

PROPOSAL

The City of San Luis Human Resources Department

Classification and Compensation Study

May 27, 2016

SUBMITTED BY:

VICKI QUINTERO BRASHEAR

Director of Products and Services

CPS HR Consulting
241 Lathrop Way
Sacramento, CA 95815
P: 916-471-3481
F: 916-561-7281
vicki@cpsshr.us
Tax ID: 68-0067209

www.cpsshr.us



Your Path to Performance

May 27, 2016

City of San Luis Human Resources Department
Omar Heredia, M.Ed.
1090 E. Union St.
P.O. Box 1170
San Luis, AZ 85349

Submitted via email to: OHeredia@cityofsanluis.org

Subject: Proposal for Classification and Compensation Study

Dear Mr. Heredia:

CPS HR Consulting (CPS HR) is pleased to submit this proposal to the City of San Luis Human Resources Department (City) to provide classification and compensation consulting services. With a rich history of assisting government agencies with their compensation needs, we at CPS HR are confident that we can provide expert solutions to meet the City's needs.

Reasons to select CPS HR include:

- ***In-depth of experience preparing classification and compensation studies.*** CPS HR has conducted more than 75 classification and compensation studies for cities, counties, courts, special districts and, higher education institutions within the last few years.
- ***A thorough understanding of all local government operations, programs, and services.*** CPS HR has been assisting public agencies meet their human resource needs for more than 30 years.
- ***Our commitment to maintaining open communications.*** Our project team will focus on maintaining open communication with the City's HR staff to ensure that every project preserves its focus and adheres to the timeline and budget.

Thank you for this opportunity; we very much look forward to working with the City of San Luis Human Resources Department. Should you have any questions, please do not hesitate to contact our proposed Project Manager, Bruce Davis, Ph.D. **You can reach Dr. Davis by email at bdavis@cpshr.us or by phone at (916) 471-3382.**

Sincerely,



Vicki Quintero Brashear
Director of Products and Services

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About CPS HR Consulting

CPS HR Consulting (CPS HR) is an innovative, client-centered human resources and management consulting firm specializing in solving the unique problems and challenges faced by government and non-profit agencies. As a self-supporting public agency, we understand the needs of public sector clients and have served as a trusted advisor to our clients for more than 25 years. The distinctive mission of CPS HR is to promote excellence in human resource management in the public sector.

With more than 80 full-time employees and 200+ project consultants and technical experts nationwide, CPS HR delivers breakthrough solutions that dramatically transform public sector organizations to positively impact the communities they serve. CPS HR is headquartered in Sacramento, California with satellite offices in Austin, Texas; Atlanta, Georgia; and Rockville Maryland.

CPS HR offers clients a comprehensive range of competitively priced services, all of which can be customized to meet your organization's specific needs. We are committed to supporting and developing strategic organizational leadership and human resource management in the public sector. We offer expertise in the areas of classification and compensation, organizational strategy, recruitment and selection, and training and development.

CPS HR occupies a unique position among its competitors in the field of government consulting; as a Joint Powers Authority, whose charter mandates that we serve only public sector clients, we actively serve all government sectors including Federal, State, Local, Special Districts and Non-Profit Organizations. This singular position provides CPS HR with a systemic and extensive understanding of how each government sector is inter-connected to each other and to their communities. That understanding, combined with our knowledge of public and private sector best practices, translates into meaningful and practical solutions for our clients' operational and business needs.



Project Team

Project Manager

We have selected Dr. Bruce Davis to serve as the Project Manager for this study because of the strong project management skills and depth of experience with studies of this nature that he possesses. He will serve as the main point of contact for the City's Internal Project manager, and will manage CPS HR's project team; provide oversight for project assignments and manage the timeline and budget for project assignments throughout the duration of the contract.

PROJECT MANAGER CONTACT INFORMATION	
Project Manager	Bruce Davis, Ph.D.
Address	241 Lathrop Way Sacramento, CA 95815
Telephone Number	(916) 471-3382
Email Address	bdavis@cpshr.us

Project Consultants

To assist Dr. Davis, CPS HR has assembled a uniquely qualified team of professionals to serve as project consultants for the City. Each of these team members has broad and deep experience in public sector classification and compensation systems and analysis, has the necessary capacity to work on this project, and will be available to attend any and all meetings as required which will allow for the completion of the project within the proposed time frame. In the unlikely event that a team member identified in this proposal needs to be replaced, we will require the same qualifications and seek approval from the City. Additional professional and technical staff may also be involved in the project, as needed, for administrative support, as we commit our entire organization to meeting the needs of the City.

Resumes for each team member are provided in Appendix A.

