

SECTION 2.0

WORK PLAN



Section 2.0 – Project Approach/Methodology

We have read the RFP carefully and confirm we understand the nature of services requested.

Broadly, steps in the process include:

Step 1: Project Initiation and Data Requirements

Initial Meetings

Upon agreement to proceed, MAG's study team will meet with our City project manager and formulate the Task Completion List with input from our management partner; typically this is HR and the key departmental staff. MAG can also meet with other appropriate personnel to request background information, review the objectives of the study, and discuss concerns and issues. We discuss compensation history, study goals, and all related project scope issues of importance.

Step 2: Department Head Input

At the outset of the study MAG representatives and our HR partners will meet with Executive Leadership staff, and Department Heads to communicate goals and objectives. Supervisors will also be provided with an "Administrative Issues" form, which will guide them in providing feedback on problem areas or concerns and to identify positions in need of review.

Data Required

- Current Employee & Payroll Data
 - Organization Charts
 - Pay and Classification Plan
 - Salary Schedules
 - Personnel Policies
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We will discuss:

- An overview of the study goals and objectives, thereby ensuring staff are apprised of the City's intentions to maintain a competitive salary system;
- The study approach and critical aspects of the project so staff is made aware of and understands the project's important milestones and schedule, as well as their contribution to adhering to established timelines; and,



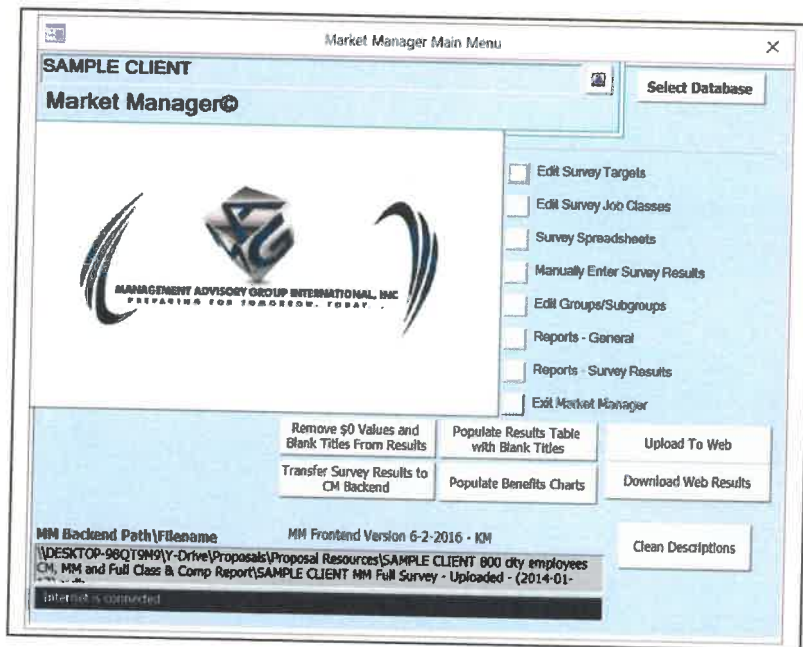
- An opportunity to ask general questions pertaining to the project so that concerns can be addressed at the outset of the study.

Step 3: External Market Review of Position Classifications

We cooperatively develop the market salary survey instrument, provide the survey instrument and target list to HR for review, comment, and suggestions, and contact target organizations to solicit survey participation. The survey instrument will be customized to meet your needs. MAG will work with our City partners to identify and fine tune both the survey targets as well as the list of represented benchmark positions for each of the occupational families.

Benchmarks are carefully chosen in concert with City staff.

MAG prefers to conduct salary surveys on-line via our custom internet survey, but alternative formats (hard copy, email & facsimile) are also available. For your study, MAG will use the identified sources of data and manage the input directly into our *Market Manager*® software program.



Survey Instrument Content

Each survey instrument is pre-populated with the following information for review by the target organization:

- Job class title.
- A succinct description of the job class.
- Required qualifications of the job class.

We will then enter the following survey data into *Market Manager*®:

- The respondents matching title and degree of match;
- Minimum, mid-point and maximum pay ranges;
- Any notes from MAG staff or respondents regarding differences between the City's and respondent's job class.

An Excel survey document is produced and provided to the target agencies for completion.

