA) civil rights regulations and policies, the USDA, its agencies, offices, and employees, and institutions participating in or administering USDA programs are prohibited from discriminating based on race, color, national origin, religion, sex, gender identity (including gender expression), sexual orientation, disability, age, marital status, family/parental status, income derived from a public assistance program, political beliefs, or reprisal or retaliation for prior civil rights activity, in any program or activity conducted or funded by USDA (not all bases apply to all programs). Remedies and complaint filing deadlines vary by program or incident.

Persons with disabilities who require alternative means of communication for program information (e.g., Braille, large print, audiotape, American Sign Language, etc.) should contact the responsible agency or USDA's TARGET Center at (202) 720-2600 (voice and TTY) or contact USDA through the Federal Relay Service at (800) 877-8339. Additionally, program information may be made available in languages other than English.

To file a program discrimination complaint, complete the USDA Program Discrimination Complaint Form, AD-3027, found online at [How to File a Program Discrimination Complaint \(https://www.ascr.usda.gov/filing-program-discrimination-complaint-usda-customer\)](https://www.ascr.usda.gov/filing-program-discrimination-complaint-usda-customer) and at any USDA office or write a letter addressed to USDA and provide in the letter all of the information requested in the form. To request a copy of the complaint form, call (866) 632-9992. Submit your completed form or letter to USDA by: (1) mail: U.S. Department of Agriculture, Office of the Assistant Secretary for Civil Rights, 1400 Independence Avenue, SW, Washington, D.C. 20250-9410; (2) fax: (202) 690-7442.

District-Wide Classification and Compensation Study

Attachment X

CERTIFICATION REGARDING LOBBYING

CERTIFICATION FOR CONTRACTS, GRANTS, AND COOPERATIVE AGREEMENTS

The undersigned certifies, to the best of his or her knowledge and belief, that:

1. No Federal appropriated-funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of congress, or an employee of a member of congress in connection with the awarding of any Federal contract, the making of any Federal grant, the making of any Federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any Federal contract, grant, loan, or cooperative agreement.
2. If any funds other than Federal-appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a member of congress, an officer or employee of congress, or an employee of a member of congress in connection with this Federal contract, grant, loan, or cooperative agreement, the undersigned shall complete and submit Standard Form-LLL, Disclosure Form to Report Lobbying, in accordance with its instructions.
3. The undersigned shall require that the language of this certification be included in the award documents for all sub-awards at all tiers (including sub-contracts, subgrants, and contracts under grants, loans and cooperative agreements) and that all sub-recipients shall certify and disclose accordingly.

This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering into this transaction imposed by Section 1352, title 31, U.S. Code. Any person who fails to file the required certification shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

By  _____

Date: 1/8/2024

(Signature of Official (Executive Director) Authorized to Sign Application)

By _____

Date: _____

(Signature of Official (Chief Financial Officer) Authorized to Sign Application)

For _____

Name of Grantee

Title of Grant Program

District-Wide Classification and Compensation Study

Disclosure of Lobbying Activities

Complete this form to disclose lobbying activities pursuant to 31 U.S.C. 1352

N/A

1. Type of Federal Action: a. contract ____ b. grant c. cooperative agreement d. loan e. loan guarantee f. loan insurance	2. Status of Federal Action: a. bid/offer/application ____ b. initial award c. post-award	3. Report Type: a. initial filing ____ b. material change For material change only: Year ____ quarter ____ Date of last report ____
4. Name and Address of Reporting Entity: ✓ ____ Prime ____ Subawardee Tier ____, if Known: Congressional District, if known:		5. If Reporting Entity in No. 4 is Subawardee, Enter Name and Address of Prime: Congressional District, if known:
6. Federal Department/Agency:	7. Federal Program Name/Description: CFDA Number, if applicable: _____	
8. Federal Action Number, if known:	9. Award Amount, if known: \$	
10. a. Name and Address of Lobbying Registrant <i>(if individual, last name, first name, MI):</i>	b. Individuals Performing Services (including address if different from No. 10a) <i>(last name, first name, MI):</i>	

Evergreen has no lobbyist or engages in lobbying

District-Wide Classification and Compensation Study

11. Information requested through this form is authorized by Title 31 U.S.C. Section 1352. This disclosure of lobbying activities is a material representation of fact upon which reliance was placed by the tier above when this transaction was made or entered into. This disclosure is required pursuant to 31 U.S.C. 1352. This information will be reported to the Congress semi-annually and will be available for public inspection. Any person who fails to file the required disclosure shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

Signature: _____

Print Name: _____

Title: _____

Telephone No.: _____

Date: _____

A Cost Proposal to Conduct a District-Wide Classification and Compensation Study for Leon County Schools, FL RFP #241-2024

ORIGINAL



Evergreen Solutions, LLC

January 11, 2024

Cost Proposal

Evergreen Solutions is pleased to present our proposed cost conduct a District-Wide Classification and Compensation Study for Leon County Schools. We are committed to providing the highest quality consulting services to our client partners for a reasonable price. Our company is fortunate that our overhead is minimal and our expenses are reasonable so we can pass that price savings on to our clients.

Our total, not-to-exceed, fixed cost to complete all tasks identified in our detailed work plan in **Section C.2** of our proposal is included on the attached **"Cost Proposal Form"**. Our cost 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 cost is based on a blended hourly rate of \$150 per hour for all staff assigned to this project.

Our preferred method of invoicing is as follows:

- 25% - upon completion of Tasks 1 – 2
- 25% - upon completion of Tasks 3 – 4
- 25% - upon completion of Tasks 5 – 6
- 15% - upon completion of Tasks 7 – 10
- 10% - upon completion of Task 11

We are willing to negotiate the time, scope, and cost of the basic tasks, or any other options that Leon County Schools wishes to identify. Evergreen Solutions federal employer identification number is 20-1833438.



Attachment I Cost Proposal Form

RFP No. 241-2024 District-Wide Classification and Compensation Study

Rates shall be inclusive of all expenses including travel, supplies, equipment, training, overhead and profit.

Description	
Not-to-exceed total price (inclusive of all costs associated to perform and complete requirements of Scope of Services)	\$ 50,500 ⁰⁰
Fee Schedule for Additional Services (Not considered in contract award)	
Position Title	Hourly Rate
Project Principal, Project Director &	\$ 150 ⁰⁰
Project Consultants	(Blended hourly rate)
	\$
	\$
	\$

Evergreen Solutions, LLC

Company Name

FEIN

20-1833438

Dr. Jeff Ling

Authorized Representative Name (Printed)

President

Authorized Representative Title

[Signature]

Authorized Representative Signature

1/8/2024

Date