Methodology

CPS HR's Approach to Consulting

Our approach to consulting can be summarized in the following four statements:

- CPS HR believes that building a solid foundation for human resource management will best support an organization's efforts to achieve its mission and goals. We view the human resources function as a systems model that integrates success factors and best practices across the human resources span of control, while aligning with the external and internal factors that support its solid foundation. The use of this systems approach eliminates or mitigates the unintended consequences of making decisions which place human resources programs in silos, rather than on a continuum.
- CPS HR fully understands that classification and compensation studies require an iterative, collaborative, and flexible approach, rather than an approach based on imposing change, and our work plans are designed to be inclusionary and collaborative with all City stakeholders.
- Classification and compensation systems should be designed to serve as a foundation for an organization over many years, through both good and bad economic times. We believe our greatest strength is our ability to work with our clients to develop well thought out systems which will withstand changing operational and economic conditions.
- We view our clients as our business partners; our goal is to form strong and collaborative partnerships with our clients to assist them in achieving their missions. It is through such partnerships that CPS HR achieves our own mission of promoting excellence in human resources management in the public sector.

Project Management Approach

Project Management and Communication

CPS HR is convinced that the key ingredient to a successful consulting assignment is an effective combination of sound project management procedures, high-quality project team members, and good customer service. Effective project management is required to provide for the orchestration and timely flow of activities, an ongoing feedback and adjustment mechanism, and the judicious use of time. Our project management process includes three primary components.

- **Providing ongoing monitoring and control of project activities.** Unforeseen developments or changes in circumstances may warrant changes in emphasis, revisions

to the approach in certain areas, or other modifications of planned work activities. Active project management provides greater assurance that such redirection will occur when warranted by circumstances.

- **Ensuring the optimum management of the time available to complete the project.** Effective time management is a skill required of experienced professionals. Sound project management can optimize the overall effectiveness of the project team's efforts and provide a greater assurance of meeting milestones and budgets.
- **Providing for the continuous reinforcement of the project's objectives.** A major role of project management is to ensure that the consulting team consistently adheres to the proper perspective in facilitating the project.

CPS HR is dedicated to the commitment of its full complement of resources for the success of all projects. The team members working on this project will be readily accessible and are committed to meeting all deadlines and scheduled timeframes.

Respond in a Timely Manner

Beyond the communication capabilities and routine project management practices identified above, our project team also has the depth and breadth necessary to meet time requirements of projects. It is our policy to make the best possible use of working time both on- and off-site. Furthermore, as part of our practice, client calls and emails will be addressed no later than 24 hours upon receipt, if not earlier.

Meet and Exceed the City's Expectations

The vision and values of CPS HR as an organization and for all of its personnel is centered around two primary values.

- **Satisfy the Client.** We will exceed client expectations whenever possible. We commit to quality and will assure that clients feel they have received a valuable service or product for the fee paid.
- **Value Ethical Behavior.** We model and reinforce honest and ethical behavior in all business relationships, including interactions with the Board members, clients, CPS HR staff, and the general public.

Our goal, therefore, is to ensure that our Project Team will meet or exceed the City's expectations for all phases of the project, and we will work diligently with City staff to fully meet the objectives of the project. We intend to accomplish this through our combination of sound project management procedures, good customer service, and solid communication strategies.

Progress Reporting Procedures

When a project begins, one of our first activities is to ensure that we have an accurate estimate of the level of effort required of each professional. These estimates are used to monitor the progress of each consultant against the work plan and project schedule. On a weekly basis throughout the project, professional hours are collected, accumulated, and distributed against project tasks so we can compare actual with budgeted performance.

An additional element related to the area of project control is the role of the Project Manager in monitoring the field work. The Project Manager is continuously involved in the review of ongoing activities to ensure that cost, schedule, and quality objectives are met. The Project Manager maintains frequent communication with project team members to coordinate ongoing activities and exchange pertinent information.

Periodic progress reports are another element of our project management and control system. It is our practice to provide our clients with verbal and/or written progress reports based upon our project tracking.

Work Plan

Our Understanding of the Scope of Work

CPS HR understands that the City is looking to retain a professional human resources consulting firm to conduct a Classification and Total Compensation Study for one hundred and ninety three (193) incumbents in one hundred and seven (107) classification specifications.

Classification Study Work Plan

As a general concept for any classification study, including those limited to a few positions, ongoing management of a relatively simple, well-delineated, and valid classification plan is an important organizational goal. Through the use of such a plan, an organization should be able to identify and maintain consistent structural relationships, develop equitable compensation plans, and have substantial protection against inappropriate “out-of-class” complaints. When conducting a classification review, the overarching aspects of these important factors should be taken into consideration.

The classification work plan outlined in this section is intended to define all tasks within a comprehensive classification study, from employee orientation sessions to final reports as well as the types of deliverables associated with certain tasks. This work plan does not provide for an employee review/appeal process, however one can be built into the work plan should the City desire such a review.

Task 1 – Receive and Review Background Materials. Upon contract execution, CPS HR will request background information from the City in order to ensure our Project Manager is prepared for the initial project meeting. Typical items requested are the current classification plan and concepts, classification specifications, organization charts, personnel policies and procedures, and any other documentation relating to the study.

Task 2 – Develop Job Evaluation Tools. CPS HR will develop tools to ensure valid information is gathered, analyzed, and documented consistently. This activity includes finalizing an online Position Description Questionnaire (PDQ) for approval by the City, and distribution of the PDQ to study participants. Each PDQ is designed to capture specific information, and to be used in studies with multiple analytical goals such as position allocation and classification specification development/revisions. Other PDQ formats may be required for some positions. CPS will work with the client to identify when these customized versions will be needed.