SAMPLE SALARY SURVEY

A Salary Survey for Valued Client

Respondent: Select Organizations
Address: Regional and National Locations
City: U.S. Cities
State:
Zip:

Contact: Select Representatives
Title: H.R. Officers
Phone:
Email: respondent@rvp.org

Job Class Title: Appraiser II - Commercial

Description	Qualifications
Obtains/reviews plans of large residential dwellings with construction angles. Measures and lists existing and new commercial structures. Provides with annual income and expense questionnaire mailing. Performs assessment/valuations on applicable properties using the income approach/methodology. Measures and classifies	Requires HS Diploma (or equivalent) and three years of technical experience and/or training (appraisals, surveying, real estate, etc.). Requires current Florida Drivers

Your Matching Title: Place Matching Title Here
Degree of Match: None Partial Full

Pay Frequency: Hourly Weekly Monthly Annually

Pay Range: Minimum: [] Mid Point: [] Maximum: []

Duty Days: [] Annual Hours: [] CFT Bonus: []

NOTES: Please describe any differences below.
Place Notes about Title Here

Save Changes [Submit] Reset Form [Reset]

Data is automatically saved when selecting a new title or when using the Next or Previous buttons.

Management Advisory Group, Inc. PHONE: (850)386-2711 EMAIL: info@maginc.org

Selected Benchmark Classifications

Brief Class Description & Qualifications

Enter Salary/Pay Information



At the close of the survey phase, we analyze the received survey response data and compile market study results for your review, evaluation, and comment. Once final results are calculated, we submit the completed market report and recommendations.

SAMPLE SURVEY RESULTS

Salary Survey Results												
Emergency Communications Officer												
Description: Employees in this class receive and transfer messages by telephone or two-way radio on an assigned rotating shift. Serves as a police telephone operator. Calls are received for general information, police personnel and police, or other emergency equipment and the incumbent provides the general information, transfers calls to police personnel and transfers calls for police emergency equipment to shift Sergeant. Calls are received by two-way radio from police vehicles for general information and obtained from teletype or other source and requested information transmitted. Operator records all information concerning calls and complaints. Does related work as needed.												
Quals: Experience and training in radio communications. Completion of a standard high school course; or any equivalent combination of experience and training which provides the required knowledge, skills and abilities. Radio operator's license prescribed by the Federal Communications Commission.												
Respondent	Mailing Title	Match	Min	Mid	Max	Range Width	Range	Entry	Avg Pay	Actual Pay	# of	Avg Yrs
Ormond Beach			\$17,932	\$22,432	\$28,061	\$6,514		<input type="checkbox"/>				
South Daytona	Dispatcher/Records Clerk		\$19,935	\$24,919	\$29,903	\$10,000		<input type="checkbox"/>				
Daytona Beach	Emergency Communications Officer I		\$20,217	\$26,018	\$31,819	\$11,602		<input type="checkbox"/>				
Port Orange	Dispatcher		\$20,385	\$25,920	\$31,455	\$11,065		<input type="checkbox"/>				
New Smyrna Beach	Emergency Communications Officer		\$20,700	\$25,572	\$30,444	\$9,744		<input type="checkbox"/>				
Deltona	Telecommunications		\$21,623	\$25,874	\$31,569	\$9,946		<input type="checkbox"/>				
Lake Mary	Identical	Identical	\$22,235	\$27,000	\$33,322	\$11,087		<input type="checkbox"/>				
Casselberry	Telecommunications I		\$22,405	\$27,467	\$32,528	\$10,123		<input type="checkbox"/>				
Longwood Key	Police Dispatcher		\$23,754	\$30,275	\$36,795	\$13,041		<input type="checkbox"/>				
Altamonte	Communications Technician		\$25,976	\$33,120	\$40,263	\$14,287		<input type="checkbox"/>				
Average			\$21,616	\$26,996	\$32,886	\$11,270						
Town of Ponce de Leon			\$16,996	\$19,832	\$23,667	\$6,671						
		\$ Difference	(\$5,520)	(\$7,163)	(\$9,219)	(\$26,215)						
		% Difference	-34.5%	-36.1%	-39.0%	-28.2%						

Benchmark Classification

Survey Respondent(s)

Results Comparison

Step 4: Job Questionnaires – Full Documentation in an Easy to Use Format

MAG has developed a highly efficient web based online job questionnaire process for employees and their supervisors. Supervisors access their employees' questionnaires for review and comment. Job questionnaires can be printed at any time following completion of the questionnaire.

