Agenda

Human Resources Committee
Jefferson County Courthouse
320 S Main St, Room 112
Jefferson, WI 53549

June 5, 2012 @ 8:00 a.m.

Committee Members: James Braughler, Greg David, Pamela Rogers, Jim Schroeder and Dick Schultz

1. Call to order
2. Roll call (establish a quorum)
3. Certification of compliance with the Open Meetings Law
4. Election of Chair, Vice Chair and Secretary positions
5. Review of the Agenda
6. Citizen comments
7. Approval of April 17, 2012 minutes
8. Communications
9. Convene into closed session pursuant to Wisconsin State Statues Section 19.85 (1)(e), discussion and consideration of contract competiveness and negotiations
   a. Review of proposals for a classification/compensation study and selection method
   b. Interviews with potential firms to conduct a classification/compensation study (30 minutes each)
      i. Carlson Dettmann Associates (8:30 am)
      ii. The Waters Consulting Group, Inc (9:00 am)
      iii. Public Sector Personnel Consultants (9:30 am)
   c. Discus negotiating strategy
10. Reconvene into open session for possible action regarding items discussed in closed session
11. Discussion, selection and recommendation of a final candidate to conduct a County-wide Classification and Compensation Study for Jefferson County (excluding represented law enforcement)
12. Review of the Human Resources 2011 Annual Report
13. Review of Retirement Recognitions for the second quarter, 2012
14. Request by County Administrator to reclassify the current WIC Project Nutritionist incumbent at the Health department (as recommended by Carlson Dettmann Associates), the current Systems Analyst incumbent in MIS to a Senior Systems Analyst, and the current Assistant Superintendent at the Highway Department to an Operations Superintendent, as well as postpone all other reclassification requests to be completed with the classification/compensation study, or if study is delayed or rejected, to complete the reclassification requests in the fall of 2012 to implement January 1, 2013.
15. Review and recommendation of the repeal and recreation of the Civil Service Ordinance, specifically addressing the hiring procedure for the Chief Deputy position
16. Discussion and possible recommendation to change the maximum age a dependent may have dental coverage, to mirror the age established by State and Federal regulations for health insurance, effective 1/1/13
17. Discussion and possible recommendation of a pay adjustment for non represented employees, including former AFSCME union positions/employees for 2012 and/or 2013
18. Review of Personnel Ordinances and consideration of additional ordinance to address the use of company time or resources for political activity
19. Report from Human Resources Director regarding vacant position and emergency help requests, new/change in position requests for 2013, reclassification requests and new hires starting above minimum
20. Set the 2012-2013 Human Resources Committee meeting schedule and agenda items for the next meeting
21. Adjournment

Next scheduled meeting: June 19, 2012 @ 8:30am.

The Committee may discuss and/or take action on any item specifically listed on the agenda

Individuals requiring special accommodations for attendance at the meeting should contact the County Administrator 24 hours prior to the meeting at 920-674-7101 so appropriate arrangements can be made.

Item #7

HUMAN RESOURCES COMMITTEE
MEETING MINUTES
April 17, 2012 @ 8:30am
Jefferson County Courthouse, Room 112

1. Call to Order. Meeting called to order at 8:30am by J. Braughler.

2. Roll Call. Present: J. Braughler, C. Peterson and L. Zastrow. Quorum established. Absent/Excused: M. Delany, D. Schultz. Also Present: G. Petre, T. Palm, J. Molinaro, S. Scheibel, J. Garity, T. Heinz, K. Buccholz, L. Anderson, E. Sadlowski, R. Welsch, P. Ristow.

3. Certification of compliance with the Open Meetings Law. Verification of notice of meeting by G. Petre.

4. Review of Agenda. No changes noted on the agenda.

5. Citizen Comments. None.

6. Approval of minutes. Motion by L. Zastrow, second by C. Peterson, to approve the March 6, 2012 minutes, as presented. Motion carried 3:0.

7. Communications. None.

8. Human Resources Director reviewed three retirements in the first quarter of 2012, to be presented at County Board.

9. Motion by L. Zastrow, second by C. Peterson, to convene into closed session pursuant to Wisconsin State Statues Section 19.85 (1)(b) and 19.85(1)(f), consideration of employee discipline, and consideration of employee(s) specific medical history as it relates to a leave of absence request. All members present, L. Zastrow, J. Braughler, C. Peterson responding "Aye". Moved into closed session at 8:33am.
   Note: Also in closed session during the presentation, including written stipulation regarding employee discipline were HR Committee members, J. Molinaro, T. Palm, G. Petre, S. Scheibel (advising the Committee), E. Sadlowski (representing the grievant), P. Ristow (representing management), the grievant and three additional employees authorized by the grievant. Only Committee members, J. Molinaro and S. Scheibel remained for discussion of the grievance from 9:28am – 9:45am.

10. Motion by L. Zastrow, second by C. Peterson, to reconvene into open session. All members present, L. Zastrow, J. Braughler, C. Peterson responding "Aye". Reconvened into open session at 9:45am.
    a. Motion by L. Zastrow, second by C. Peterson, to uphold G. Petre's decision to deny the grievance based on appeal timelines not adhered to per ordinance. Motion carried 3:0.
    b. Motion by C. Peterson, second by L. Zastrow, to deny a request to extend a leave of absence for another 6 months (in addition to the one-year already granted.) Motion carried 3:0.
    c. Motion by C. Peterson, second by L. Zastrow, to approve a leave of absence request through June 30, 2012, and up to one year (September 21, 2012) if needed and proper documentation is provided. Motion carried 3:0.

11. Next meeting scheduled at 8:30am on Tuesday, May 22, 2012 to include interview and selection of a firm to complete a classification and compensation study.

12. Motion by L. Zastrow, second by C. Peterson, to adjourn. Meeting adjourned at 9:52am.

_____ _____
Human Resources Committee Secretary Date

#9.a.

JEFFERSON COUNTY, WISCONSIN

Request for Proposals
For
2012 Classification and Compensation Study and Analysis

Request for Proposals
For
Classification and Compensation Study and Analysis

Request Release Date: April 19, 2012
Due Date: 4:00pm, May 15, 2012

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I. Background

Jefferson County, established in 1836, has 26 departments and an annual budget of $64.8million. The County operates under a traditional Board of Supervisors form of government with a County Administrator responsible for day-to-day operations, policy fulfillment and planning for the future. In addition, there are approximately thirty-nine (39) committees, boards, or commissions that have direct policy oversight responsibilities for various County departments.

Jefferson County is located in southeastern Wisconsin, and is bordered by the counties of Dodge, Dane, Rock, Walworth and Waukesha. Ideally located between the metropolitan areas of Milwaukee and Madison, Jefferson County offers a mixture of urban and rural life. With easy access via the I-94 and I-90 highway system, the County is characterized by rich agricultural areas, thriving family-oriented communities, diversified manufacturing, and highly valued natural resource features.

The County employs approximately 400 management, professional, technical, administrative, clerical and general labor employees (excluding represented law enforcement, contract, seasonal and occasional part-time employees) in approximately 224 authorized job classifications. The 2012 Classification Listings/Job Titles may be found in Appendix A.

II. Purpose of Request

Jefferson County is soliciting proposals from highly qualified consultants for the purpose of conducting a comprehensive compensation and classification study for all classified positions, excluding represented law enforcement positions.

Several compensation plans currently exist for the County.

- Positions previously represented by AFSCME under the former Courthouse, Professional Health and Professional Human Services union contracts are currently assigned within a grade and step based system with a total of 28 grades and 9 steps within each grade. This point factor Job Evaluation System was last reviewed and updated in 1995. The plan has been updated and revised through a reclassification process that is contracted with an outside private consultant. The current classification listing and pay scale may be found in Appendix B.
- Positions previously represented by AFSCME under the former Highway union contract are currently assigned within a grade and step based system with a total of 6 grades and 3 steps within each grade, except for clerical staff positions containing 5 steps. The plan had been updated and revised periodically through the negotiation process. The current classification listing and pay scale may be found in Appendix C.
- Non-represented positions, both exempt and non-exempt, are currently assigned within a grade and step based system with a total of 26 grades and 11 steps within each grade. This point factor Job Evaluation System was last reviewed and updated in 2002. The plan has been updated and revised through a reclassification process that is contracted with an outside private consultant. The current classification listing and pay scale may be found in Appendix D.

- For a point of reference, the current classification listing and pay scale for represented law enforcement may be found in Appendix E.

The goal of the County is to update the current classification and compensation system utilizing accepted practices in the management and design of compensation systems in accordance with applicable federal and state laws. In doing so, the objectives of the County are:

- *To attract and retain qualified workers who will be paid equitable salaries*
- *To provide fair salaries for all workers, including the ability to recognize job performance as a part of the pay plan*
- *To enable the County to maintain a competitive position with other comparable counties and private companies within the same geographic area*
- *To provide a compensation plan(s) easy to understand and administer and possibly simplifying the number of classifications and pay systems throughout the County*
- *To establish practices and policies, including overtime, to continue to meet the aforementioned objectives in future years*

III. Scope of Services

The study shall evaluate the County's present classification and compensation structure as compared to the specific job market for comparable positions in the public and private sectors, exclusive of represented law enforcement. The consultant shall perform or provide the following:

A. Conduct project information meetings with employees to explain the cope of the project, methods used, and the employee role.

B. Review all current job classifications, excluding represented law enforcement, and analyze, document and validate same for job definition or purpose; working relationships; essential functions conforming to ADAAA regulations; education, experience and other skills, knowledge and abilities; level of authority, including judgment and decision making, supervision received and exercised, and special requirements, including licensing/certification requirements and work environment.

C. Conduct interviews with employees and appropriate supervisory and management staff, as required.

D. Analyze all existing classifications and recommend additions and deletions to the current classification plan, as well as any other changes to the present compensation structure.

E. Identify other Wisconsin counties that are comparable to Jefferson County, establish appropriate benchmarking standards and conduct salary surveys as needed for similar positions with identified comparable counties and other local public and/or private entities.

F. Identify potential pay compression issues and provide alternative solutions.

G. Recommend classification of each position relative to exempt and non-exempt status, in accordance with Federal Fair Labor Standards Act (FLSA) and the Wisconsin Wage and Hour regulations.

H. Apply a job evaluation system to all positions to balance internal relationships with market factors.

I. Design pay range options that are consistent with the County's pay policy, outlining the pros and cons of each option.

J. Recommend allocations of each position to an appropriate classification and pay grade based on internal equity and marketplace considerations.

K. Provide a recommendation for a process for internal maintenance of the classification and compensation system to deal with positions that evolve over time or require different tasks than when first created.

L. Review current Compensation Ordinances and policies and recommend any changes to be consistent with the County's total compensation system. (Sections HR0300 to HR0390 of the County's Personnel Ordinance address these issues and are available at http://www.jeffersoncountywi.gov/UserFiles/Ordinances/Files/Personnel%20Ordinance/2012/Personnel%20Ordinance%20March%202012.pdf)

M. Assist the County in development and implementation of a total compensation policy that meets the needs of the County in fairness, internal equity, competitive compensation, and ease of administration. These should include, but not be limited to, the appropriate relationship between pay and benefits, the appropriate market(s), the County's intended target for pay practices in relation to the market, the frequency of review of this kind of compensation/classification study, a process for determining cost-of-living increases.

N. Conduct employee classification appeals after plan adoption. Appeals must be submitted within 30 days of plan adoption.

O. Present progress reports to the Human Resources Committee or County Board as requested, particularly at critical points in the study.

P. Present the final results of the study to the Human Resources Committee, Finance Committee, and the County Board of Supervisors.

Q. Present to the County a final report and overall plan that is clear and understandable, and summarizes the information gathering process, findings, and the estimated cost of wage recommendations and an implementation plan.

R. Consultant must agree to comply with all federal, state, and local laws, ordinances, rules, regulations and executive orders pertaining to unlawful discrimination on account of race,

color, creed, national origin, sex, marital status, disability or age, or any other characteristic as prohibited by law.

S. **Additional Alternative:** Discuss with County leadership the issue of pay progression with appropriate consideration for both length of service and performance. Make recommendation to consider ways to recognize employee excellence including options, feasibility and associated costs for the design and implementation of a pay-for-performance system.

IV. County Resources

The County will provide copies, in electronic format whenever possible, of all current pay ranges, job classifications, job descriptions, previous studies and any other available in-house information that the successful consultant may require to complete the study.

V. Requirements of the Proposal

Responses should be specific to each area of inquiry and in the order presented:

A. *Introduction*

Provide the official name, address, phone number, fax number and email of the consulting firm, as well as the name of the principal contact person and the name of the person authorized to execute the contract.

B. *Experience and Qualifications*

1. A brief description of the organization.
2. Names and a brief description of the experiences and qualifications of the proposed staff member(s) who will be performing the services.
3. Names of entities, especially governmental, where these persons have performed classification and compensation studies, along with reference contact name and title, telephone number and email address at each entity.
4. Names of entities, other than above, where your firm has performed classification and compensation studies in the past two years, along with reference contact name and title, telephone number and email address at each entity.

C. *Approach/Methods Used to Perform the Project*

1. Description of the basic philosophy of the consultant regarding the relevance and importance of job classification and employee evaluation systems, including information regarding the consultant's general approach to the development of job classifications and compensation pay system.
2. Methodology to be used in benchmarking and determining salary ranges.

3. Information about the job evaluation system to be used and examples of questionnaires which could be used to collect data. Include methods to check and verify the data submitted.

4. Description of training provided to County staff to ensure understanding of the system as well as ongoing maintenance of the plan.

5. An estimated timeframe the project will take from beginning date to completion date, including significant milestones.

D. *Cost Proposal*

1. The total not-to-exceed cost, as well as an itemized breakdown of the cost associated with major or important components of the study, as determined by the consultant. This includes any proposals for annual maintenance of the plan.