Task 2 Deliverable: Customized PDQ

Task 3 – Initial Project Meeting. The CPS HR Project Manager and team will meet with the City’s Project Internal Project Manager and designated key stakeholders to initiate the project by confirming study goals, objectives, and methodologies. During this meeting, CPS HR and the City will also discuss and agree upon a communication plan for this study because open and consistent communication is a key element in project acceptance and success. To mitigate project costs, and/or should the City desire, this meeting may be held via conference call or video conference.

Task 4 – Conduct Orientation Sessions. The CPS HR Project Manager will draft an email to all employees included in the study and invite them to attend a study orientation session. The purpose of the orientation session is to:

- Communicate study goals, methodology, and processes
- Provide the PDQ and explain to employees how the document should be completed
- Explain the role of employees, supervisors, and managers in the study
- Respond to any and all employee questions regarding the study process

These tasks and processes are critical in gaining employee understanding, trust, and acceptance of the study. Where possible, we encourage human resources staff to attend the meeting(s) to familiarize themselves with employee questions and the responses to those questions. For single incumbent or small numbers of employees, these sessions may be held via conference call or video conference. Union participation is also encouraged at this point of the study.

Task 5 – PDQ Completion. All employees included in the study will be asked to complete a PDQ providing detail on the current duties, responsibilities, qualifications, typical working conditions, and physical requirements of their position. To maintain the integrity of the classification process, a common best practice is for the study employees’ supervisors and/or managers to review and sign the PDQ to affirm that all pertinent information is captured. Further, while supervisors and/or managers are expected to provide input/comments on any inaccurate information provided by the employee by so stating within the relevant section of the PDQ, they are not expected to change the PDQ content prepared by the employee. Should there be differences of opinion between the employee and his/her supervisor/manager on job-related duties and responsibilities, these are reviewed and addressed by the consultant during the interview process in Task 7. To ensure a comprehensive review by all parties, the timeline for this process is four (4) weeks.

Task 6 – Receive and Review PDQ’s/Prepare for Job Evaluation Interviews. The CPS HR Project Team will thoroughly review each PDQ to obtain an understanding of the duties and responsibilities assigned to each position. Job evaluation interview questions for study employees will be developed based upon the results of the documentation review. CPS HR

project team members will develop an interview schedule and will coordinate the schedule with the City's designated staff member (this individual will assume responsibility for coordinating the interview schedule with CPS HR and the study employees, notifying employees of their allotted time and date, making changes to the schedule, notifying all parties concerned, and reserving any conference rooms).

Task 7 – Conduct Job Evaluation Interviews. In addition to the PDQ's, job evaluation interviews will be conducted with a representative sampling of study employees to ensure the CPS HR Project Team has a complete understanding of the duties and responsibilities assigned to each position. CPS HR's budget assumes that job evaluation interviews will be conducted a sample of up to 20% of the 193 employees. Interviews with supervisors/managers may also take place to further clarify information documented on their subordinate employees' PDQ's. For planning purposes, each individual interview is approximately 30 minutes in length and supervisor/manager interviews range from 45 minutes to one hour. To mitigate project costs, the job evaluation interviews may be held via conference call or video conference.

Task 8 – Analyze Classification Data/Prepare and Present Draft Classification Report. The Project Team will analyze all information collected from the incumbents and his/her supervisor/manager, and any comparator interviews to identify the job level; scope; typical duties; requisite knowledge, skills, abilities; and other job-related characteristics. This analysis will be used to make recommendations on how the study position(s) should be allocated within the City's classification structure; however, there are sometimes instances where there is no current classification to which a position can be assigned. In that case, after consultation with the City's Internal Project Manager, CPS HR may recommend the introduction of a new classification. The Project Team will revise/develop any current or the new classification specifications in a manner aligned with the City's format to ensure consistency in standards; we anticipate the classification specification would encompass the following sections:

- a) General statement of duties
- b) Statement of supervision received and exercised
- c) Essential function statements
- d) Knowledge, skills and abilities statements
- e) Minimum qualification statements
- f) Required special training, licensure, or certifications
- g) Physical requirements
- h) Working environment or conditions
- i) Exempt/non-exempt designation

The Project Team will then prepare a Draft Classification Report which will include the methodology, findings, allocation recommendations and any new or revised classification specifications. To mitigate project costs, a review of these findings can be conducted via a conference call if needed.

Task 8 Deliverable: Draft Classification Report and Classification Specifications

Task 9 – Prepare and Present Final Classification Report and Classification Specifications.

Once the City has reviewed the draft documents and provided feedback, an original, an electronic copy in Word format, and the requested number of copies of the Final Classification Report and classification specifications will be submitted to the City’s Internal Project Manager. If requested, the CPS HR Project Manager will present the study results to identified stakeholders.

