Evergreen Solutions, LLC

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Samantha Farist, CLRP
Director of Human Resources
City of Key West
3102 Flagler Avenue
Key West, Florida 33043

SUBMITTED VIA EMAIL: sfarist@keywestcity.com

Dear Ms. Farist:

We are very excited about the opportunity to again work with the City of Key West to conduct a Classification and Benefits Study. I have prepared a work plan outlining the tasks, activities, and milestones necessary to successfully conduct the study as well as our cost. Let me know if any changes need to be made to the work plan.

Detailed Work Plan

Task 1.0 Collect and Review Environmental Data	**TASK GOALS**
	• Conduct statistical and anecdotal research into the current environment within the City.
	• Guide subsequent analytical tasks.
	TASK ACTIVITIES
	1.1 Schedule and conduct employee orientation sessions.
	1.2 Meet with department heads to obtain relevant information and statistical/anecdotal data on specific compensation issues and policies. Obtain insight into perceived current compensation system strengths and weaknesses.
	1.3 Hold focus groups with a sample of employees to obtain additional relevant information and statistical/anecdotal data on specific compensation issues and policies.
	1.4 Work with the City's Project Manager (CPM) to administer the Job Assessment Tool (JAT) and the Management Issues Tool (MIT). 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 CPM before distribution of the JAT/MIT questionnaire.

1.5   Review any data provided by the City that may provide additional relevant insight.

1.6   Review internal career ladders and make recommendations to keep positions competitive.

KEY PROJECT MILESTONES

- JAT and MIT distribution

- Department head interviews

- Employee orientation sessions and focus groups

Task 2.0 Evaluate and Build Projected Classification Plan

TASK GOALS

- Identify the classification of existing positions utilizing Evergreen Solutions' job evaluation system (i.e., JAT).

- Review JAT responses.

- Characterize internal equity relationships within the City.

TASK ACTIVITIES

2.1   Review all draft class specifications with the CPM.

2.2   Review the work performed by each classification and score. Review includes evaluation of supervisory comments.

2.3   Review JAT scores and identify the classification of positions.

2.4   Schedule and conduct additional follow up with employees for jobs where uncertainty exists over data obtained from the JATs.

2.5   Develop preliminary recommendations for the classification structure. The classification system designed at this point would be based solely on internal equity relationships and would be guided by the JAT scores for each classification. Essentially, a structure of classifications would be established, and classifications with similar scoring would be grouped into pay grades. Spacing between jobs would be determined, and each classification would be assigned to a pay grade.

2.6   Review recommendations with the CPM.

KEY PROJECT MILESTONES

- JAT scores by class

- Recommended classification changes

- Preliminary job structure based on internal equity

Task 3.0 **Conduct Benefits** **Survey**	**TASK GOALS** • Conduct an external labor market benefits survey using the targets and benchmarks positions used to conduct the market salary survey. • Provide a summary of the survey results to the CPM for review. **TASK ACTIVITIES** 3.1 Develop a listing of the benefits provided by the City and review current vacation, sick leave, holiday, and leave policies as compared to competitive employers. 3.2 Using the list of City provided benefits and major benefits offerings not provided by the City to develop a list of benefits to include in the external labor market survey. 3.3 Develop benefits survey. 3.4 Conduct a survey of benefits in use by competitive employers, to include both private and public employers, and make recommendations regarding the benefits which the City might competitively employ in its market. 3.5 Submit benefits survey to CPM for review. 3.6 Revise benefits survey. 3.7 Distribute benefits survey in conjunction with salary survey. 3.8 Develop summary report of external labor market benefits results. 3.9 Submit summary report of external labor market benefits results to CPM. **KEY PROJECT MILESTONES** • Catalogue of existing City benefits • Benefits survey instrument • Summary report of external labor market benefits results
Task 4.0 **Develop and Submit** **Draft and Final** **Reports**	**TASK GOALS** • Develop and submit a draft and final report of the Classification and Benefits Study for the City of Key West. **TASK ACTIVITIES** 4.1 Produce a comprehensive draft report that captures the results of each previous step.

4.2 Submit the comprehensive draft report to the CPM for review.

4.3 Make edits and submit necessary copies of the final report which will describe the classification plan and will recommend implementation procedures as well as procedures for the continuing maintenance and administration of the plan.

4.5 Develop a plan for maintaining recommendations over time.

KEY PROJECT MILESTONES

- Draft and final reports

- Final presentation

- Implementation and maintenance database

Task 5.0
Provide Revised
Class Descriptions
and FLSA
Determinations

TASK GOALS

- Update existing class descriptions

- Create new class descriptions as needed, ensuring FLSA, EEO/ADA requirement satisfaction.

- Provide final version of all class descriptions/specifications in electronic format (i.e., MS Word) after approval by the CPM.

TASK ACTIVITIES

5.1 Assess current class descriptions for form, content, validity, and ADA compliance.

5.2 Discuss new class description format with the CPM.

5.3 Revise classification descriptions based on data gathered from the JAT process.

5.4 Create new class descriptions for new classifications, as needed. Provide complete listing of the allocation of job classes to salary range assignments.

5.5 Make FLSA determinations based on work performed and federal requirements.

KEY PROJECT MILESTONES

- Updated class descriptions

- New class descriptions as needed

Proposed Cost

Evergreen Solutions, LLC is pleased to present our proposed cost to conduct a Classification and Benefits Study for the City of Key West. Our total, not-to-exceed, fixed cost to complete all tasks identified in our detailed work plan is **$43,000.** This cost is all inclusive, and includes travel costs (meals and lodging), transportation, fringe benefits, indirect cost (overhead), clerical support, and all other out-of-pocket expenses. Our price includes two trips to the City of Key West.

We look forward to the opportunity to work with the City. If you need any additional information, please feel free to contact me at (850) 383-0111 or via email at jeff@consultevergreen.com.

Sincerely,

Dr. Jeffrey Ling
Executive Vice President
Evergreen Solutions, LLC