2. Clearly define, identify and provide an estimate of additional services and/or reimbursable services not included in the basic fee.

E. *Additional Material*

1. Alternate proposals identifying areas to reduce ultimate County costs are encouraged.

2. A sample of any standard contract form normally used by the consultant.

VI. Submitting Proposals

Interested firms must submit three (3) copies of their proposal within a single envelope or container, clearly indicating on the front of the envelope/container: PROPOSAL FOR CLASSIFICATION AND COMPENSATION STUDY. In addition, an electronic copy of the proposal must be emailed to the Human Resources Director at the email address below. Proposals are due by 4:00p.m. on Tuesday, May 15, 2012 to:

Terri M Palm, Human Resources Director
Jefferson County Courthouse
320 S. Main St.
Jefferson, WI 53549
(920)674-7103
terrip@jeffersoncountywi.gov

Non-disclosure of the data contained within a proposal cannot be guaranteed because of Public Records Laws.

VII. Selection Process

A. *Interview*

Firms selected to proceed to the next step of the selection process will be invited to make a short presentation before the Human Resources Committee, tentatively scheduled for Tuesday, May 22, 2012. The interview will enable your firm to discuss your proposal as well as answer follow-up questions.

B. *Criteria*

1. Professional experience conducting classification and compensation studies in similar-sized public entities.
2. Credentials of the individual(s) that will conduct the study
3. Understanding of county-related issues and employee relations
4. The professional reputation of the firm
5. The selection committee's confidence in the firm's ability, commitment and accessibility to provide the services required based on references, interviews and other supporting information.
6. Costs
7. Timeline for implementation

C. *Acceptance/Rejection of Proposals*

Final selection of a consulting firm for this engagement will be recommended by the Human Resources Committee to the County Board of Supervisors for its approval.

Jefferson County reserves the right to accept the proposal considered to be the most advantageous to the County and to reject any and all proposals at any time with no penalty and to waive immaterial defects and minor irregularities in proposals.

The County reserves the right to cancel or to reissue the RFP in whole or in part, prior to execution of a contract.

The County will not be liable for any costs incurred by the Consultant in preparation of a proposal submitted in response to this RFP, in conduct of a presentation, or any other activities related to responding to this RFP.

VIII. Miscellaneous Information

A. *Proposal Disposition*

All materials submitted in response to this request for information shall become the property of Jefferson County upon delivery. All material provided by the County to the selected consultant (eg. completed questionnaires) remains the property of the County.

B. *Equal Opportunity*

It is the policy of the County of Jefferson to not discriminate against any employee or applicant or independent contractor because of age, race, sex, creed (religion), color, disability or association with a person with a disability, sexual orientation, marital status or pregnancy, political belief or affiliation, military participation, use or nonuse of lawful products during nonworking hours, national origin, ancestry, arrest record or conviction record, (except as authorized by law), genetic information (including improper acquisition of genetic information), or any other characteristic as prohibited by law.

C. *Questions/Contact information*

Questions may be directed to:

Terri M Palm, Human Resources Director
Jefferson County Courthouse
320 S. Main St.
Jefferson, WI 53549
(920)674-7103
terrip@jeffersoncountywi.gov

APPENDIX A – 2012 Classification of Authorized Positions

2012
ADOPTED BUDGET
CLASSIFICATIONS OF AUTHORIZED COUNTY POSITIONS

COUNTY ADMINISTRATOR (3 FT)
1 County Administrator
1 Administrative Assistant – Confidential
*** 1 Management Analyst

CENTRAL SERVICES (7 FT)
1 Manager - Maintenance
1 Maintenance Worker II
1 Maintenance Worker I
2 Custodian II
1 Custodian I
1 Central Services Worker

CHILD SUPPORT AGENCY (11 FT, 1 student)
1 Child Support Director
5 Child Support Enforcement Specialist
2 Legal Assistant II
***1 Financial Support Specialist (funded PT)
1 Financial Support Specialist
1 Customer Service Representative
1 Co-op Student
NOTE: 2 Assistant Corporation Counsel (1FT and 1 PT) budgeted in CSA, but authorized in Corporation Counsel budget

CLERK of COURTS (29 FT, 4 PT, 8 SE)
1 Clerk of Circuit Court (Also appointed as Register in Probate)
3 Lead Deputy Clerk
*** 1 Lead Deputy Clerk
** 1 Deputy Register in Probate/Lead Juvenile Clerk
12 Court Clerk II – General
1 Court Clerk II-General/Deputy Register in Probate
1 Court Clerk II - Civil
* 1 Court Clerk II – General (PT)
*** 2 Court Clerk II – General (PT)
3 Judicial Assistant
*** Family Court Commissioner (Funded PT)
1 Family Court Commissioner
2 Family Court Counselor
1 Legal Secretary
*** 1 Family Court Office Clerk (PT)
**** Eliminate .5 Administrative Clerk/File Clerk (Full-time shared with LWCD)
*** 1 Circuit Court Commissioner (funded PT)
4 Judge (SE)
4 Circuit Court Reporter (SE)

CORONER (2 PT, OPTs)
1 Coroner (PT)
1 Chief Deputy Coroner (PT)
Pool of Occasional part-time Deputy Coroners, as needed

CORPORATION COUNSEL (4 FT, 1 PT)
1 Corporation Counsel
3 Assistant Corporation Counsel (2 FT, 1 PT)
1 Paralegal, Confidential/County Board Reporter

COUNTY BOARD (30 PT, 1 intern)
30 County Board of Supervisor (PT)
1 Communications Intern

COUNTY CLERK (3 FT, OPTs)
1 County Clerk
1 Administrative/Elections Clerk
*** 1 Administrative/Elections Clerk (Funded PT)
Election Pool Assistance (OPT – 300 hours)

COUNTY TREASURER (2.5 FT)
1 County Treasurer
1 Deputy Treasurer
.5 Assistant Deputy Treasurer (FT shared with Land Information Office)

DISTRICT ATTORNEY (11 FT, 1 PT 5.3 SE)
1 District Attorney (SE)
4.3 Assistant District Attorney (SE)
1 Office Manager
5 Legal Secretary
1 Legal Secretary/Receptionist
1 Victim Witness Coordinator
1 First Offender Program Director
***1 First Offender Program Secretary (PT)
1 Justice Information Sharing Coordinator
1 Paralegal

ECONOMIC DEVELOPMENT (1 FT, 1 PT)
1 Economic Development Director
1 Economic Development Secretary (PT)

EMERGENCY MANAGEMENT (1.4 FT)
1 Emergency Management Director
.4 Program Assistant (Shared FT with Parks)

FAIR PARK (4 FT, 5 OPT, 5 Seasonal, 15-20 Fair Week staff)
1 Fair Park Director
1 Fair Park Supervisor
1 Administrative Secretary
* 1 Marketing Assistant
1 Office Assistant (Seasonal)
2 Laborers (Seasonal)
3 Grounds Worker (OPT, 1000 hours)
* 2 Grounds Worker (OPT, 1000 hours)
2 On-site Caretaker (6 mo.)
Fair Time Staff (15-20)
**** Eliminate 1 Marketing Assistant (OPT)
**** Eliminate 1 Fairgrounds Maintenance Worker II

FINANCE DEPARTMENT (4FT, 1PT)
1 Finance Director
* 1 Advanced Fund Accountant
1 Payroll Account Clerk
1 Payroll Technician/Accounting Asst (PT)
1 Account Clerk-System Support
**** Eliminate .5 Advanced Fund Accountant (FT Shared with Human Services)

HEALTH DEPARTMENT (16 FT, 3 PT, OPTs)
1 Director/Health Officer
1 Public Health Program Manager
8 Public Health RN (6 FT, 2 PT)
* 1 Licensed Practical Nurse
1 WIC Project Director
1 Billing Clerk/WIC Clerk
1 Billing Spec./Cancer Grant Outreach Coordinator
1 Public Health Program Assistant
1 Personal Care Program Assistant
2 Public Health Technician
1 WIC Registered Dietetic Technician (PT)
Occasional PT RN's, Public Health Technicians and WIC Peer Counselors, as needed

HIGHWAY (57 FT, pool of seasonal workers)
1 Highway Commissioner

1 Operations Manager
1 Fleet Manager
1 Patrol Superintendent
1 Construction Superintendent
1 Assistant Superintendent
1 Accounting Supervisor
2 Account Clerk
1 Custodian
4 Equipment Mechanic II
8 Equipment Operator II
1 Equipment Parts Person
3 Highway Lead Worker
1 Sign Worker
1 Welder Fabricator
29 Highway Worker
Seasonal Positions (3,000 hrs)

HUMAN RESOURCES (5 FT)
1 Human Resources Director
1 Benefits Administrator
** 1 Human Resources Generalist
*/*** 1 Human Resources Associate
***1 Volunteer Services Coordinator

HUMAN SERVICES (140 FT, 12 PT)
ADMINISTRATIVE SERVICES DIVISION
1 Director of Human Services
1 Administrative Services Manager
1 Office Manager
1 Maintenance Supervisor
3 Account Clerk
2 Accountant
* 1 Advanced Fund Accountant
1 Medical Records/File Clerk
1 Lead Custodian
1 Janitor (PT)
1 IT Specialist
1 Protective Representative Payee
2 Building Maintenance Worker
1 Secretary – Alternate Care Coordinator
** 1 Medical Office Assistant
1 Appointment Secretary
1 Receptionist/Secretary
3 Appointment Secretary/Receptionist
1 Financial Intake Worker
**** Eliminate 1 Secretary
****Eliminate .5 Advanced Fund Accountant (FT shared with Finance)
****Eliminate 1 File Clerk
ADRC AND AGING SERVICES DIVISION
1 Aging and Disability Resources Manager
1 ADRC Coordinator
1 Aging Benefits Specialist
* 1 Aging Benefits Specialist (PT)
1 Disability Benefit Specialist
5 Nutrition Site Manager (PT)
*** 1 Nutrition Site Manager (PT)
1 Secretary – Nutrition Program Coord/LTS
* 1 ADRC Paraprofessional
1 Transportation Coordinator/Van Driver
1 Van Driver
2 Adult Protective Services Case Manager
1 Nurse Case Manager/ADRC
3 ADRC Social Worker
****Eliminate 1 Asst Aging Benefit Specialist (PT)
BEHAVIORAL HEALTH DIVISION
*** 1 Behavioral Health Resources Division Manager
1 Mental Health/AODA Supervisor
1Community Support Program Supervisor
1 Comprehensive Community Services Supervisor
7 Behavioral Health Specialist
4 Comprehensive Community Services Facilitator
* 1 Comprehensive Community Services Facilitator
1 Group Home Supervisor
1 Mental Health Technician
6 Group Home Worker (4 FT 2 PT)
1 Secretary – Community Support Assistant
1 Jail Case Manager/Behavioral Health Specialist
11Community Support Program Professional I/II
1 Alternate Care Coordinator
1 AODA Therapist/OWI Assessor
1 Financial Assistance Worker
11 Intake/On-Call Worker

**** Eliminate 1 Human Services Professional I/II
****Eliminate 1 AODA Therapist/OWI Assessor
**** Eliminate 1 Community Support Professional I/ II
**** Eliminate 1 Group Home Worker
ECONOMIC SUPPORT DIVISION
1 Economic Support Services Manager
1 Economic Support Specialist Supervisor
** 6 Economic Support Specialist (formerly Support Services Planner)
2 Economic Support Specialist
4 Financial Planner Resource Specialist
1 Secretary – Economic Support
2 Child Care Coordinator
FAMILY RESOURCES DIVISION
1 Family Resources Division Manager
1 Child Protective Services Supervisor
1 Intake and Juvenile Delinquency Resources Supervisor
1 Early Intervention Services Supervisor
** 1 Wraparound Supervisor
2 Community Services Wraparound Coordinator
8 Community Outreach Worker (6 FT, 2 PT)
1 Family Development Worker
8 Child Protective Services Ongoing Prof I
2 Early Intervention Service Coordinator
3 Early Intervention Teacher
1 Foster Care Coordinator
1 Personal Assistance Case Manager/
Family Support Coordinator
7 Human Services Professional I/II
**** Eliminate 3 Community Outreach Worker

LAND & WATER CONSERVATION (6FT, Intern)
1 County Conservationist
2 Resource Conservationist
1 Water Resource Management Specialist
* 1 Administrative Clerk
1 GIS & Land Use Technician
*** 1 Student Intern
**** Eliminate .5 Administrative Clerk/File Clerk
(FT Shared with Clerk of Courts)

LAND INFORMATION OFFICE (4.5 FT, Intern)
1 Director
1 Licensed Land Surveyor
1 Cartographer
1 Administrative Clerk
.5 Land Information Assistant (FT shared with Treasurer)
*** Student Intern

MANAGEMENT INFORMATION SYSTEMS (MIS) (8 FT, 1 PT, 1 STUDENT)
1 Systems and Applications Manager
1 Information Technology Manager
1 Systems Analyst
*** 1 Programmer Analyst
1 Senior Systems Analyst
1 Senior Micro Computer Specialist
1 Micro Computer Specialist
1 Microcomputer Technician
1 Central Duplicating Clerk (PT)
Student Hardware Technician

PARKS DEPARTMENT (5.6 FT, 4 PT, 7 seasonal/OPT)
1 Director

1 Parks Supervisor
1 Parks Construction & Maintenance Lead Worker
1 Building & Grounds Maintenance Worker
3 Parks Maintenance Worker (PT)
1 Administrative Secretary
2 Seasonal Worker
4 Grounds Worker (OPT)
.6 Program Assistant (Shared FT with Emergency Management)
*** 1 Volunteer Coordinator (PT)
1 Dog Park Attendant (OPT)