Task 9 Deliverable: Final Classification Report and Classification Specifications

Total Compensation Study Work Plan

The general purpose of this compensation study is to identify pay and benefit trends for specific jobs within the market, and to determine how the City's salaries are aligned within the market. In this study, the role of CPS HR is to conduct the necessary research and market analyses which are aligned with best practices, and to then provide sound and defensible recommendations to the City on pay levels for jobs.

The compensation work plan outlined in this section is intended to define all tasks within a total compensation survey, from labor market selection to final reports, and the types of deliverables associated with certain tasks. Should the City already have an established labor market and identified benchmark classifications, Task 2 will not be necessary.

Task 1 – Receive and Review Background Materials. Upon contract execution, CPS HR will request background information from the City in order to ensure the Project Manager is prepared for the initial meeting. Typical material requests for compensation studies include salary schedules, benefits summaries, compensation policies and procedures, classification specifications, and any other documents relevant to the study.

Task 2 – Initial Project Meeting/Labor Market Agency and Benchmark Selection. The CPS HR Project Manager will meet with the City's Internal Project Manager and any identified stakeholders to discuss the study methodologies, deliverables, timelines, communication plan, and data collection methods. The budget prepared for this market study assumes that a maximum of 25 classifications will be surveyed within an identified labor market of no more than ten (10) agencies. During this same on-site visit, the CPS HR Project Manager will conduct a workshop with these key stakeholders to discuss the following elements of compensation policy:

- **Labor Market Agency Selection** - This section of the workshop focuses on the typical labor market selection criteria and the process by which CPS HR will evaluate and prepare recommendations for the City's labor market agencies; such selection criteria typically includes:
 - Geographic Proximity
 - Size of the organization (measures may include number of employees or population)
 - Services provided
 - Past labor market agency practices
 - Cost of living/cost of wages
- Additional workshop topics include:
 - Use of private sector data
 - Labor market position (i.e., median, mean, or other percentile)
 - Benchmark classifications to be selected based on the following criteria:

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- They should be classifications for which counterparts can readily be found in surveyed employers so that sufficient compensation data can be gathered. Classifications that have a large number of comparable information from other agencies are generally selected as benchmark classifications.
- Benchmark classifications should have significant relationships to other classifications in their occupational group. This ensures that they will make good reference points in relating and establishing salaries for other classifications within their occupational groups.
- Elements of total compensation to be surveyed

Using the selection criteria, the CPS HR Project Team will conduct research on potential labor market agencies and will provide the City with a memorandum detailing the recommended agencies and benchmark classifications to be used in the study.

Task 2 Deliverable: Draft Labor Market Agency and Recommended Benchmark Survey Classifications

Task 3 – Design, Develop, and Distribute Survey Instrument. The CPS HR Project Team will develop a comprehensive survey instrument to ensure the effective collection of salary information from each of the survey agencies. The survey instrument will include a brief description of each of the survey classifications with a request for the minimum and maximum monthly salary for each. CPS HR’s survey instrument is designed to be completed electronically or, if need be, via hard copy. For a total compensation study, the following elements of total compensation and the benefits practices outlined below are often collected:

- Cash add-ons premium pays such as:
 - Longevity pay
 - Deferred compensation
- Agency contribution to medical, dental and vision programs
- Agency contributions to defined-benefit retirement programs and Social Security practices
- Paid time off practices such as:
 - Holiday leave
 - Vacation and sick leave
 - Administrative leave

Task 3 Deliverable: Survey Instrument

Task 4 – Review, Analyze, and Validate Labor Market Survey Data. To ensure the City receives the most accurate data for this study, CPS HR will not solely rely on the completed surveys received from the labor market agencies without checking the validity of each submission. Thus, in conjunction with the survey instrument received from each labor market agency, the Project Team will review any additional survey agency background materials such as copies of classification specifications, organization charts, staffing information, and other useful materials to substantiate the accuracy of the comparability of the matches. It is critical that the Project Team review such documents because titles alone can often be misleading and should not be relied upon. Further, CPS HR is committed to attaining full participation from the labor market agencies, either through obtaining each agency’s agreement to complete the survey, and/or by the Project Team’s completion of surveys as needed. Once the Project Team has completed their survey analysis tasks, the Project Manager will audit the final data as part of the quality review process.

In order to determine whether a match from a labor market agency is comparable to the City’s benchmark, CPS HR utilizes a whole job analysis methodology; this commonly used methodology analyzes the job as a whole, rather than by individual factors, by evaluating the core duties and responsibilities, the nature and level of work performed, and the minimum qualifications to determine whether the classification is comparable enough to be utilized as a match. The methodology recognizes slight differences in duties assigned to matches from other labor market agencies which do not impact the type, nature, and level of work performed. Matches should not be so broad that they include classifications performing dissimilar work, or work done at a higher or lower level but they also should not be so narrow that they exclude matches doing comparable work, with slight differences in work that do not change the level and nature of work.