This approach enables MAG to make distinctions at the employee level.

Additionally, all of the key information in the Job Analysis Questionnaires (JAQ's) are downloaded to MAG's *Classification Manager*® software so that the information is readily available for both use in identifying job profile values from the incumbents and their supervisors, as well as for future use by the City as a baseline or reference points to help calibrate job changes that might occur.



The use of the software is a technique to complement the highly personalized and substantial client input and discussions. But, the software achieves outcomes far beyond what can be achieved with Excel tables only.

CLASSIFICATION MANAGER - Job Class Editing and Evaluation

Classification Manager® - Proposed Job Class Evaluation
Large Client Sample

14 Administrative Assistant Populate Response

Job Title: Administrative Assistant Code: P0045
 Pay Plan: Unified Job Category: Office Support

Copy Points From: Original Classes And Issues Class Description Employee In This Class Avg 1AQ Responses

Degree of Involvement	Emp	Sup	Copy Emp Avgs to Proposed
Org Responsibility 3	3.82	4.00	Data Responsibility
Data Responsibility 4	3.66	3.67	People Responsibility
People Responsibility 4	2.06	2.11	Asset Responsibility
Assets Responsibility 2	5.48	5.49	Experience
Experience 5	3.45	3.39	Education
Education 2	2.16	2.18	Math
Math 2	3.63	3.61	Communications
Communications 4	2.62	2.54	Judgment
Judgment 3	4.06	3.93	Complexity of Work
Complexity of Work 4	3.18	3.53	Impact of Errors
Impact of Errors 4	1.95	1.95	Physical Demands
Physical Demands 2	1.82	1.79	Equipment Usage
Equipment Usage 2	2.12	0.00	Unavoidable Hazards
Unavoidable Hazards 1	1.50	1.80	Safety Of Others
Safety Of Others 2			
Total Points: 472			
Prop. Grade: 111			
Delta: 472 EAC: 0			
Min 37,786	Mid 45,343	Max 60,308	

Core evaluation profile values are based on ratings from employees and their supervisors.

Employees can see they had input into the evaluation profile values because it comes directly from their own input; thus validates and verifies the placement of the positions.

Your project will include the completion of job analysis questionnaires and use of the software to generate reports. ***You will see that MAG's online Job Questionnaire is comprehensive and easy to complete, and has been successfully completed by over 300,000 employees at all levels in local/state government agencies.***

MAG's Job Profile Method of Classifying work is comprehensive and unique approach to collecting and verifying accuracy of core job functions. Our proprietary software® is license for use, at NO COST, only to MAG's clients. The software is supported by MAG's comprehensive, step-by-step training manual.

Classification Manager® (CM) is a software tool designed by Management Advisory Group International, Inc. (MAG) to provide easy access to all of the information needed to equitably classify all job classes within an organization and can be used internally for a variety of compensation and classification purposes including running costing models for future years,.



MAG's proprietary quantitative job evaluation system is based on compensable factors. The system's flexibility will also fully accommodate a market rating approach to job classification as well as whole job ranking, making this the most flexible compensation and classification tool available to public sector entities today.

MAG's *Classification Manager*® (CM©) software can develop pay plans based on regression equation analysis of either the internal midpoint value of the original pay plan or market compensation and quantitative point-factor analysis. MAG often uses the original value of the organizations own jobs to establish the internal market control point, using external market values to adjust the proposed pay line.

In addition to point factor analysis, classifications should also be reviewed for economic anomalies within the marketplace. Economic anomalies are those positions for which market values are inflated or otherwise inconsistent due to shifting supply and demand conditions. As both private and public-sector organizations compete to attract and retain incumbents in such positions, market indicators fluctuate in high and low extremes that make it difficult to secure reliable market data.

MAG's *Job Analysis Questionnaire*© (JAQ©) is an online tool that fully integrates into the desk top utility, CM©, putting all of the most relevant job profile information at your fingertips. MAG's intuitive JAQ© walks employees through a simple step by step process to guide them in identifying the key factors in their work.

Employees identify their immediate supervisor. Supervisors are asked to review the questionnaires completed by employees, in an easy to follow online process. The data is easily checked and verified by the subject matter experts (employee and supervisor) through the questionnaire process. The data is provided to HR for ongoing purposes as well.