REGISTER OF DEEDS (4 FT, 1 PT)
1 Register of Deeds
1 Chief Deputy Register of Deeds
1 Deputy Register of Deeds I
1 Register of Deeds Data Entry Clerk (PT)
*** 1 Deputy Register of Deeds I

SHERIFF (125 FT, 6 PT, 1 LTE, 1 OPT, pool positions)
ADMINISTRATIVE/DETECTIVE DIVISION
1 Sheriff
1 Chief Deputy
*** 1 Undersheriff (OPT)
1 Captain
1 Confidential Secretary
1 Account Clerk
2 Sergeant
8 Detective
2 Secretary (1 FT, 1 PT)
1 Secretary Drug Task Force
1 Receptionist/Secretary
1 Clerk Typist
*** 1 Grant Funded LTE
PATROL DIVISION
1 Captain
6 Sergeant
34 Deputy
*** 1 Deputy (unfund 4.5 months, 1/1/12 – 5/15/12)
1 Secretary
1 Mechanic
SUPPORT SERVICES
1 Sergeant
5 Deputy
*** 4 Deputy
1 Clerical Assistant
Pool of part-time deputies, as needed
COMMUNICATION DIVISION
9 Communication Operator
1 Communication Supervisor
Pool of part-time Communication Operators, as needed
JAIL DIVISION
1 Captain
6 Sergeant
29 Deputy
2 Clerk Typist
1 Jail Food Service Supervisor
4 Cook (1 FT, 3 PT)
*** 1 Cook
2 Custodian II (PT)

UNIVERSITY EXTENSION (3 FT, pool, 4 SE, 1 intern)
1 Agricultural Agent (SE)
1 Family Living Agent (SE)
1 Community Development Agent (SE)
1 Youth Development Agent (SE)
1 4-H Summer Intern
2 Administrative Secretary
*** 1 Administrative Secretary
* Clerical Pool hours

VETERANS SERVICE (2 FT, OPT)
1 Veterans Service Officer
1 Veteran Benefits Specialist
1 Veterans Service Clerk (Pool – 966 hours)

ZONING (8 FT)
1 Planning and Zoning Director
*** 1 Zoning/Land Use Technician
1 Onsite Waste Systems Technician
*** 1 Zoning/Solid Waste Technician
1 Zoning/Onsite Waste Systems Technician
1 Zoning Assistant
1 Zoning and Solid Waste Program Assistant
1 Administrative Clerk

*** New Positions**
**** Reclassified/New Job Title Positions**
***** Unfunded Positions**
****** Eliminated Positions**
SE = STATE EMPLOYEE

APPENDIX B – Represented Position Listing/Pay Scale

JEFFERSON COUNTY REPRESENTED EMPLOYEES
JOB CLASSIFICATION LIST - GRADE ORDER
2011

GRADE	POSITION TITLE
5	Central Services Worker
	Custodian I-Central Services
	Family Court Office Clerk
6	Custodian II-Central Services
	Custodian II-Sheriff
7	Clerk Typist
8	Billing Clerk/WIC Clerk
	Central Duplicating Clerk
	Administrative Secretary-Parks
	Secretary - FOP
	Secretary - Detective/Patrol
	Secretary - Detective/Drug Task Force
	Receptionist/Secretary-Sheriff
9	Drug Task Force Program Assistant
	Personal Care Program Assistant
	Home Health Program Assistant
	Public Health Program Ass't
10	Cook-Sheriff's Dept
	Land Information Assistant/Clerical Assistant
	Deputy Register of Deeds I
	Buildings and Grounds Maintenance Worker
	Legal Secretary/Receptionist-DA
11	Account Clerk - Systems Support
	Account Clerk - Sheriff Dept
	Support Services Clerical Assistant
	Billing Specialist/Grant Coordinator
	Administrative Clerk-LIO
	Admin Clerk/Customer Service Specialist
	Administrative Clerk-LWCD
	Administrative Clerk-Zoning
	Court Clerk II (Civil)
	Court Clerk II (General)

Chief Deputy Register of Deeds
Deputy Register of Deeds I
Child Support Legal Assistant I
Fairground Maintenance Worker II
WIC Registered Dietetic Technician
Deputy Reg prob/Court Clerk Criminal
Payroll Account Clerk
Legal Secretary-Clerk of Courts?FCC
Legal Secretary-DA
Deputy Treasurer
Zoning Assistant

12 Administrative/Elections Clerk-County Clerk
Billing Specialist/Grant Coordinator
Judicial Assistant
Child Support Legal Assistant II
Maintenance Worker I-Central Services
Paralegal
Administrative Secretary-UWE
Administrative Secretary-UWE
Administrative Secretary-UWE
Administrative Secretary-Fair
Veterans Benefits Specialist

13 Chief Deputy Register of Deeds
Mechanic
Program Assistant-Parks
Zoning Program Assistant

14 Payroll Tech/Accounting Ass't
Communications Operator
Enforcement Specialist
Enforcement Specialist - Paternity
Financial and Software Support Specialist
Financial Support Specialist
First Offender Program Director
Parks Construction/Maintenance Lead
Maintenance Worker II-Central Services
Early Intervention Services Coordinator
Victim/Witness Coordinator

15 Justice Info Sharing Coordinator

16 Public Health Technician
AODA Therapist/OWI Assessor

18 WIC Project Director

19 Cartographer
GIS & Land Use Specialist
Community Support Program Prof. I

20	Human Services Professional I* Early Intervention Teacher ADRC Social Worker Adult Protective Services Case Manager
21	Human Services Professional II Personal Assistant Case Manager/Family Coord. LTS/Alzheimer Family Support Coordinator Child protective Services Ongoing Prof I
22	Public Health Nurse** Nurse Case Manager, Human Services Family Court Counselor Community Support Program II Alternate Care Coordinator Intake/On-Call Worker Foster Care Coordinator Jail Case Manager Child protective Services Ongoing Prof II Comprehensive Community Services Facilitator Behavioral Health Specialists
23	Lead Intake Worker

JEFFERSON COUNTY - REPRESENTED EMPLOYEES
07/04/2010 SALARY PLAN

GRADE	STEP 1	STEP 2	STEP 3	STEP 4	STEP 5	STEP 6	STEP 7	STEP 8	STEP 9	Step 10
1	$ 9.864	$ 10.154	$ 10.436	$ 10.724	$ 11.020	$ 11.296	$ 11.601	$ 11.866	$ 12.159	
2	$ 10.409	$ 10.713	$ 11.020	$ 11.309	$ 11.625	$ 11.930	$ 12.235	$ 12.540	$ 12.818	
3	$ 10.942	$ 11.257	$ 11.588	$ 11.894	$ 12.223	$ 12.540	$ 12.870	$ 13.173	$ 13.492	
4	$ 11.476	$ 11.803	$ 12.147	$ 12.475	$ 12.804	$ 13.148	$ 13.492	$ 13.830	$ 14.174	
5	$ 12.019	$ 12.363	$ 12.717	$ 13.071	$ 13.413	$ 13.782	$ 14.163	$ 14.465	$ 14.809	
6	$ 12.579	$ 12.944	$ 13.299	$ 13.655	$ 14.023	$ 14.376	$ 14.771	$ 15.138	$ 15.493	
7	$ 13.099	$ 13.475	$ 13.860	$ 14.250	$ 14.645	$ 14.986	$ 15.378	$ 15.773	$ 16.166	
8	$ 13.629	$ 14.023	$ 14.403	$ 14.809	$ 15.215	$ 15.619	$ 16.051	$ 16.419	$ 16.800	
9	$ 14.200	$ 14.618	$ 14.986	$ 15.389	$ 15.810	$ 16.229	$ 16.672	$ 17.077	$ 17.472	
10	$ 14.720	$ 15.150	$ 15.582	$ 15.989	$ 16.406	$ 16.836	$ 17.292	$ 17.739	$ 18.140	
11	$ 15.253	$ 15.696	$ 16.151	$ 16.597	$ 17.041	$ 17.456	$ 17.926	$ 18.357	$ 18.802	
12	$ 15.785	$ 16.254	$ 16.723	$ 17.205	$ 17.673	$ 18.171	$ 18.587	$ 19.030	$ 19.474	
13	$ 16.328	$ 16.824	$ 17.321	$ 17.800	$ 18.284	$ 18.762	$ 19.208	$ 19.665	$ 20.147	
14	$ 16.862	$ 17.357	$ 17.842	$ 18.322	$ 18.802	$ 19.298	$ 19.829	$ 20.323	$ 20.792	
15	$ 17.406	$ 17.926	$ 18.434	$ 18.981	$ 19.485	$ 20.006	$ 20.477	$ 20.983	$ 21.476	
16	$ 17.940	$ 18.471	$ 19.030	$ 19.562	$ 20.096	$ 20.615	$ 21.122	$ 21.631	$ 22.139	
17	$ 18.512	$ 19.041	$ 19.587	$ 20.134	$ 20.667	$ 21.211	$ 21.733	$ 22.276	$ 22.783	
18	$ 19.041	$ 19.602	$ 20.158	$ 20.716	$ 21.288	$ 21.846	$ 22.365	$ 22.923	$ 23.455	
19	$ 19.587	$ 20.158	$ 20.728	$ 21.326	$ 21.881	$ 22.467	$ 23.013	$ 23.584	$ 24.166	
20	$ 20.108	$ 20.691	$ 21.288	$ 21.869	$ 22.467	$ 23.049	$ 23.632	$ 24.227	$ 24.775	$ 25.168
21	$ 20.640	$ 21.237	$ 21.858	$ 22.467	$ 23.076	$ 23.697	$ 24.280	$ 24.837	$ 25.446	PH RN
22	$ 21.184	$ 21.947	$ 22.442	$ 23.049	$ 23.697	$ 24.305	$ 24.927	$ 25.522	$ 26.143	$ 28.324
23	$ 21.719	$ 22.352	$ 22.997	$ 23.632	$ 24.280	$ 24.927	$ 25.532	$ 26.169	$ 26.792	
24	$ 22.265	$ 22.923	$ 23.555	$ 24.227	$ 24.889	$ 25.522	$ 26.181	$ 26.803	$ 27.434	
25	$ 22.794	$ 23.468	$ 24.166	$ 24.798	$ 25.485	$ 26.155	$ 26.815	$ 27.462	$ 28.120	
26	$ 23.354	$ 24.027	$ 24.723	$ 25.406	$ 26.092	$ 26.778	$ 27.450	$ 28.135	$ 28.791	
27	$ 23.885	$ 24.572	$ 25.281	$ 25.977	$ 26.688	$ 27.385	$ 28.095	$ 28.756	$ 29.465	
28	$ 24.408	$ 25.141	$ 25.851	$ 26.563	$ 27.285	$ 27.982	$ 28.718	$ 29.441	$ 30.100	

APPENDIX C – Highway Position Listing/Pay Scale

JEFFERSON COUNTY HIGHWAY DEPARTMENT
JOB CLASSIFICATION LIST - GRADE ORDER
Rates as of 7/4/2010
(Steps)

	JOB TITLE	C 1st step	D 2nd step	E 3rd step
H20	Custodian Highway Worker	$ 20.171	$ 20.526	$ 20.919
H21	Equipment Hauler/Mech Equip. Maint. Person Equipment Mechanic I Equipment Operator II	$ 20.526	$ 20.919	$ 21.311
H22	Equipment Mechanic II Welder Fab. Ass't/ Equip. Mech	$ 20.919	$ 21.311	$ 21.668
H23	Engineering Aide Equipment Parts Person Sign Worker Welder Fabricator	$ 21.311	$ 21.668	$ 22.150
H24	Engineering Asst Highway Lead Worker Shop Lead worker	$ 21.668	$ 22.150	$ 22.618

		A 1st step	B 2nd step	C 3rd step	D 4th step	E 5th step
H16	Highway Account Clerk	$ 17.800	$ 18.140	$ 18.512	$ 18.917	$ 19.257

APPENDIX D – NonRepresented Position Listing/Pay Scale

PAY GRADE	NON-REPRESENTED POSITION LISTING POSITION - As of January 1, 2011
2	File Clerk/Secretary/Financial Intake (1250) Janitor
3	Lead Custodian (1276) Parks Maintenance Worker (0802) Nutrition Site Manager Secretary - Economic Development Secretary HS/Alternate Care Coordinator (1249) Secretary HS - Community Support Assistant (1244) Secretary HS (1241) Secretary HS (1246) Secretary HS (1247) Secretary-Economic Support (1242) Appointment Secretary (1248) Receptionist/Secretary (1240) Appointment Secretary/Receptionist (1251) Appointment Secretary/Receptionist (1252) Van Driver (1227)
4	Account Clerk Assistant Benefit Specialist Economic Specialist (1237) Economic Support Specialist Economic Support Specialist (1235) Child Care Coordinator (1238) Protective/Representative (1239) Financial Assistance Worker Community Outreach Worker (1218) Family Development Worker Mental Health Technician Lueder Haus Group Home Worker (1265) Nutrition Outreach Worker Confidential Secretary Secretary-Ntr Prg Crd/LTS Secretary/Medical Records Clerk Transportation Coordinator/Van Driver (1226)
5	Community Resource Coordinator/Wraparound Financial Intake Worker (1209) Financial Planner (1234) Financial Planner Resource Specialist (1235) Human Resources Associate (0104) Building Maintenance Worker (1299) Paralegal, Confidential (0702)