Task 5 – Design and Develop Data Spreadsheets. CPS HR will develop an individual data sheet for each survey classification that presents the comparable classification used in each agency with the relevant data associated with that classification, such as the salary range minimum and maximum. The labor market data analyses will be conducted based upon the labor market position affirmed within the City’s compensation philosophy (e.g., median, mean, or other percentile). Each comparable match for each survey classification is reported in the relevant data sheet. We find this level of transparency in matching provides for a better understanding and acceptance of study results.

Task 6 – Conduct Benefits Analysis. The benefits data submitted from the labor market agencies will be incorporated into the base salary data sheets to provide a total compensation analysis. This quantitative analysis of program costs will provide the City with an understanding of how the study classes compare against their market when the costs of benefits programs are taken into consideration. Within these data sheets, four different analyses can be conducted based on how the City wishes to view the data:

- An analysis of where the survey classification falls within the labor market for base salary
- An analysis of where the survey classification falls within the labor market when the cost of cash add-ons is taken into consideration (total cash)
- An analysis of where the survey classification falls within the labor market when the cost of cash add-ons and health programs are taken into consideration
- An analysis of where the survey classification falls within the labor market when the cost of cash add-ons, health program costs, and retirement contributions are taken into consideration (total compensation)

Additional/alternate analyses can be conducted based upon the City's needs.

Tasks 5 and 6 Deliverable: Individual Data Sheets for Each Survey Classification

Task 7 – Conduct Internal Equity Analysis/Prepare Draft Salary Recommendations. A comprehensive and balanced pay program is the result of the analysis of external labor market data, combined with an analysis of important internal relationships that reflect the City's value system of jobs. With the whole job methodology, the internal pay relationship analysis for non-benchmark classifications will involve a number of steps in order to arrive at sound and equitable relationships. Among others, the most important of these will include:

- Analysis of existing and historical pay relationships
- Development of consistent, uniform, and realistic guidelines for determining internal relationships including span of control, nature, level of work performed, and related components
- Recommendation of equitable and appropriate internal relationship differentials based on the above

CPS HR utilizes a five step methodology for establishing salary levels for benchmark and non-benchmark classifications in our compensation studies. This methodology would be applied to all City study classifications within the pay plan.

1. The first step is to conduct a comprehensive review of the survey results to identify benchmark classifications to be used in the salary setting process.
2. The second step is to establish salary recommendations for these benchmark classifications by setting the salary level based on the market data.
3. The third step is to conduct a comprehensive review of the City's current internal alignment differentials to determine what their practices are, and if they should be adjusted.

4. The fourth step is to apply recommended internal differentials within job families to build the salary recommendations for classifications which have significant relationships to each other because they are in the same job series or family.
5. The fifth step is to determine what classifications remain that are not benchmark classifications and are also not part of a job series or family. These classifications are then reviewed to determine which classification(s) is the subject classification currently internally aligned with and whether that relationship should be changed. Evaluation factors include the nature, level of work performed, as well as the minimum qualifications.

Additionally, the salary recommendations for each study classification will display the following information:

- Classification title
- Current monthly range maximum
- Recommended monthly range maximum
- The percentage difference and/or dollar amount difference between the current and recommended monthly range maximum

This information will provide the City with the percentage and dollar amount of any increase on a classification-by-classification basis.

Task 7 Deliverable: Draft Salary Recommendations

Task 8 – Prepare Draft Total Compensation Report. The Project Team will develop a Draft Total Compensation Report detailing the results of the labor market survey. This draft report will comprise the following:

- Scope of the study
- Labor market agencies, including the methodology utilized to identify the recommended agencies
- Study benchmarks, including the methodology utilized to identify benchmarks
- Labor market data analysis/methodologies
- Results of the base salary survey
- Results of the benefits analyses
- Results of the total compensation analysis
- Salary recommendations for all classifications

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The CPS HR Project Manager will meet with the City's Internal Project Manager and key stakeholders to discuss the Draft Total Compensation Report and to respond to any questions, comments, and/or concerns.

Task 8 Deliverable: Draft Total Compensation Report

Task 9 –Prepare and Present Final Total Compensation Report. Based upon the City's review of the Draft Total Compensation Report, the Project Team will follow up and resolve any outstanding issues. Hard and electronic copies of the Final Total Compensation Report will be delivered to the City, and if requested, the CPS HR Project Manager will present the study results to identified stakeholders.

Task 9 Deliverable: Final Total Compensation Report

Ongoing Technical Support

When the project is concluded, we continue to work for you. Should you have any questions or concerns on issues that arose during the course of the study or on study outcomes, *at no additional cost*, we make ourselves available to you via telephone and email to respond to any such questions for **one year** after the final report has been issued.

Working with the City

Successful completion of this project within the time specified depends largely upon an efficient working relationship between the City and CPS HR. For this reason, we request that the City designate an individual to coordinate project communications, meetings, and review of study deliverables. This City's Internal Project Manager will be responsible for the following activities:

- Working directly with the CPS HR Project Manager to ensure the study is conducted in accordance with the City's requirements.
- Arranging for coordination of all meeting schedules, conference calls, facilities, and equipment needs.
- Timely review of draft and final reports - any study deliverables developed during the activities described above will be submitted to the City's Internal Project Manager for distribution, review, comment and/or approval.