Step 5: Achieving Internal Equity

As a tool in supporting MAG's comprehensive and professional approach, we will utilize a Windows™ based system, ***Classification Manager***®, an evaluation system that integrates current market data and job analysis by professional evaluators.

When the City sees the efficiency and effectiveness of the software tool developed by MAG specifically to accomplish compensation projects and to support the goals and vision of our clients, you will see that there is no true comparison on the market by any of our competitors. The software will be licensed to HR at no additional cost for ongoing use to implement, update and maintain the system for many years.

It is critical, when handling employee salary information that reports not be based on a series of loosely linked Excel cells, where if one cell becomes corrupted, the entire file accuracy fails. A substantial number of our clients use our CM© program not only for classification and compensation schedules, but also for budget forecasting.

Step 6: Report of Study Conclusions and Implementation Options Prepared for You

Because *we tailor plans to the specific needs of each organization*, several cost analyses for implementing proposed study recommendations can be considered. The cost by employee to bring staff up to the proposed pay range minimums is the most conservative option and is always provided. Other options, such as length of time in classification, can also be used as criteria to assign employees to the proposed plan.

Our program generates analysis reports for each scenario under consideration for implementation.

Thus, you are provided with an in-depth budget review and forecasting tool to facilitate selection of the most viable and appropriate implementation strategy.

All implementation recommendations and other reports such as the above sample can be exported into multiple software formats, including Microsoft Excel, Microsoft Word, Microsoft Access and PDF formats. All other project related reports/documentation are provided in the client's in-use formats, e.g., Microsoft Word or Excel. These files are provided electronically and in hard copy.

Please consider that MAG views this project as one that requires extensive personal communications and interactions with City staff. That personal attention is supplemented by the best techniques in the industry to ensure accuracy.



Step 7: Salary Plan Administration, Maintenance, and Training

We will provide and install a licensed version of the *Classification Manager*[®] system. The system will contain the completed study data and pay plan, and HR staff will receive comprehensive training in the use, administration, and automated maintenance of the plan. The system includes comprehensive user-friendly documentation manuals with step-by-step procedures for the ongoing administration of the plan.

Staff Responsibilities

MAG, in all of its studies, expects to produce all products in a turnkey fashion, performing all necessary technical and professional work. Staff will be expected to assist MAG's team only in scheduling meetings, transferring data collected for the study, reviewing draft questionnaires, survey instruments, survey target lists, and reports, and providing input into philosophical issues pertaining to the development of a human resource classification and compensation system to meet your needs and preferences.

MAG will request a database of current payroll information for positions to be included in the study. *It is important that these data are supplied in the format required for use by MAG's analysts.* This data will be necessary to determine costs to implement the newly developed pay plan(s). All records and databases are kept strictly confidential, and are returned to or maintained upon project completion.

Project Work Plan

MAG has developed a proposed work-plan and project timeline in order to accomplish the scope of services described above.

PROJECT PHASES & WORKPLAN

Some of the proposed project activities and tasks indicated below will occur simultaneously. The amount of time needed for survey respondents to provide data is the most demanding dimension. We will work together with the City to ensure a timely and excellent project.



**Phase I: Project Initiation:
Day 1- Day 21**

Objective: To develop a project plan acceptable to all parties, gather pertinent project related data, finalize contractual negotiations, and establish a timeline for project activities and deliverables.

Activities:

- Execute Project Contract.
- Meet with our HR partners from the City and departmental staff to discuss the project's goals and objectives, and to coordinate on-site activities.
- Gather required project data/information, such as current class descriptions, current pay plan, administration policies and procedures, and organization charts.
- Initiate the employee information data collection in required database format in Excel.
- Establish a mutually agreed-upon project work plan, time lines, deliverables, and monitoring procedures that will lead to the successful accomplishment of all project objectives.

Deliverable(s):

- Finalized Project Work Plan through our unique Task Completion List process.
- Project Contract.



**Phase II: Development of Compensation Survey Instrument:
Day 14 – Day 30**

Objective: To develop a salary/compensation survey instrument to gather compensation data from survey targets, establish a list of classifications for inclusion in the survey, and define target respondent organizations/published surveys.