6	Accountant (1204) Accountant (1205) Benefits Specialist (1222) ADRC Benefit Specialist Wraparound Project Director Microcomputer Technician (2505) IT Specialist (1210) Micro Computer Specialist (2503) Paralegal II, Confidential Administrative Secretary-Confidential (0102) Parks Volunteer Coordinator
7	Office Manager (1005) Programmer Analyst (2506) Lead Deputy Clerk Jail Food Services Supervisor Volunteer Services Coordinator
8	Fund Accountant Economic Support Spec -Supervisor (1232) Office Manager (0601) Office Manager (1243) Surveyor (1601) Communications Supervisor (1512) Lueder Haus Manager (1263) Systems Analyst (2507) Soil Conservationist (1302) Resource Conservationist Water Resource Management Specialist Zoning/Solid Waste Technician (1807) Onsite Waste Systems Technician (1803) Zoning/Land Use Technician (1802) Zoning/On-Site Waste Mngm Technician
9	Register In Probate (1401) Benefits Administrator Sr. Micro Computer Specialist (2504)
10	Advanced Fund Accountant Emergency Management Director Veterans Service Officer (1701) Fair Park Supervisor (2304) Sergeant -Patrol (1509) Sergeant - Jail (1507) Sergeant - Detective (1506) Sergeant - Support Services Parks Supervisor (0805) Assistant Superintendent Early Intervention Service Coordinator (1259) ADRC Coordinator

11	Accountant (1106) Maintenance Manager (0201) Patrol Superintendent (1102) Heavy Maintenance Superintendent (1103) Maintenance Supervisor (1216) Sr Systems Analyst
12	Economic Development Director Highway Fleet Manager Public Health Program Manager (1002) W-2 Economic Support Supervisor (1231) Community Support Program Supervisor Delinquency Supervisor Child Protective Services Supervisor Comprehensive Community Support Supervisor Mental Health/AODA Supervisor
13	Asst Corporation Counsel Captain - Patrol (1503) Captain - Jail (1505) Captain - Administrative (1504) Highway Operations Manager Behavioral Health Division Manager Family Resources Division Manager Aging and Disability Division Manager Administrative Services Division Manager Systems & Applications Manager (2508)
14	Child Support Director Fair Park Director Information Technology manager (2501)
15	Chief Deputy (1502) Land Information Director (2001) County Conservationist (1301)
16	Finance Director (0505) Human Resources Director Family Court Commissioner (0901) Parks Director (0801) Zoning and Planning Director (1801) Family Court Commissioner/Guardian At Litem (0902)
17	Highway Commissioner (1101) Director/Health Officer (1001)
19	Director of Human Services (1201)
21	Corporation Counsel (0701)
23	County Administrator (0101)

Non-represented Pay Plan Matrix
Effective July 4, 2010

Grade	0	1	2	3	4	5	6	7	8	9	10
26	49.897	51.333	52.751	54.175	55.608	57.027	58.451	59.882	61.305	62.726	64.159
25	48.373	49.756	51.139	52.523	53.905	55.287	56.669	58.053	59.437	60.819	62.201
24	46.836	48.183	49.510	50.858	52.191	53.534	54.878	56.210	57.552	58.886	60.227
23	45.312	46.619	47.913	49.207	50.499	51.791	53.086	54.376	55.671	56.977	58.271
22	43.790	45.033	46.286	47.543	48.784	50.040	51.293	52.534	53.788	55.043	56.298
21	42.268	43.468	44.674	45.876	47.091	48.295	49.497	50.717	51.919	53.122	54.341
20	40.729	41.893	43.046	44.212	45.378	46.543	47.707	48.872	50.040	51.204	52.354
19	39.205	40.320	41.445	42.559	43.688	44.801	45.915	47.042	48.155	49.279	50.397
18	37.669	38.747	39.821	40.895	41.969	43.046	44.122	45.199	46.274	47.350	48.425
17	36.133	37.170	38.193	39.231	40.257	41.292	42.332	43.355	44.390	45.427	46.451
16	34.608	35.594	36.583	37.577	38.565	39.550	40.537	41.524	42.520	43.507	44.494
15	33.072	34.020	34.968	35.903	36.850	37.795	38.747	39.693	40.626	41.574	42.520
14	31.548	32.443	33.354	34.249	35.159	36.058	36.951	37.862	38.758	39.665	40.564
13	30.013	30.869	31.728	32.587	33.443	34.302	35.159	36.018	36.875	37.734	38.592
12	28.487	29.307	30.115	30.933	31.741	32.560	33.377	34.187	35.006	35.812	36.630
11	26.953	27.721	28.501	29.269	30.037	30.808	31.575	32.342	33.111	33.892	34.661
10	25.427	26.159	26.886	27.617	28.335	29.065	29.795	30.523	31.243	31.974	32.701
9	23.891	24.584	25.263	25.939	26.631	27.313	27.990	28.680	29.360	30.037	30.729
8	22.369	22.996	23.637	24.275	24.914	25.557	26.196	26.838	27.478	28.118	28.758
7	20.845	21.432	22.036	22.623	23.225	23.817	24.418	25.006	25.608	26.196	26.801
6	19.310	19.859	20.409	20.959	21.512	22.062	22.612	23.162	23.712	24.263	24.813
5	17.786	18.285	18.797	19.310	19.806	20.320	20.831	21.332	21.845	22.354	22.858
4	16.249	16.710	17.171	17.644	18.103	18.566	19.026	19.500	19.961	20.423	20.885
3	14.724	15.147	15.557	15.979	16.402	16.826	17.245	17.669	18.092	18.502	18.923
2	13.188	13.560	13.942	14.315	14.699	15.070	15.442	15.827	16.197	16.580	16.954
1	11.652	11.987	12.318	12.650	12.984	13.317	13.650	13.983	14.315	14.647	14.981

APPENDIX E – Represented Law Enforcement Position Listing/Pay Scale

JEFFERSON COUNTY SHERIFF'S DEPARTMENT JOB CLASSIFICATION LIST - GRADE ORDER

DEPUTIES	GRADE	A Start	B 6 Months	C 1 1/2 yrs	D 2 1/2 yrs	E 3 1/2 yrs
Effective 7/4/10	27	$23.205	$23.925	$24.750	$25.503	$26.431

DEPUTY - Part-time	GRADE	E Start
Effective 7/4/10	29	$16.650

DETECTIVES	GRADE	A Start	B 6 Months	C 1 1/2 yrs	D 2 1/2 yrs	E 3 1/2 yrs
Effective 7/4/10	28	$27.857	$28.310	$28.426	$28.543	$28.659

CARLSON
DETTMANN
CONSULTING

Proposal for

Jefferson County

2012 Compensation & Classification Study

Respectively Submitted:

May 14, 2012

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Appendix A: Job Description Questionnaire

Appendix B: Job Evaluation Summary

Appendix C: Partial Client List

Appendix D: Resumes

Appendix E: Sample Contract

I. INTRODUCTION AND BACKGROUND

Jefferson County Government (the County) has solicited proposals for professional services for the purpose of conducting a comprehensive compensation and classification study for all classified positions, excluding represented law enforcement positions. Carlson Dettmann Consulting, LLC (CDC) has provided human resource consulting services to the County for twenty years, and we are honored to have the opportunity to submit this proposal as requested.

Jefferson County has 26 departments and an annual budget of $64.8 million. The County operates under a traditional Board of Supervisors form of government with a County Administrator responsible for day-to-day operations, policy fulfillment and planning for the future. In addition, there are approximately thirty-nine (39) committees, boards, or commissions that have direct policy oversight responsibilities for various County departments.

The County employs approximately 400 management, professional, technical, administrative, clerical and general labor employees (excluding represented law enforcement, contract, seasonal and occasional part-time employees) in approximately 224 authorized job classifications. The pay plan covering these employees is the subject of this study.

Several compensation plans currently exist for the County.

- Positions previously represented by AFSCME under the former Courthouse, Professional Health and Professional Human Services union contracts are currently assigned within a grade and step based system with a total of 28 grades and 9 steps within each grade. The Point Factor Job Evaluation System was installed and maintained by CDC consultants and was last reviewed and updated comprehensively in 1995.
- Positions previously represented by AFSCME under the former Highway union contract are currently assigned within a grade and step based system with a total of 6 grades and 3 steps within each grade, except for clerical staff positions containing 5 steps. The plan had been updated and revised periodically through the negotiation process. The Highway department pay plan for represented staff was excluded from the earlier classification study.
- Non-represented positions, both exempt and non-exempt, are currently assigned within a grade and step based system with a total of 26 grades and 11 steps within each grade. Carlson Dettmann consultants installed the Point Factor Job Evaluation System, and last updated it in 2002. This

plan has been updated and revised through a reclassification process managed by our firm.

In 2011, the Wisconsin Legislature substantially revised the labor relations statutes impacting job classifications, compensation and related matters for the public employees throughout the state, including the County's workforce. The County has a desire to bring the County pay plan in line with both the private and public sector labor market and to recognize job performance as a part of its pay plan management.

These are significant changes, requiring careful, expert analysis. They also require extensive dialogue at the policy-making level. Carlson Dettmann Consulting has the experience necessary to manage this project successfully.

The goal of the County is to update the current classification and compensation system utilizing accepted practices in the management and design of compensation systems in accordance with applicable federal and state laws. In doing so, the objectives of the County are:

- *To attract and retain qualified workers who will be paid equitable salaries*
- *To provide fair salaries for all workers, including the ability to recognize job performance as a part of the pay plan*
- *To enable the County to maintain a competitive position with other comparable counties and private companies within the same geographic area*
- *To provide a compensation plan(s) easy to understand and administer and possibly simplifying the number of classifications and pay systems throughout the County*
- *To establish practices and policies, including overtime, to continue to meet the aforementioned objectives in future years*

The following is the proposal from our firm to conduct this project for the County.

II. OBJECTIVES OF THE STUDY/SCOPE OF SERVICES

Carlson Dettmann Consulting, LLC, would complete the following tasks in this study:

1. Review and analyze relevant organizational concerns and objectives. Determine current organizational needs in regards to a classification and compensation system.
2. Conduct project information sessions for staff to explain the scope of the project, methods used, and employee role.

3. Assist the County in developing a total compensation measurement method that will support the strategic management of its pay plans.
4. Document position responsibilities for all staff. Review all current job classifications covered by the study.
5. Apply and update our Point Factor Job Evaluations system for all positions to balance internal relationships with market factors. The System measures working relationships; essential functions conforming to ADA regulations; education, experience and other skills, knowledge and abilities; levels of responsibility, including judgment and decision making, supervision received and exercised, and special requirements, including licensing/certification requirements and work environment.
6. Conduct interviews with appropriate supervisory and management staff and, if the County deems necessary once we fully discuss our process, interview employees. It is our experience, however, that after completing our Job Description Questionnaire, minimal employee interviews are required, and we can avoid this additional expense.
7. Help County leaders establish a total compensation policy; e.g., the appropriate relationship between pay and benefits, the appropriate market(s), and the County's intended target for pay practices in relation to the market.
8. Identify other Wisconsin counties that are comparable to Jefferson County, establish appropriate benchmarking standards and conduct salary surveys as needed for similar positions with identified comparable counties and other local public and/or private entities.
9. Comment on the quality and cost of the benefit program and recommend modifications that seem warranted by the County's total compensation philosophy.
10. Analyze all existing classifications and recommend additions and deletions to the current classification plan, as well as any other changes to the present compensation structure.
11. Recommend pay range options that are consistent with the County's pay policy and reflect appropriate pay practices for public sector employees at these levels.
12. Recommend allocations of each position to an appropriate pay grade based on appropriate internal equity and marketplace considerations.
13. Discuss with County leadership the issue of pay progression with appropriate consideration for both length of service and performance. Make recommendations based on the identified pay philosophy, feasibility and affordability.
14. Review supporting pay administration policies, including overtime pay status and policies.

15. Review the current process for internal maintenance of the classification and compensation system, making recommendations as appropriate.
16. Conduct classification appeals following adoption of a new plan by Client. Appeals must be submitted within 30 days of plan adoption.
17. Review all subject positions and properly classify those positions in accordance with the Fair Labor Standards Act (FLSA) provisions relative to exempt and non-exempt status.
18. Produce an overall plan that is clear and understandable in order to promote employee and employer acceptance of the results.
19. Present, in person, progress reports and/or issues to the Human Resources Committee or County Board on a regular basis and at critical points in the study.
20. Present, in person, the final results of the study to the Human Resources Committee, Finance Committee, and to the County Board of Supervisors.
21. Present to the County the final report summarizing the information gathering process, findings, and the estimated cost of wage recommendations and an implementation plan.

PROJECT EXECUTION AND QUALIFICATIONS TO PERFORM

As noted earlier, Charles Carlson, Partner in CDC is very familiar with the Jefferson County organization and its compensation system. Specifically, Mr. Carlson has been responsible for all of Jefferson County's represented and non-represented classification work, excluding represented highway department employees and represented sworn Sheriff's department employees. In addition, Mr. Carlson handled several years of collective bargaining representation for Jefferson County. This detailed familiarity will enable us to complete this project efficiently and effectively.

The project would be executed as follows:

Phase One: Project Definition and Orientation

The first step in this project would be refinement of the project plan to meet the specific needs of the County. An initial meeting with the County will help ensure mutual understanding concerning the scope and task sequence of the study and everyone's role. Specific items to be addressed would include:

- The timetable for the project — overall and interim steps;
- The system and process our firm utilizes to determine the relative value of each position using our point-factor Job Evaluation System;
- The policy and intentions of the parties with respect to correcting inequities that may be identified; and,
- The manner of communicating project progress to employees.

At the outset of the study, we would ask the County to provide initial guidance on three key policy questions:

1. What markets does the County wish to use for which job classifications?
2. Where does the County prefer to position its pay plan(s) in those markets?
3. How does the County want to deliver future pay changes? Based on performance, length of service, changes in living costs, or some combination of two or more of these factors?

We would lead a discussion on potential answers to these three questions, offer our experience and suggestions, and develop the pro's and con's of the various alternatives. Typically, the decision-making process required to answer these three key policy questions evolves over the course of the project.

Phase Two: Position Analysis

Position analysis is the formal process we use to gather information about the duties, responsibilities and requirements of each position. In order to evaluate job content objectively and classify jobs, we need to document position responsibilities. This is the first part of the job evaluation portion of the project.