In terms of time commitment for City staff, it is our understanding that the City wishes to contract with a consultant firm to conduct the entire effort. The City should expect a minimal time commitment and to only be involved in the coordination of specific tasks listed in the work plan.

Project Timeline

Based upon the work plan presented within this proposal, we anticipate a study of this nature could be completed within the timeline established.

Our time frames are based upon the assumption that the selected labor market agencies will provide the information required within the specified time frame and that the City will be able to review, comment on, and approve study products within agreed upon time frames. During the study, the CPS HR's Project Manager will provide the City's Internal Project Manager with weekly status reports on project progress and will assess any impacts on the timeline.

Task #	Classification Study	Week #
Task 1	Receive and Review Background Materials	Upon contract execution
Task 2	Develop Job Evaluation Tools	1-2 weeks
Task 3	Initial Project Meeting	1-2 weeks
Task 4	Conduct Orientation Sessions	Week 3
Task 5	PDQ Completion	Week 7
Task 6	Receive and Review PDQ's/Prepare for Job Evaluation Interviews	Week 8 - 9
Task 7	Conduct Job Evaluation Interviews	Week 10 – 11
Task 9	Analyze Classification Data/Prepare and Present Draft Classification Report	Week 12-14
Task 10	Prepare and Present Final Classification Report and Classification Specifications	Week 14 – 16

Task #	Compensation Study	Week #
Task 1	Review the City's Background Materials	Upon contract execution
Task 2	Initial Project Meeting/Labor Market Agency and Benchmark Selection	Week 3
Task 3	Design, Develop and Distribute the Survey Instrument	Week 1 - 4
Task 4	Review, Analyze and Validate Labor Market Survey Data	Week 5 - 9
Task 5	Design and Develop Data Spreadsheets	Week 10

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Task #	Compensation Study	Week #
Task 6	Conduct Benefits Analysis	Week 5 - 9
Task 7	Conduct Internal Equity Analysis/ Prepare Draft Salary Recommendations	Week 10 - 12
Task 8	Prepare Draft Compensation Report	Week 12 - 14
Task 9	Research and Resolve Issues/Prepare and Present the Final Compensation Report to the City Council	Week 15 - 16

Fee Schedule

Professional Fixed Fee

The professional fixed fee to complete the City’s classification and compensation study as described in this proposal is **\$38,800**. Our professional fixed fee includes the following trips:

- Initial project meetings/compensation workshop.
- Present Draft Compensation Report.
- Present Final Compensation Report.

Reimbursable Expenses

Actual out-of-pocket expenses for such items as consultant travel, printing/copying, binding, and postage/delivery charges are reimbursable at cost. There is no mark-up on expenses. We estimate a total of **\$2,800** for expenses.

CPS HR will bill professional service fees and any incurred expenses as a direct pass-through on a monthly basis.

CPS HR is flexible with the proposed work plan; alternate approaches may be discussed with the City, which may in turn change the proposed cost of the project. As described in this proposal, the methods, approach, timelines, as well as the proposed fee, have been prepared as accurately as possible based upon the services requested and study objectives described in the information provided to CPS HR. If changes or additional services are required, we will be happy to discuss changes to the project tasks and/or schedule.

Rates for Additional Services

A rate schedule is presented for any additional work desired by the City that is not specified in the work plans prepared for this proposal.

Schedule of CPS HR Billing Rates	
Project Staffing Category	Hourly Rate
Project Manager	\$135
Project Consultant	\$120
Project Technician	\$60

Appendix A: Resumes

Jennifer Ramos, M.A.

Profile

Ms. Ramos is a seasoned principal human resources consultant who is a strategic, innovative, problem-solving, diplomatic leader. She led citywide class studies for over 500 classifications and over 2,000 employees. She has meet and conferred with unions over class study impacts (e.g., job spec revisions, new labor relations classes, title changes). She managed various large-scale, executive, and series exams in two merit system school districts.

Employment History

- Principal HR Consultant, CPS HR Consulting
- Principal HR Analyst, City of Pasadena-Department of Human Resources
- Classified HR Analyst, Montebello Unified School District-Personnel Commission
- HR Specialist III, Los Angeles Unified School District-Personnel Commission

Professional Experience

- Managed citywide class studies for over 500 classifications; meet with Department Directors to discuss position allocations and HR recommendations; implemented new classes, reclassifications, and title changes; draft policies for management review
- Interpreted, applied and explained contract provisions, memoranda of understanding, FLSA, and applicable laws/regulations such as Personnel Rules
- Diplomatically clarified class study procedures to management, employees, and union by creating flowcharts, handouts and reports; meet and conferred with unions over classification and compensation impacts to reach agreements
- Supervised all recruitment and selection activities; trained staff to conduct job analyses and competency modeling; delegated exams; composed job bulletins; administered tests and interview panels
- Conducted high level classification and compensation studies for purposes of departmental reorganizations; conducted desk and employment audits; wrote recommendations and memorandums to the PC and Board of Education

Professional Certifications/Leadership

- National Public Employer Labor Relations Association, Russo Scholarship Recipient November 2015, NPELRA Foundation
- Public Employer Labor Relations Association of California (PELRAC), Member since 2013
- Southern California Public Management Association - Human Resources (SCPMA-HR), Director of Communications 2012-2013. Re-elected to second term 2013-2014.