Activities:

- Work together with our HR/Project partners and top management to elect appropriate market survey target employers for selected positions that offer comparable employment opportunities.
- Develop draft market salary survey instrument to gather compensation data.
- Review Draft Survey with the Project Manager; revise as necessary and appropriate.
- Develop Final Salary Survey Instrument.
- Initiate survey via internet, telephone, published data, and e-mail for benchmarks.

Deliverable(s):

- Market Survey Targets and Classifications.
- Survey Instrument.



***Phase III: Conduct Custom Market Survey:
Day 30 – Day 60***

Objective: To administer a salary/compensation survey instrument to survey targets.

Activities:

- We work closely with you to identify specific target agencies to be included in the custom survey. We work with you to define the market.
- Provide survey options for participation, including online input through MAG's web site, completion of Excel format survey, and/or provision of current compensation plan.
- Review/clean collected compensation data and compare to current data.
- Develop market compensation summary by classification.
- Review compensation structure and develop recommendations.

Deliverable(s):

- Survey data for benchmark classes.
- Recommendations on compensation design.

***Phase IV: Conduct Job Analysis and Classification Reviews of all Classes
Day 45 – Day 75***

Objective: To conduct a review of included classifications for appropriate internal equity.

Activities:

- Conduct employee orientation meetings and distribute information on the ***Job Analysis Questionnaires***[®] (JAQ) and data gathering instrument. The JAQ is written in an understandable and easy-to-read format. Employees can list the job duties and responsibilities that they regularly perform and any recent changes in work routine.



- The questionnaire will capture job data for such factors as education levels, experience, decisions, guidelines, complexity, scope and effect, physical demands, and work environment.
- Monitor JAQ completion and provide updates on the status of employee questionnaire completion at key points.
- Provide Administrative Issues Forms to managers, supervisors, and key staff for their concerns regarding salary, and recruitment/retention issues. This will be a key component to the communications process, whereby key staff will be able to identify problems and clarify their own roles and responsibilities during the study process.
- Review the Administrative Issues forms completed by administrators, managers, and supervisors to identify comments concerning position levels.
- Conduct top interviews.
- Download and review completed JAQ's.
- Evaluate each job class according to key criteria.
- Make assignments and allocations for classes
- Develop pay structure.

Deliverable(s):

- Employee Orientation Sessions
- Questionnaire monitoring and updates.
- Department Head interviews.
- Classification data capturing and review.
- Recommended compensation structure.

***Phase V: Develop Recommendations to Classification Plan
Day 75 – Day 80***

Objective: To identify any needed changes to the classification plan.

Activities:

- Conduct analysis and evaluate the current classification plan(s) in terms of:
 1. supporting the overall goals and objectives;



2. its ability to provide compensation comparability between and among various groups and classes of positions;
 3. its ability to provide a meaningful salary level that recognizes credentials, certifications and experience;
 4. developing an initial set of recommended changes in the structure of the current classification system.
- Review recommended changes with the Project Manager and appropriate management staff and make appropriate revisions.
 - Develop revised pay plan(s).
 - Develop guidelines for maintaining the classification system.
 - Provide for internal review.

Deliverable(s):

- Revised Grade Order List and Pay Plan(s).
- Reclassification recommendations (if applicable).

***Phase VI: Submit Draft Project Report
Day 90 – Day 100***

Objective: To develop a draft report based on previous study activities and tasks.

Activities:

- Integrate project data and deliverables from previous project tasks into a draft report for internal review.
- Provide draft project findings to management for technical review.

Deliverable(s):

- Draft Report and initial findings to assist in budget calculations in July.



**Phase VII: Develop & Submit Final Project Report
Day 100 – Day 110/120**

Objective: To develop a final report of project results, findings and recommendations.

Activities:

- Revise draft report as necessary and appropriate based on technical review; develop and deliver final report.
- Present project findings and provide all study documentation (TBD).

Deliverable(s):

- Final Report.
- All Study Documentation.

**Phase VIII: Conduct Software Training & Technology Transfer
(Date to be Determined)**

Objective: To install the software system, and training for HR staff.

Activities:

- Provide for technology transfer of project related data and materials.
- Conduct software and plan training for selected HR personnel.

Deliverable(s):

- MAG's *Classification Manager*[®] software (licensed for use internally – at no cost to the City).
- *Classification Manager*[®] Training/User Manual.
- Training seminar for selected HR staff on *Classification Manager*[®] software, plan polices, and guidelines for maintenance.