It is our experience that the best way to obtain accurate information is to have employees describe their own jobs in a systematic, complete manner because the person performing the job is the single best source of information about the job. The insights and opinions of the supervisor and department head are also important to consider.

The position analysis process begins when we conduct project orientation session(s) for covered staff to explain the project, identify each person's responsibility for job documentation and review, distribute the necessary materials, and answer questions. In terms of project explanation, we outline the reasons for the study, the manner in which it will be conducted, the responsibilities of each employee for job documentation, the approximate time involved, and the results to be expected. The meeting also serves to manage expectations and to minimize feelings of concern or anxiety on the part of the employees.

We use a Job Description Questionnaire (JDQ) as the main source of position information for our job analysis and evaluation. Jefferson County employees are familiar with our JDQ, having used it for a number of years. The JDQ is designed to collect detailed information on specific tasks and examples of each person's responsibility in key areas such as communication, mental effort, supervision, financial administration, working conditions, etc.

Because many Jefferson County employees are familiar with our JDQ, the job documentation process should run even more smoothly in this project. It is likely employees will want to review to older job documentation in preparing a new JDQ, and it will be easier for many of them to update existing information; others will want to write from scratch.

The JDQ is very important. Items on the Questionnaire relate directly to our Job Evaluation System. The JDQ is available in an electronic format and can be placed on a network or distributed via e-mail. Although the electronic version is the preferred method for gathering

information, a handwritten version is available. For readers of this proposal who are not familiar with our JDQ, we have included a copy of the electronic form as **Appendix A**; the JDQ also is available in long form for any employee who prefers to complete it by hand or typewritten.

Employees would be given a period of time (generally three weeks) to complete a JDQ, after which s/he would sign it and pass it on to their supervisor. Supervisors would review staff responses and comment independently, as needed. Human Resources would review the submissions for completeness before providing them to CDC for our analysis and evaluation.

In those instances where several employees perform similar functions, it is perfectly acceptable for them to collaborate on a single JDQ in the interests of time. However, any employee who wants to complete a unique JDQ is entitled to do so.

After CDC consultants have reviewed the JDQ's, we would meet with each department head to develop a clear understanding of underlying classification and compensation issues in their areas, the current status of performance management, and any change processes currently underway or anticipated in their organizations. These interviews are a critical part of the study because they give us the required organizational context and detail. JDQ's provide a point in time view of the organization, and we need to have a firm understanding of direction and momentum.

In our experience, we do not believe that it is necessary to incur the cost of individual employee interviews. We have made provision in our fee quotation for optional employee interviews on an as needed basis as determined by the County. And we do reserve the right to interview employees at our option and with no additional cost if the JDQ is not clear, and we ask each employee for contact information.

Phase Three: Job Evaluation

The purpose of job evaluation is to provide an objective means of ranking each position in an organization, independent of individual performance, into a hierarchy. Our job evaluation methodology has served Jefferson County well over the years, and it is based upon the determination of discernible differences in job content. Our system measures objective levels of the following dimensions (otherwise known as "compensable factors"):

- Formal Preparation and Experience
- Decision Making (Impact)
- Thinking Challenges and Problem Solving
- Interactions and Communications
- Work Environment

Each of these factors is broken down into sub-factors with point levels associated with measured levels on each factor. We have used the system in thousands of applications, and it consistently yields valid results. It has been our experience that these factors of internal job worth are consistent with values found in our client organizations. Because of their breadth,

they cover all main aspects of a job and are also seen as relevant to employees at all levels in the organization.

We would apply the job evaluation system to all of the documented job content. A summary explanation of the system is attached as **Appendix B**.

Our recommendations regarding job evaluation outcomes also would include a recommendation on employee exempt/non-exempt status in accordance with provisions of the federal Fair Labor Standards Act.

Phase Three: Market Analysis

One of the most significant results of changes in Wisconsin labor legislation is the opportunity to consider local labor market conditions in determining public employee compensation. For almost four decades, the operation of Wisconsin public employee labor law required an almost exclusive focus on public employee comparisons. The result was an insulated employment situation.

We recognize the significance of this change, and the requirement that we be accurate in our market measurement. We simply have to get this right, and it is here that our extensive background in labor market survey work is so beneficial to our clients. Our consultants have been measuring market conditions for decades in BOTH the public and private sectors.

From 1995 to 2008, Charles Carlson was CEO of Survey Research Associates/enetrix, a leader in Internet-based online salary survey research. The firm developed and managed surveys for the U.S. Chamber of Commerce, Credit Union Executives Society, American Hospital Association, Wisconsin and American Bankers Association, Independent Community Bankers Association, the American Society of Civil Engineers, the National Society of Professional Engineers, etc.

The firm developed and hosted the compensation survey sponsored by the Wisconsin Public Employer Labor Relations Association.

Gallup, Inc. acquired our Internet survey firm in 2008, and the partners supported Gallup's transition of the survey and technology sides of our business for two years. In 2010, Carlson and Dettmann re-acquired their human resource consulting practices.

We will conduct a unique, custom salary survey for Jefferson County as part of this project. This will entail identifying public and private sector employers of interest to the County, contacting them for their base pay data, and compiling summary results. We currently are conducting similar projects in Washington and Dodge Counties.

Using this information, we will analyze relevant labor market information for the County to determine competitiveness of base salaries. The County would have significant input into the selection of markets to be analyzed and will have had significant input into the determination of benchmark positions and survey target markets.

In addition to our custom survey on behalf of Jefferson County, we will reference excellent published data sources at our disposal in an extensive survey library we maintain for this purpose.

Phase Four: Total Compensation Analysis and Benefits Review

We approach human resource consulting from a total compensation perspective. As part of this phase of the project, we would conduct a review of the County's total compensation program, including development of cost estimates for the major benefit categories: required benefits (social security, Medicare, unemployment and worker's compensation), paid time off, retirement, and medical coverage.

Although it is impossible to obtain accurate local survey measures of benefits costs from private sector employers, we can develop reliable anecdotal information to guide the County's decision-makers. We also can develop reliable estimates of the dollar value of the County programs in determining future hiring salaries.

All of our research and practical experience indicates that most public employees have benefit programs involving employer cost contributions that are superior to area private sector employers. We would use our measures and estimates of the value of the County's benefits program to inform our recommendations on pay plan structure and competitive placement.

We would review all processes the County currently uses to provide an annual statement of fringe benefits and costs to employees, and we would develop recommendations on options for doing so differently if changes seem appropriate. It does not cost very much to create individual reports on total compensation, and it is an excellent value proposition.

Phase Five: Pay Plan Design

Using the results of the job evaluation process (internal relationships) and market data (external competitiveness), including the value of the benefits programs, we would design an appropriate salary structure and draft all of the necessary supporting policies. We would develop pay plan(s) that are appropriate for pay-for-performance or step-based increases, as determined by the County in our policy discussions.

We also would provide pay plan implementation alternatives should there be costs that require mitigation by implementation over time. If any positions are deemed to be overpaid, then some version of "red-circling" would be the suggested method of moving forward.

Phase Six: Performance Management

The County has indicated performance management is an important consideration of this project. It is our observation that performance management in public organizations is one of the top priorities facing governments across the country. Our governments at all levels are faced with significant revenue challenges. Yet, expenses and community needs continue to rise.

In order to balance the budget and meet community service requirements, governments have to get better at what we do, reduce expenses wherever possible, and, in some cases, reduce or eliminate non-essential services. Enhanced performance management practices are a critical step in this decision process.

As part of this project, we will inventory and assess current practices at the County and recommend changes. In doing so, we advocate aligning performance management with the County's strategic objectives, and we would work with the County to do using a top-down approach.

Should the County link pay to performance? Absolutely. At the very least, any step increase must require a positive performance evaluation. However, we should be able to do more, and we would guide the County through a discussion of how to do so and at what levels of the organization variable-based pay can be an option and what needs to be done to move in that direction.

Phase Seven: Public Presentations

Charles Carlson is an expert in public employee pay systems and would be the Project Director for the Jefferson County project and would be responsible for all public presentations. We advocate transparency in our consultations, and the County can expect an articulate, detailed discussion of our processes, findings, and recommendations.

Our approach emphasizes communication with employees at all steps of the process. We expect to conduct briefings, present status reports, and offer responses to frequently asked questions so everyone can stay informed as we progress.

We take great pride in our record of project adoption and system continuation. We develop and present solutions that are sound, understood, and stand the test of time. Our track record in Jefferson County speaks for itself. We have guided several pay plans through the adoption process and then maintained those plans successfully, and we fully expect to do the same in this project.

Phase Eight: Employee Appeals

We would develop and recommend an appeal procedure so that a staff member can request a review of the job evaluation and position classification outcome of this study. We advocate that this appeal process is critical to the validity and the acceptance of the process. An appeal of the job evaluation result refers to an objection to the pay grade in which the position has been placed.

We would conduct this appeal process after the study recommendations have been adopted by the County. The reasons why we recommend handling the appeal process in this way are twofold. First, employees have had an extensive opportunity to document their job and participate in the analysis process. The process is designed to be participatory and fair. Second, there really is nothing to appeal until the recommendations are adopted. The appeal process is keyed toward individual cases, not the system itself.

This appeals approach keeps the process manageable. Because of the substantial opportunities employees have had to communicate the content of their job, the number of appeals is generally very limited. We believe the standard for an appeal should be that the job has changed substantially during the study so that it could not have been evaluated accurately or there has been a gross error.

IV. CONSULTING TEAM AND QUALIFICATIONS TO CONDUCT THIS PROJECT

As indicated above, *Charlie Carlson* would be the Project Director. *Scott Dettmann*, his partner, is an expert in private employer pay systems and would be available for consultation on private sector compensation matters when needed. In addition to our public sector practice, our firm serves dozens of private-sector clients in Wisconsin labor markets. The advantage to the County is that we bring both perspectives to any engagement.

Charlie has been a Human Resources Professional for over 40 years and has developed public sector pay plan solutions for organizations from coast to coast; however, the primary focus of his career continues to be Wisconsin. He has maintained a successful relationship with Jefferson County for almost twenty years.

CDC currently has projects similar to Jefferson County's underway in the following Wisconsin counties and cities:

- Wood County (project launched)
- Waupaca County (project launched)
- Washington County (project nearing completion)
- Calumet County (project midway)
- Dodge County (project launched)
- St. Croix County (several projects completed; one midway)
- Polk County (project underway)
- City of Appleton (project launched)
- City of Fond du Lac (report to City Council; adoption expected very soon)
- City of Marshfield (project underway)
- City of Oshkosh (pay plan approved; appeals in process)

Contacts for each of these projects are listed below.

Katherine McCloskey, Senior Consultant, will be the Project Manager on this project and be responsible for the day-to-day interactions and coordination of the project, conduct orientations, and interviews, and manage the job evaluation portion of the project.

Katie holds a Master's degree in Human Resources and Labor Relations from the University of Wisconsin-Milwaukee and a Bachelor's degree from the University of Wisconsin-Madison. Katie began working in the area of Human Resources and Labor Relations since 1987. Charlie and Katie began a professional relationship in 1992.

Brian Ronk, Senior Consultant, would conduct survey market analysis. Brian is an expert in Market Analysis and has conducted hundreds of market studies and analysis in both the private and public sectors. Brian holds a Master's degree in labor relations from the University of Wisconsin-Madison. Brian has worked with us for over twelve years.

A partial client list is provided as **Appendix C**, and resumes for all three consultants who would be assigned to this project are enclosed as **Appendix D**.

References

The County requested that we provide references for clients for whom we have or are currently performing similar work. We offer the following, and if the County would like more references, we certainly can provide them:

Wood County
Ed Reed, Human Resource Director
ereed@co.wood.wi.us
715.421.8805

Waupaca County
Amanda Welch, Personnel Coordinator
awelch@co.waupaca.wi.us
715.258..6211

Washington County
Peter German, Human Resource Director
Peter.german@co.washington.wi.us
262.335.4496

Calumet County
Patrick Glynn, Human Resource Director
Glynn.patrick@co.calumet.wi.us
920.849.1611

Dodge County
Joe Rains, Human Resource Director
jrains@co.co.dodge.wi.us
920.386.3690

St. Croix County
Tammy Funk, Human Resource Director
tfunk@co.saint-croix.wi.us
715.808.2233

Polk County
Andrea Jerrick, Employee Relations Director
AndreaJ@co.polk.wi.us
715.485.9123

City of Appleton
Sandy Neisen, Human Resource Director
Sandy.neisen@appleton.org
920.832.6426

City of Fond du Lac
Deborah Hoffmann, County Attorney and Human Resource Director
dhoffmann@ci.fond-du-lac.wi.us
920.322.3625

City of Marshfield
Lara Baehr, Human Resources Manager
Lara.baehr@ci.marshfield.wi.us
715.486.2004

City of Oshkosh
John Fitzpatrick, Assistant County Manager
jfitzpatrick@ci.oshkosh.wi.us
920.236.5112

We also provide regular on-going classification and marketing pricing services for dozens of clients.

V. PROJECT TIMETABLE AND FEES

We would complete tasks described above for this project by implementing the following detailed work plan. The following timetable is suggested for this project:

Task	Anticipated Completion
Initial meeting with County Leadership	Week 1
Project Orientation/Initial On-Site Meeting	Week 2
Initial Meetings re Performance Management	Week 3
Completion of JDQ's	Week 7
Job Evaluations	Week 10
Market Survey and Analysis	Week 10
Review of Results & Fringe Benefit Discussions	Week 12
Draft Report	Week 14
Review/Discussions with County Leadership	Week 15
Presentation of Final Report	Week 16
Presentation to County Council for Adoption	As required by the County
Appeals Process	Following adoption

This timetable is subject to discussions and confirmation with the County. We are prepared to commence work immediately and can complete this project by the County's target date if authorized to proceed by June 1. This proposal will remain in effect until June 15, 2012.