*Proposal to the City of San Luis Human Resources Department
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- Member since 2011 Personnel Testing Council of Southern California (PTC-SC), Member 2008-2011; Scholarship Committee 2010

Education

- Masters of Public Administration, California State University, Northridge, CA
- B.A., History and Business Administration, Berkeley, CA
- B.A., Italian Language and Art History, Florence, Italy

Justin Tucker, M.A.

Profile

Mr. Tucker is an HR Consultant with CPS HR Consulting. He has a Master's Degree in Industrial & Organizational Psychology with vast experience in surveys, job analysis, need analysis, statistical procedures, and program evaluation.

Employment History

- HR Consultant, CPS HR consulting
- Industrial Psychologist, FedEx Freight
- Assessment & Development Spct, Personnel Board of Jefferson County, AL
- Training & Development Intern, Biltmore Estates

Professional Experience

- Plan and utilize applied industrial psychology methodology (e.g., surveys, job analyses, need analyses, statistical procedures, and program evaluations)
- Assist with the design, development, and implementation of content valid performance management and selection procedures.
- Assist in the research, design and implementation of training/education in HR procedures including assessment, selection, and performance management.
- Perform statistical analyses and interpret data for a various human resource issues (e.g., employee survey results, AI analysis).
- Participate in or coordinate projects and/or Subject Matter Expert teams working to resolve specific human resources issues.
- Update policies, procedures, and intranet sites needed in the areas of assessment, selection, performance management, training, and testing.
- Conducted job analyses by gathering background information, meeting with subject matter experts, and collecting and analyzing data in order to define job domains (e.g., work behaviors, tasks, and KSAs).
- Developed legally defensible and content valid selection tools (e.g., structured interviews, work samples, minimum qualifications) based on job analyses.
- Assisted in yearly Classification and Compensation survey of jobs by conducting job analyses and desk audits to identify and document changes in work tasks, and to determine if employees are properly classified.

Education

- MA, Industrial and Organizational Psychology, Western Kentucky University, KY
- BA, Psychology, University of Alabama, AL

Joyce Douglas

Profile

Ms. Douglas is a Project Consultant with CPS HR Consulting with more than 27 years of Human Resources and over 20 years of management experience working in various industries. Ms. Douglas possesses Human Resources expertise in the areas of Compensation, Classification, HR Systems, Benefits, Training, Project Management, Change Management and Employee Communications. For example, as Director of Compensation, Benefits and HRIS at Semtech Corporation, Ms. Douglas led a large HR integration project completing the integration of HR policies and procedures, compensation, and Human Resource systems for a major global acquisition. As Director of Technical Human Resources Services for Rio Tinto Minerals, she led the design and implementation of a global classification project including both technical and non-technical jobs covering 17 countries and including customized compensation studies.

After gaining a broad base of human resources experience, Ms. Douglas became a project consultant for CPS HR Consulting. As a CPS Consultant, her specialties include compensation and classification.

Employment History

- Project Consultant, CPS HR Consulting
- Director, Compensation, Benefits and HRIS, Semtech Corporation
- Director, Human Resources Technical Services (Compensation and HRIS), Rio Tinto Minerals
- Human Resources Manager, U.S. Borax
- Executive Director, Human Resources, Cardinal Health, Nuclear Pharmacy Services
- Director, Human Resources, Cardinal Health, Nuclear Pharmacy Services

Professional Experience

- Ms. Douglas has led and managed the hands-on implementation of a global classification project that aligned jobs and enabled the organization to create greater equity of pay, employee development, manpower planning and benefits within the corporation. During the global classification project, she negotiated with managers and executives to resolve perceived misalignment of job levels and analyzed organizational and compensation impact of job placement decisions. Her results were presented to all levels of management and she collaborated with other company divisions and departments to ensure organizational consistency of outcome.

In addition, Ms. Douglas developed a job questionnaire for the collection of specific job data; developed and conducted job classification training for HR Managers/Professionals enabling them to assist with the job classification process; analyzed job data and identified opportunities to simplify and consolidate job titles; conducted ad-hoc job classifications for individual jobs or whole work groups during reorganizations and job consolidations. Ms. Douglas has developed job hierarchy

definitions and documents describing compensation programs such as incentive plan summary descriptions and salary administration manuals, to be used as employee and manager administration aids and communication tools.

- Ms. Douglas has been a Certified Compensation Professional for over 20 years. She has either managed or been a hands-on analyst for the completion of compensation studies/analysis for total compensation (base salary, variable, and long-term pay) enabling companies to motivate, reward, attract and retain talent. She has conducted studies using local market data representing a competitive benchmark for comparison, prepared her analysis findings identifying market trends, current placement within salary range/band, and possible strategies for implementation and presented to management for consideration and decision making/implementation.