CDC's normal professional fee for a project of this size and complexity would be $61,600; however, because of our history and experience working with Jefferson County and the survey work already underway in Dodge County, we can discount our fee 10% for a total cost of $55,000, inclusive of all expenses.

If the County decides it is necessary to conduct interviews with all employees covered by the study, the cost will be $75.00 per interview.

Jefferson currently contracts with us form job classification maintenance. We provide this service for a fee of $250 per review and would continue to offer this service to Jefferson County at that price.

In conclusion, we would be honored to conduct this important project for Jefferson County. We have the expertise and commitment to Wisconsin government required to serve the County successfully, and we hope to be selected as your consultant.

Respectfully submitted on May 14, 2012,

Charles E. Carlson, Partner

APPENDIX A

JOB DESCRIPTION QUESTIONAIRE (JDQ)

CARLSON DETTMANN CONSULTING, LLC
Job Description Questionnaire (JDQ)

This is an electronic format. The cells will expand as you type.

Name:	**Date:**
Employer:	
Title:	**Department:**
Work Location:	**Phone:**
Immediate Supervisor:	**Supervisor's Title:**

TIME EMPLOYED IN CURRENT JOB TITLE (in years and months):	
TIME EMPLOYED IN CURRENT DEPARTMENT (in years and months):	
TOTAL EMPLOYMENT WITH THE ORGANIZATION (in years and months):	
WORK HOURS (Start/Finish):	
FULL TIME:	REGULAR PART-TIME (%):
OTHER	

I. POSITION SUMMARY

Briefly state why your position exists and what you consider the most important impact the position has on the organization.

II. ESSENTIAL ACCOUNTABILITIES

Please identify the essential accountabilities of your position, which should be the most important responsibilities of the job. Indicate the approximate percentage of time spent on each accountability annually. Then explain how the outcomes could be measured.

% of Time	ESSENTIAL ACCOUNTABILITIES	HOW OUTCOMES COULD BE MEASURED

III. FORMAL PREPARATION / EXPERIENCE
Please answer the following based on the most representative combination of formal preparation and relevant experience to qualify for the position.
1. Formal preparation (or equivalent) required to qualify for the position. (Indicate your relevant formal preparation, as well.)
2. Relevant work experience required to qualify for the position. (Indicate your relevant experience as well.)
3. Note any other training that is required for the position. (Indicate additional training, licenses or certifications that you have.)

IV. JUDGMENTS MADE		
Please identify what you believe are the most important judgments/ decisions that you make in performing your job.		
EXAMPLES OF JUDGMENTS	WHO, IF ANYONE, REVIEWS THESE JUDGMENTS	WHAT IS THE IMPACT OF THESE JUDGMENTS

V. WORK RELATIONSHIPS	
Please identify the most typical work relationships of your position with other persons, functions, or organizations inside or outside of your own organization.	
Typical Work Relationships	**Purpose of the Relationship**

VI. WORK ENVIRONMENT		
% Inside (sheltered)	% Noise	% Travel Required
% Outside Work	% Fumes, Odor	% Temperature extremes
% Hazards	% Other (note)	
Are there any unusual physical requirements for your position? (Y/N)		
If yes, please explain.		

VII. PROBLEM SOLVING

Please identify the typical types of problems you solve on a regular basis in performing your job. Also, include information on who else may be involved in helping with problem resolution.

VIII. SUPERVISION / MANAGEMENT
Where it applies answer the following. Otherwise, put "Not Applicable" or "Don't Know."
Responsibility for others:
a. Number of People:
b. Their Position Titles:
c. Which, if any, of the following do you perform?
1. Directly Supervise?
2. Train / Instruct?
3. Give Work Direction?
4. Do Project Management?
5. Conduct Performance Reviews?
6. Discipline?
7. Hire?
Note assets, facilities, equipment, or funds, if any, for which you have some degree of accountability.

IX. UNUSUAL / UNIQUE MENTAL REQUIREMENTS
Does your position require any unusual or unique mental requirements?

X. ADDITIONAL DATA/NOTABLE INFORMATION
Please identify any other information that would help someone else understand your position more clearly:

XI. SUPERVISOR'S REMARKS

APPENDIX B

JOB EVALUATION SYSTEM SUMMARY

Section I

Job Evaluation

Job evaluation is a systematic process used to establish internal equity among positions as a foundation for the development of an overall classification hierarchy. It is an attempt to measure "the job," rather than the performance of an individual doing the job.

The process has evolved from basic job slotting to a more refined and systematic application of several compensable factors to positions being evaluated. Most current job evaluation methodologies are known as point-factor systems.

The starting point for all job evaluations is job documentation and job analysis. Generally, the best person to document a job is the person doing the work. We ask incumbent employees to complete our Job Description Questionnaire. Supervisors and department heads review the employee responses for accuracy and completeness. We read follow-up with clarifying interviews as necessary.

Once the job documentation is completed, we apply our point-factor job evaluation methodology. The system creates a total point profile based on the breadth and depth in each position from applying the factors of *Formal Preparation and Experience, Decision Making, Thinking Challenges and Problem Solving, Interactions and Communications, and Work Environment.*

To achieve and maintain effective and bias-free job evaluation, evaluators must:

- Exercise consistent application of the system, based on thorough training and a common understanding of the concepts of internal equity and position classification.
- Commit to addressing and removing any process bias that would result in over-evaluating or under-evaluating a position.
- Ensure that no evaluations are scheduled or completed without current and complete job documentation and relevant background information.
- Be sufficiently inclusive from a process standpoint to help ensure credibility of the job evaluation methodology throughout the organization.
- Be job content experts. In most assignments, we apply the evaluation system. In other applications, we rely on an internal job evaluation committee to conduct job evaluation, and members should represent the breadth and depth of the organization. Members without previous job evaluation experience cannot expect to produce accurate results without 20–30 hours of training and facilitation by a system expert for some amount of time.
- Submit their results to review by experienced experts within the organization to check for face validity.

Section II

The Job Evaluation Factors

Job evaluation is best understood as the systematic application of a set of written criteria to document job content to produce a point score. In this sense, it is the application of an abstract classification method called "job evaluation factors" to objective information about what people do.

Each factor includes definitions of various levels that we can apply to job content to determine what is the appropriate "score" on that factor. The evaluation factors and the defined levels for each factor correspond to sections of the Job Description Questionnaire, so the evaluation is verifiable in the sense that we actually could observe work being performed that corresponds to the written description. In other words, the abstraction has meaning in the real world of work.

When finished, we total the scores on each factor to obtain the overall point value for the job. Having a point score allows us to compare and contrast jobs that are frequently quite dissimilar in order to establish a job hierarchy and classification system.

The factors in our job evaluation system are as follows:

A. Formal Preparation and Experience

In applying this factor, the evaluator determines the most representative combination of formal preparation and experience typically required to qualify for the position being evaluated. It is important to verify the minimum acceptable qualifications of the position by reviewing the current job description questionnaire and any additional job documentation available to evaluators.

Sub Factor 1—Formal Education
The knowledge accumulated through formal preparation/training/education that is distinguished by a curriculum and testing of that accumulated knowledge.

Sub Factor 2—Experience
The most representative profile of relevant prior experience required to qualify for the position being evaluated.

B. Decision Making (Impact)

In applying this factor, the evaluator determines the freedom to act that is delegated to the position, the extent of the organization affected by those actions, and the best characterization of decision making typical of the position being evaluated.

Sub Factor 1—Freedom to Act
The most representative level of autonomy delegated to the position for initiating actions or making decisions.

Sub Factor 2—Extent of Actions Taken
The breadth of the organization effected by actions taken that would be typical for the position—from jobs where actions affect only their job to jobs where effects are seen organization wide.

Sub Factor 3—Impact of Judgments
The degree of decision making that is most representative, from jobs where information is provided to others for their decision making to jobs where the responsibility for final decisions is clear and ongoing in most cases.

C. Thinking Challenges and Problem Solving

In applying this factor, the evaluator first determines the *representative* thinking challenges and problem solving required on an ongoing basis, and then determines the depth of intellectual response to those challenges and the creativity involved in solving problems. The focus is on representative thinking challenges and problem solving as opposed to possible, but highly unlikely, situations.

Sub Factor 1—Context and Complexity
The context and complexity of challenges/problems in relation to established procedures, protocols, and policies—from jobs with minimally complex procedures to jobs with considerable complexity and only very broad guidance.

Sub Factor 2—Required Response
The depth of response required by the position—from jobs with generally clear-cut responses to jobs where responses require the development of original, creative solutions at the level of scientist, composer, or similar profession.

D. Interactions and Communications

In applying this factor, the evaluator first determines the context of business interactions and communications that are an ongoing part of performing the position being evaluated—from answering requests for basic information to the most critical operational and governance issues in the

organization.

Second, the evaluator determines the outcomes, effects, and impacts of these interactions and communications in the organization—from jobs where the impact is generally limited to effective working relationships to jobs where interaction and communications primarily and regularly deal with the most major operational and/or governance issues in the organization. The evaluator recognizes the impact of such communications both inside and outside of the organization.

E. Work Environment

In applying this factor, the evaluator first determines the potential for injury in performing the job, including the identification of what recognized health hazards regularly exist in the typical work environment.

The second sub-factor measures the *physical requirements* to perform the job being evaluated as expected and within established organizational policies related to good safety practices—from jobs with a low degree of physical effort to jobs that require physical activity which is a continuous, major effort that could comprise most, if not all, of the position's work time.

Factor Weightings

The job evaluation factors are weighted based on expert experience and knowledge regarding the relative importance of these factors across organizations. These weightings consistently produce job evaluation scores and relative rankings that are highly correlated with market pay practices. The factor weightings are as follows:

1. Formal Preparation and Experience	25%
2. Decision Making (Impact)	32%
3. Thinking Challenges and Problem Solving	16%
4. Interactions and Communications	18%
5. Work Environment	9%

In the system points are allocated to the levels within each sub-factor. A total job evaluation score results from adding the points from each factor. We then group positions into grades according to point scores based on professional judgment of our compensation professionals.

APPENDIX C

PARTIAL CLIENT LIST

Carlson Dettmann Consulting LLC
Partial Client Listing

Adams County, WI
Albany Chicago Company
Amcor Flexibles, Inc.
American TV and Appliance, Inc.
AnchorBank fsb
Andis Company
Arcadia Healthcare, Indianapolis, IN
Ariens Company
Associated Physicians
Blood Centers of America
Benz Oil
Briggs & Stratton
Brenner Tank Co.
Broan Nu-Tone LLC
Brown County, WI
Burnett County, WI
Calumet County, WI
Cambridge Major Laboratories, Inc.
Capital Area Reg. Planning Commission
Care Wisconsin, Inc.
Castle Pierce Printing Company
CCI Systems, Inc. MI
Central Companies, OH
Chippewa County, WI
Chippewa Valley Technical College, WI
Christ Church Nashville, TN
City of Altoona, WI
City of Appleton, WI
City of Atlanta, GA
City of Baraboo, WI
City of Brillion, WI
City of Brooklyn Park, MN
City of De Pere, WI
City of Eau Claire, WI
City of Fitchburg, WI
City of Fond du Lac, WI
City of Green Bay, WI
City of Greenfield, WI
City of Hartford, WI
City of Irvine, CA
City of Kaukauna, WI
City of La Crosse, WI
City of Mequon, WI
City of Merrill, WI
City of Neenah, WI
City of New Berlin, WI
City of Oak Creek, WI
City of Oak Creek Library Board, WI
City of Oconomowoc, WI
City of Oconomowoc Library Board
City of Oshkosh, WI
City of Platteville, WI
City of Portage, WI
City of Racine, WI
City of River Falls, WI
City of River Falls Utilities, WI
City of San Francisco, CA
City of Sheboygan, WI
City of South Milwaukee, WI
City of South Milwaukee Library Board, WI
City of South Milwaukee CDA
City of Stevens Point, WI
City of Truckee, CA
City of Watertown, WI
City of Wausau, WI
City of Wauwatosa, WI
City of West Bend, WI
City of Whitewater, WI
Clark County, WI
Columbia County, WI
Columbus Chemical Industries, Inc.
Columbus Community Hospital
Conley Publishing Group Inc.
Cornerstone Business Services
Costa Mesa Water District, CA
Crane Engineering Sales, Inc.
Crawford County, WI
Credit Union Executive Society
Cuila, LLC, CO
Curt G. Joa Company Inc.
Cuyahoga County, OH
Dean Distributing, Inc.
Dean Health Systems
Delta Dental of Wisconsin
Design Concepts, Inc.
Dickten Masch Plastics
Directions, Inc.
District of Columbia, DC
District of Columbia Retirement Board, DC
Door County, WI
Dorner Manufacturing Company, Inc.
DSI Real Estate Group
Dutchland Plastics, Inc.
East Central Wis Reg. Planning Comm.
Eau Claire County, WI
EES-BT, Inc.
Elgin Community College, IL
Employee Benefits Corporation
Energis High Voltage
First Judicial District of Philadelphia, PA
Flambeau Corporation
Fond du Lac County, WI
Frabill, Inc.
Franke Foundation
Franklin County, OH (Columbus)
Glenroy, Inc.
Grant County, WI
Green Bay Metropolitan Sewerage District, WI
Group Health Cooperative
Hamilton County, IN
Heart of the Valley Metro Sewerage District, WI
Hellenbrand Water Conditioners, Inc.
HUSCO International
Iconica, Inc.
Illinois Math and Science Academy, Aurora, IL
Iowa County, WI
J.J. Keller & Associates, Inc.
Jefferson County, WI
Kenosha City and County Joint Services, WI
Kenosha County, WI
Kentucky Retirement System
Kewaunee County, WI
Kim Central Credit Union
La Crosse Public Library, WI
Lewis and Clark Community College, IL
Lincoln County, WI
Lincoln Land Community College, Springfield, IL
Madison Family Dental Associates
Madison Metropolitan Sewerage District
Manitowoc County, WI
Marinette County, WI
Marquardt Village
Marquette County, WI
Martin Agency
Masters Gallery Foods, Inc.
Mayville Engineering Co., Inc.
McFarland School District, WI
MCL Industries, Pulaski WI
Medtec Ambulance Corporation, IN
Menominee County, WI
Meriter Health Services, WI
Metal Technologies, Inc.
Milwaukee Metropolitan Sewage District, WI
Milwaukee Public Schools, Milwaukee, WI
Mississippi Valley Regional Blood Center, IA
MSI General Corporation
National Premium, Inc.