She has overseen and had hands-on responsibility for annual human resources processes for merit increases, performance appraisal/assessment, bonus calculations, executive compensation review, and equity awards. She has developed pay structures, bonus/incentive plans, and other compensation programs while ensuring accuracy in process documentation, calculations, compliance and implementation. She analyzed performance trends and conducted cost to budget analysis as part of each process.

- During her career, Ms. Douglas has managed and/or worked as an analyst in all areas of Human Resources management except labor relations. In those roles she has established policies and procedures and worked collaboratively with management and executives to educate and ensure compliance. She has supported recruitment, employee benefits, and developed policies and procedures.

Ms. Douglas has had oversight of and managed employee communications during organizational change processes to ensure maximum employee retention and minimum operational disruption in addition to overseeing the budgetary implications of organizational change (severance, job changes, programs).

- Ms. Douglas has had management oversight and provided hands-on support for management/organizational reorganizations, acquisitions, divestitures, downsizing, integrations, and other organizational change processes to ensure compliance, fairness, and minimal organizational disruption.
- Ms. Douglas led a cross-functional team representing 10 separate business units within a large global organization that developed a Human Resources development program for college graduates. The program rotated graduates through different human resources jobs within a two-year period with assignments in three to four of the different business units located across the U.S. and abroad. The program was adopted by other functional groups within the business to build bench strength and create a talent pipeline to be ready and available as natural attrition occurred. The program was successful in helping to reduce critical talent shortages in technical jobs.
- Over her career, Ms. Douglas has designed and conducted customized training modules, specific to audience needs and application for human resources programs and processes

including compensation, classification, organizational development, new program roll-outs (benefits, policies and procedures) and human resources automated tools.

- Ms. Douglas has managed a wide range of projects over her 27-year career. Recent project management examples include the integration of all human resources policies and procedures, benefits, and HRIS data for a large acquisition; implementation of a new HRIS system time tracking and reporting module in Workday; the integration of policies and procedures including time off benefits for 10 separate business units in the US; the implementation of a global banding scheme covering over 400 jobs in 18 countries; the development of a new global compensation structure; the development of a college recruiting development program requiring collaboration and cooperation by 10 separate business units to implement and manage; the design, management, and execution of a week long leadership conference for 500 managers in the Bahamas.

Education

- Executive Master of Business Administration, Claremont Graduate University
- Bachelor of Science in Business Management, University of Phoenix

Professional Associations

- World at Work

Professional Certification and Awards

- Certified Compensation Professional

Susan Meibaum

Profile

Ms. Meibaum is a Project Consultant with CPS HR Consulting. She has over 20 years of compensation and classification experience. She has worked for medium and large US and global organizations as well as government agencies and a non-profit. She has extensive experience in designing merit, incentive and bonus programs; compensation market benchmarking, data analysis; and position classification. She is a seasoned project manager, who is able to manage complex projects with short and long timeframes (six to 12 months).

Ms. Meibaum advises clients on compensation options and best practice; and is able to provide training and guidance on implementation.

Employment History

- Project Consultant, CPS HR Consulting
- Compensation & Classification Consultant, City of Carlsbad
- Sr. Manager Global Compensation & Benefits, Gemological Institute of America (GIA)
- Compensation Manager, WilmerHale
- Compensation Consultant, Comair
- International Compensation & Benefits Consultant, Convergys
- Senior Compensation Analyst, American International Group (AIG)
- Senior Compensation Advisor, Hess Corporation
- European Compensation Analyst, Citibank

Professional Experience

- **Classification.** Job audits and reports for individual positions and city-wide classifications; using a position description questionnaire and interview with incumbents. Observation sessions and write-up with findings and recommendations. Review and updating of class specifications, including job titling and other best practices. Fair Labor Standards Act audits.
- **Compensation.** Design surveys and templates to gather and analyze compensation and benefits data, and other market intelligence. Base salary and total compensation competitive benchmarking; review, validate, and evaluate compensation and benefits data. Make compensation recommendations and highlight opportunities for change. Design and develop merit, incentive and bonus programs. Also, skilled at designing and developing salary range structures.

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Work with clients to develop and implement compensation policies and philosophies that tie back to the organizational and human resources goals and objectives. Can advise clients on compensation options and provide training and knowledge transfer.

- **Training and Development; Training Delivery.** Develop presentation materials and train clients in compensation and classification terminology and principals. Experienced at delivering training to human resource and/or senior management on the implementation of new compensation programs and policies.
- **Project Management.** A seasoned project manager, who is able to manage small project groups working on complex projects with long timeframes (six months to a year). Experience of developing project goals, scope, timelines, and deliverables.
- **Other.** Completed WorldatWork courses on Variable Pay (Incentives, Recognition, and Rewards), Regulatory Environments for Compensation Professionals, and Excel Dashboards (A How to for Compensation Professionals).

Education

- BSc in Business Administration, Bath University

Professional Associations

- WorldatWork

Professional Certification and Awards

- Institute of Personnel Management, Stage 2, South West London College