N.E.W. Plastics, Inc.
Northcentral Technical College, WI
North Shore Bank
Oakwood Village
Oneida County, WI
Oshkosh Floors
Oshkosh Corporation
Outagamie County, WI
Outreach Programs
Palmer Johnson Yachts
Parts Now!
Packaging Dynamics Inc, Thilmany Division
Pemco, Inc.
Pharmacy OneSource
Physicians Plus Insurance Corp
Pierce County, WI
Placon Corporation, Madison WI
Poblocki Sign, WI
Polk County, WI
Portage County, WI
Prairie du Chien Memorial Hospital
Progressive Converting Inc.
Property Loss Research Bureau, IL
Price County, WI
Printron Engravers, Inc.
Racine County, WI
Racine Metal-Fab, Inc.
Racine Water/Wastewater Utility, WI
Reedsburg Area Medical Center
Research Products Corporation
Riverview Hospital Association
Rock County, WI
Rockline Industries, Inc.
Rock Valley College, IL
Rowland Reading Foundation
Rural Wisconsin Health Cooperative
Saint Paul's Baptist Church, Richmond, VA
Sanamax Corporation
Sauk County, WI
Schenck/Accurate, Inc.
Serigraph, Inc.
Shared Magnetic Resonance Imaging, Inc.
Shawano County, WI
Sheboygan County, WI
Soderholm Wholesale Foods
Southwest Wisconsin Technical College
Southeast Regional Dialysis, Inc. IA
Spacesaver Corporation
Springs Industries, Inc.
Sub-Zero Freezer/Wolf Appliance Co
Sun Prairie Area School District, WI
Sysco Foods of Southeastern Wisconsin
Taylor County, WI
Terrace Homes, Inc.
The Employers Healthcare Alliance
Therma-Stor, LLC
Times Printing
Town & Country Bank, MO
Town of Rome, WI
Trico Corporation
University of Wis Medical Foundation
University of Wisconsin System
Veridian Homes LLC
Vernon County, WI
Village of Campbellsport, WI
Village of East Troy, WI
Village of Greendale, WI
Village of McFarland, WI
Village of Menomonee Falls, WI
Village of Shorewood Hills, WI
Village of Waunakee, WI
Vision Forward of Wisconsin
Walker Stainless Equipment Co., Inc.
Walworth County, WI
Washburn County, WI
Washington County, WI
Waukesha County, WI
Waukesha County Technical College, WI
Waupaca County, WI
Waushara County, WI
WEA Insurance Trust
Weasler Engineering Company, Inc.
Webcrafters, Inc.
Western Forge & Flange Company,TX
Winnebago County, WI
Wisconsin Bankers Association
Wisconsin Builders Association
Wisconsin Hospital Association
Wisconsin Housing and Econ Development Authority
Wisconsin Management Company
Wisconsin Indianhead Technical College
Wisconsin Realtors Association
Wood County, WI
YWCA of Milwaukee

APPENDIX D

RESUMES

CARLSON DETTMANN CONSULTING LLC

CHARLES E. CARLSON, CCP

Forty years experience in human capital development as a consultant, executive, and teacher. Services include strategic human capital planning, human resource policy, design and implementation of comprehensive pay and benefit systems, employee relations assistance, organizational design, employee selection, and management and supervisory training.

SUMMARY OF PROFESSIONAL EXPERIENCE

Principal, Carlson Dettmann Consulting LLC Human resource and management consultant.

1996-2010 President and CEO, enetrix, LLC until 2008. Services including human capital consulting services and Internet-based survey research and administration. Gallup, Inc. acquired enetrix in December 2008, and enetrix became an operating division of Gallup. Strategic Consultant, Gallup Consulting, as part of transition agreement expiring in September 2010.

1985–1991 and 1995–1997 President, Carlson Associates, Inc., a human resource consulting firm based in Madison, Wisconsin. The firm provided a full range of human resource services to client organizations, including compensation management, policy consultation, and collective bargaining representation. Clients include for-profit, public, and not-for-profit organizations.

1991–1994 Senior Manager, David M. Griffith & Associates, Ltd. Responsible for the Human Resources Management consulting practice of David M. Griffith & Associates, Ltd. in Illinois, Wisconsin, and Missouri. Also provided technical leadership on key compensation projects throughout the United States.

1982–1985 Director of Personnel for University of Wisconsin Hospital and Clinics. Reported to the Chief Executive Officer. Responsible for a leading a comprehensive personnel program including recruitment and staffing, employee relations, wage and salary administration, and Affirmative Action. The

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carlsonhrconsultant@gmail.com

organization included over 500 academic staff of the University and 2,500 classified civil service staff, the majority of whom were represented by seven bargaining units.

1977–1982 and 1985–1988 Negotiator representing the Chancellor's Office, University of Wisconsin–Madison. Chief spokesperson for the University in negotiations with the Teaching Assistants Association, Wisconsin Federation of Teachers, AFL-CIO. Also served as chief negotiator for various public sector clients as a consultant.

1972–1974 Personnel Director, City of Beloit, Wisconsin. Responsible for the full range of personnel and labor relations functions. Responsibilities included implementation of a classification and compensation system and coordination of collective bargaining with three unions.

ADDITIONAL PROFESSIONAL EXPERIENCE

1971–1972 Reporter and Editor, Beloit Daily News, Beloit, Wisconsin.

1970–1971 Executive recruiter, VIP, Inc., Los Angeles, California

EDUCATION AND ADDITIONAL BACKGROUND

University of Wisconsin–Madison, Master of Arts, Public Administration, 1976. Additional graduate work at the Industrial Relations Research Institute, University of Wisconsin–Madison.

University of Illinois–Urbana, Bachelor of Arts, 1968, Political Science and Economics.

Certified Compensation Professional (CCP) by the American Compensation Association/WorldatWork.

Part-time Adjunct Assistant Professor, University of Wisconsin–Milwaukee in the Industrial Relations Masters program. Instructed graduate students in compensation management and ethics as well as supervising Master's candidates' projects.

Conference speaker for numerous professional and trade associations.

Represented management in negotiations with the following unions: Teamsters; United Professionals for Quality Health Care; International Association of Machinists; International Brotherhood of Electrical Workers; American Federation of State, Council and Municipal Employees; Orange County Employees Association; Irvine Police Association; Wisconsin Professional Police Association; International Association of Fire Fighters; Labor Association of Wisconsin; and the Wisconsin Federation of Teachers.

U.S. Army, honorably discharged. Personnel Specialist, Edgewood Arsenal, Maryland and Information Specialist, Vietnam.

Former Member, Board of Directors, Meriter Retirement Services and Dane County Red Cross, Madison, WI.

Katherine R. McCloskey
825 Thomas Drive
Sun Prairie, Wisconsin 53590
(608) 334-5283
ktcloskey@yahoo.com

Summary
An independent self-starter who remains focused on the task at a hand; ability to manage multiple of variables and divergent personalities and opinions; enjoys working in a dynamic, changing environment and rises to the challenge of embarking into a variety environments and assessing a situation; adept at surfacing new options and alternatives; finding the best path to accomplishing a task comes naturally; strong communicator with excellent public speaking skills; a good team player who takes full responsibility for the success or failure of projects; years of studying jobs and working with a variety of organizations provides the ability to assess talents, skills, and abilities needed to accomplish a job or task.

Education

Masters in Human Resources and Labor Relations
University of Wisconsin-Milwaukee, 1992
Bachelor of Arts, Psychology/Sociology
University of Wisconsin-Madison, 1987

Work Experience

Senior Human Resource Consultant 2007- Present
Carlson Dettmann Consulting, LLC and Gallup, Inc, Enetrix
Provide quality, comprehensive human resource consultation to public, private, and not-for-profit employers. Services provided include design and implementation of comprehensive pay systems, personnel policy development, employee and labor relations assistance, staffing, and management and supervisory training. Position requires working with a variety of Committees, Boards, and Executive staff to gain approval and consensus on various personnel and labor relations issues. A thorough understanding of jobs and the employee-employer relationships are an integral part of this position.

Independent Human Resource Consultant 1998-2000 & 2005-2007
Consulted with clients on recruitment, selection, compensation development, employee relations, grievance arbitration, and policy administration. Participated in executive recruitment, developed employee handbooks and standard operating procedures, developed surveys, compiled data, produced reports, conducted job analysis and job interviews, advised clients on employee relations issues, and conducted grievance investigations. *Services provided on a part-time basis as a sole proprietor or limited term employee.*

Human Resources Manager, *Heartland Properties Inc.* 1992-1995
Developed a new Human Resources department from inception. Responsible for all aspect of Human Resources including recruitment, selection, compensation, benefits, performance management, payroll supervision and employee relations.

Human Resources Consultant, *David M. Griffith & Associates* 1991-1992
Developed compensation plans for public sector clients and assisted clients with collective bargaining and grievance arbitrations. Duties included job analysis, interviews, survey development, report writing, grievance investigations, collective bargaining preparation, and consulting on employee relations issues.

Employee Relations Specialist, *Racine Unified School District* 1988-1991
Involved in all aspects of the collective bargaining process. Duties included developing and costing compensation and benefit packages, drafting and implementing contract language, investigating grievances, interviewing witnesses, preparing exhibits, drafting briefs, advising and training managers on contract administration and personnel issues, chief spokesperson responsibilities when bargaining with the smaller unions.

Skills &Activities
Proficient on Microsoft Word; Strong Microsoft Excel skills; Chairperson/Coordinator for various school functions, volunteer public speaker, announcer for youth events; Spanish conversation group; interview committees; school classroom volunteer.

BRIAN RONK
3202 Leyton Lane
Madison, WI 53713
ronkhrconsultant@gmail.com
(608) 334-7326

PROFESSIONAL EXPERIENCE

Compensation Consultant, January 2012 to Present
Carlson Dettmann Consulting, Middleton, WI

- Senior consultant and analyst; expert in market pricing and pay plan design,

Business Owner / Compensation Consultant, September 2003 to 2011
Ronk Consulting LLC, Madison, WI

- Recommend compensation solutions to private and public sector clients primarily through: job evaluation, creating and administering custom market surveys, analyzing market compensation data, designing and recommending pay ranges and merit-based pay, and determining cost of compensation recommendations
- Designed, tested, and implemented a unique point factor job evaluation system for a health care client
- Perform most of the duties and responsibilities listed under the Compensation Consultant role
- Extensive work under contract for Dettmann Consulting LLC.

Compensation Consultant, March 2000 to September 2003
Carlson Dettmann Consulting (a division of Enetrix, Inc.), Middleton, WI

- Met with clients to discuss proposed compensation projects and recommended services
- Interviewed client employees to analyze job responsibilities and answer any questions or concerns employees had about a compensation project
- Evaluated jobs using a point factor job evaluation system and recommended job grades; composed job descriptions
- Designed and administered custom compensation and benefits market surveys; administered year-round, online compensation surveys
- Analyzed market data from published and custom surveys
- Designed pay ranges using a variety of accepted compensation techniques, including linear and non-linear regression
- Designed tables and graphs, and composed comprehensive written reports, summarizing project findings
- Met with key client contacts and general employees (through presentations) to discuss project findings and recommendations
- Analyzed employee appeals to consultant recommendations and job reclassification documentation; composed final job grade recommendations and discussed with clients
- Determined cost of proposed compensation recommendations, including executive incentive plans
- Made recommendations on positions' Fair Labor Standards Act exempt / non-exempt status
- Spoke at conferences to discuss Carlson Dettmann's compensation consulting services
- Provided work direction to administrative staff

Consulting Analyst, May 1999 to March 2000
James and Scott Associates (now part of RSM McGladrey, Inc.), Milwaukee, WI

- Provided consulting services to private and public sector clients
- Evaluated jobs using a point factor job evaluation system and recommended job grades
- Analyzed market data from published and custom surveys
- Designed pay ranges using a variety of accepted compensation techniques, including linear and non-linear regression
- Met with key client contacts to discuss project findings and recommendations

Labor Relations Intern, September 1998 to May 1999
United Professionals for Quality Health Care, SEIU District 1199W, Madison, WI

- Designed and administered a grievance/arbitration database using Access to assist representatives in dealing with labor problems
- Assisted union representatives at arbitration hearings and in writing legal briefs
- Costed-out various contract proposals
- Designed membership pay satisfaction survey and analyzed responses

Human Resources Intern, May 1998 to August 1998
Chrysler Corporation – Transmission Plant, Kokomo, IN

- Performed various project management responsibilities in labor relations, health and safety, and human resources administration
- Assisted in building rapport with UAW and hourly employees through problem solving in grievance meetings
- Through the safety department, assisted in preparing the plant for a corporate safety audit
- Assisted in the development of an automatic wage progression system for hourly employees

Project Assistant, September 1997 to May 1998
Office of State Employment Relations, Madison, WI

- Designed and administered a grievance/arbitration database using Access to assist labor relation specialists in dealing with labor problems
- Contacted union representatives at various state agencies to ensure they had updated personnel information

EDUCATION

University of Wisconsin-Madison, Masters Degree – Industrial Relations, May 1999
Chrysler Fellowship and Summer Internship; GPA: 3.9/4.0
University of Wisconsin-Madison, Bachelor of Science – Psychology, May 1996; Deans List, 1994 & 1995
Independent Study of Accounting

RELEVANT COURSEWORK

Human Resource Management, Human Resources Skills for Managers, Collective Bargaining – Arbitration, Equal Employment Law, Compensation Theory and Administration, Research Methods I and II

References Available Upon Request

APPENDIX E

SAMPLE CONTRACT

PROFESSIONAL SERVICE AGREEMENT BETWEEN
JEFFERSON COUNTY, WI
AND
CARLSON DETTMANN CONSULTING, LLC

This professional service agreement (hereinafter the "Agreement") is made and entered into by and between Jefferson County, WI (hereinafter "County") and Carlson Dettmann Consulting, LLC (hereinafter "Consultant").

WHEREAS, the pay plan covering the County's full-time and regular part-time workforce, excluding sworn unionized law enforcement, includes some 240 job classifications and multiple pay plans covering over 400 employees and has not been audited in over ten years for substantial job changes or changes in competitive market conditions; and

WHEREAS, the Wisconsin Legislature substantially revised the labor relations statutes enabling the County to review and establish classifications, compensation and related matters for the County's non-protective service unionized employees in a manner that is in the best interests of the County; and

WHEREAS, the County wishes to enter into an agreement with Consultant to provide professional consulting services for a comprehensive assessment of the County's current classification/compensation program for all full-time and regular part-time staff as well as a market analysis for wages in comparable jobs in the County's competitive market and design a new salary plan; and

WHEREAS, the County has been a client of Consultant at various times over the years, including current on-going assistance with job classification reviews, and Client is familiar with the organizational structure of the County; and

WHEREAS, the Consultant is willing to provide the above-referenced professional consulting services to the County.

THEREFORE, the County and Consultant agree to the following:

1. Term. The term of this Agreement shall be from June 1, 2012 until all services are completed.

2. Scope of Services. The Consultant shall provide to the County consulting services as follows:

   a) Review and analyze relevant organizational values and concerns. Determine current organizational needs in regards to a classification and compensation system.

   b) Conduct project orientation sessions for all staff to explain the scope of the project, our methods, and each employee's role.

   c) Assist the County in developing a total compensation measurement method that will support the strategic management of its pay plans.

d) Document position responsibilities for all staff.

e) Apply Consultant's Point Factor Job Evaluation system to all positions to balance internal relationships with market factors.

f) Determine desired total compensation policy; i.e., the appropriate relationship between pay and benefits, the appropriate market(s), and the County's intended target for pay practices in relation to the market.

g) Supervise marketplace research conducted by County's Human Resources staff to determine appropriate competitive compensation (base pay) relationships so the County can successfully recruit/retain highly qualified employees.

h) Comment on the quality and cost of the benefit program and recommend modifications that seem warranted by the County's total compensation philosophy.

i) Design pay range options that are consistent with the County's pay policy and reflect appropriate pay practices for public sector employees at these levels.

j) Recommend allocations of each position to an appropriate pay grade based on appropriate internal equity and marketplace considerations. (To the extent that wages are bargained collectively, these are intended to guide future negotiations.)

k) Discuss with County leadership the issue of pay progression with appropriate consideration for both length of service and performance. Make recommendations based on the identified pay philosophy, feasibility and affordability.

l) Review supporting pay administration policies, including overtime pay status concerns.

m) Review the current process for internal maintenance of the classification and compensation system, making recommendations as appropriate.

n) Conduct classification appeals following adoption of a new plan by Client. Appeals must be submitted within 30 days of plan adoption.

o) Review and make appropriate recommendations for enhancements to the County's performance management system.

3. Report. Consultant will submit findings and recommendations on or about October 1, with a full report to follow the County's opportunity to review and comment, followed by a full presentation to the County Board of Supervisors.

4. Fees. The professional fee for this project shall be $55,000 inclusive of all expenses. The County shall pay Consultant in five installments: $11,000 on commencement of the project, and $11,000 in second, third, and fourth months of the project, and a final installment of $11,000 upon receipt of draft findings and recommendations.

5. Performance Requirements of Consultant. The Consultant shall complete the services as stated above. The Consultant shall furnish all labor, materials,

administration, services, supplies, equipment, transportation, and quality control necessary to provide professional consulting services. Consultant shall provide a progress reports upon request by the County.

6. Performance Requirements of County. The County shall provide and make available to the Consultant access to its human resources and related systems of record as necessary to fulfill said services.

7. Independent Contractor. It is mutually understood and agreed, and it is the intent of the parties hereto, that an independent contractor relationship be and is hereby established under the terms and conditions of this Agreement. The Consultant shall remain an independent contractor under this Agreement. All employees of Consultant or subcontractors shall remain the responsibility of the Consultant and shall not become employees of the County under this Agreement. No tenure or any rights or benefits, including worker's compensation, unemployment insurance, medical care, sick leave, vacation leave, severance pay, withholding taxes or other benefits available to County employees shall accrue to the Consultant or its employees performing services under this Agreement.

8. Indemnification. The Consultant agrees it shall defend, indemnify, and hold harmless the County, its officers, and its employees against any and all liability, losses, costs, damages, and expenses, including attorney fees that the County, its officers or its employees, may hereafter sustain, incur or be required to pay arising out of the negligent or intentional acts or omissions of the Consultant, its officers or employees. The County agrees it shall defend, indemnify, and hold harmless the Consultant, its officers, and its employees against any and all liability, losses, costs, damages, and expenses, including attorney fees that the Consultant, its officers or its employees, may hereafter sustain, incur or be required to pay arising out of the negligent or intentional acts or omissions of the County, its officers or employees.

9. Applicable Law. This Agreement shall be governed by and construed in accordance with the laws of the State of Wisconsin in effect on the date of this Agreement.

10. Assignment. Neither party to this Agreement may assign or transfer this Agreement, or any part thereof, without the written consent of the other party.

11. Severability. If any provision of this Agreement is held to be illegal, invalid or unenforceable, such provision shall be fully severable and this Agreement shall be construed and enforced as if such illegal, invalid or unenforceable provision had never comprised a part of the Agreement. The remaining provisions shall remain in full force and effect and shall not be affected by the illegal, invalid or unenforceable provision or by its severance.

12. Binding Effect. This Agreement shall extend to and be binding upon and inure to the benefit of the parties.

13. Entire Agreement. This Agreement sets forth the entire understanding of the parties and supersedes all prior arrangements and/or understandings, whether written or oral, with respect to the subject matter contained in this Agreement. No terms, conditions, warranties, other than those contained herein, and no amendments or modifications hereto shall be binding unless made in writing and signed by the County and the Consultant.

JEFFERSON COUNTY, WI

By:

_____

Date:

CARLSON CONSULTING, LLC

By:

_____

Charles E. Carlson

Date:

THE WATERS CONSULTING GROUP, INC.

Jefferson County, Wisconsin

Proposal Response to 2012 Classification and Compensation Study and Analysis

May 15, 2012

The Waters Consulting Group, Inc.
5050 Quorum Drive, Suite 625
Dallas, Texas 75254
Phone 800.899.1669
Fax 972.481.1951
www.watersconsulting.com

THE WATERS CONSULTING GROUP, INC.

May 15, 2012

Terri M. Palm, Human Resources Director
Jefferson County Courthouse
320 S. Main St.
Jefferson, WI 53549

Re: Proposal for Classification and Compensation Study

Dear Terri:

Thank you for the opportunity to submit this proposal describing our approach in assisting Jefferson County with its classification and compensation study. Based on the County's RFP, The Waters Consulting Group, Inc. (WCG) has developed a customized work plan that meets the scope of services, as noted. This work plan is committed to ensuring a fair, accountable, credible, and systematic approach to the development of a classification and compensation plan that attracts and retains qualified workers who will be paid equitable salaries; provides fair salaries for all workers, including the ability to recognize job performance as part of the pay plan; enables the County to maintain a competitive position with other comparable counties within the same geographic area; provides a compensation plan that is easy to understand and administer; and establishes practices and policies to meet the aforementioned objectives in future years.

To that end, the County seeks the assistance of a qualified firm to conduct a comprehensive classification and compensation study of all positions (excluding represented law enforcement), which is inclusive of a job evaluation process to ensure internal equity; comprehensive analysis of available salary survey data; the development of wage scales for each position; and recommendations regarding compensation best practices (including a discussion of performance management, as well as an anticipated cost proposal for the development of a performance appraisal plan). WCG has provided the following summary of our proposed technical approach, and would be pleased to further collaborate with the County to modify it, as required.

Project Planning and Administration: Identify underlying issues and challenges, agree upon project responsibilities, deliverables, and schedule.

Employee and Management Communication Sessions: Communicate with identified stakeholder groups the basic project methodology and deliverables. Identify other available opportunities for meaningful communication and involvement.

Develop and Implement a Job Evaluation System: Provide a comprehensive evaluation of Couunty jobs based on core content, minimum qualifications, and the actual responsibilities of the position (as described in the questionnaires collected from employees).

Salary, Benefits, and Pay Practices Survey: Develop and distribute a custom salary, benefits, and pay policies survey. Compile and analyze respondent information.

Design of Updated Compensation Structure and Incremental Implementation Cost Scenarios: Create new base compensation structures, inclusive of geographic market differentials (as appropriate) and provide implementation cost scenarios.

Final Report: Document the project methodology and findings, and provide training for utilization and continued maintenance of the compensation system.

Post-Implementation Support: Ongoing assistance with maintenance of the new system, including addition of new positions to the compensation plans; review of existing positions due to reorganizations, changes in essential functions, etc.; and an update of salary survey data to determine movement in relation to the newly-developed salary structures and updates to the structures at the end of the first year following implementation.

While our proposed methodology is based on industry best practices and has been successfully implemented in public organizations across the United States, including those of a similar size and complexity to Jefferson County, we understand the importance of thoughtfully and carefully considering the culture, climate, and strengths of our clients and would enthusiastically partner with the identified stakeholders in the completion of our analysis.

Successfully completing a project of this nature involves much more than providing the County's anticipated deliverables in a timely manner. Much of the outcome lies in the relationships we build with the identified stakeholders, designated staff, and the full confidence of everyone in the results and recommendations. This can only come from a highly-qualified team that consistently delivers results. I am confident that, upon review of our client list, letters of recommendation, and speaking with our references, you will see that we can be that partner for Jefferson County.

If you have any questions regarding the enclosed proposal, please contact me at (214) 466-2443, my direct line, or by email at tlcox@watersconsulting.com. I am authorized to commit the firm and will serve as the official contact person regarding all matters concerning this proposal.

We look forward to meeting with the Evaluation Committee to present our experience and qualifications in person.

Sincerely,

TL Cox
Director of Consulting Services

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SECTION A – INTRODUCTION

OFFICE LOCATION

Name: The Waters Consulting Group, Inc.

Location: 5050 Quorum Drive, Suite 625, Dallas, Texas 75254

Phone: (972) 481-1950 **Facsimile:** (972) 481-1951

Website: www.watersconsulting.com

Additional Offices: Austin, TX; Cleveland, OH; and Denver, CO

POINT OF CONTACT FOR RFP CORRESPONDENCE

Name: TL Cox

Title: Director of Consulting Services

Phone: (214) 466-2443 **Mobile:** (214) 601-7170

Fax: (972) 481-1951 **E-Mail:** tlcox@watersconsulting.com

PRINCIPAL

President and Founder, Rollie O. Waters, is viewed on a national level as one of the foremost authorities in compensation and performance management system design for the public sector. He has spoken before such organizations as the American Management Association, Southern Methodist University, the University of Maryland, California Institute of Technology, the Texas Municipal League (TML), the International Personnel Management Association (IPMA-HR), several international companies based in Great Britain, and various U.S. public sector agencies and organizations.

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SECTION B – EXPERIENCE AND QUALIFICATIONS

BRIEF DESCRIPTION OF THE ORGANIZATION

The Waters Consulting Group, Inc. (WCG) is a Dallas-based management consulting firm specializing in compensation, classification, job analysis, job evaluation, performance management, organizational analysis, succession planning, Human Resource audits, and executive search consulting. With more than 30 years of experience, WCG has emerged as a leader in evaluating, designing, and installing state-of-the-art compensation and human resource systems. We have experience in all areas of human resources in both the public and private sectors.

The firm was founded in 1976 under the name of Waters, Trego, and Davis and was incorporated in 1988 in Texas under the name of The Waters Consulting Group, Inc. WCG has approximately 15 employees.

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EXPERIENCE AND QUALIFICATIONS OF PROPOSED STAFF MEMBERS

WCG uses a project team approach for providing classification and compensation services. This allows us to effectively and efficiently manage workloads and assign different members of our consulting staff to project phases in accordance with their related professional experience. The following is a brief biography for each team member specializing in HR consulting.

Ruth Ann Eledge, SPHR
Vice President and Senior Consultant

Ruth Ann Eledge started working with WCG in 2000 and is the Vice President of the Consulting Services Division. In this role, she leads and oversees many of our HR studies and compensation projects and works closely with the entire consulting team to ensure on-time delivery while meeting the quality requirements of our clients.

Ruth Ann has more than 24 years of public sector experience with the City of Austin, Texas. Before joining the WCG team in 2000, she served as the City's Director of Human Resources and Civil Service. Under Ruth Ann's leadership, the City of Austin received an A+ rating from Governing Magazine for having a top Human Resource Department in 2000, an honor given only to two cities nationwide. Ruth Ann has worked closely with and supported various boards and commissions for the City of Austin, Texas, including the Civil Service Commission, Human Rights Commission, Mayor's Committee for Person's with Disabilities, and the City Council Affirmative Action Subcommittee.

AREAS OF EXPERTISE

- Total Compensation and Classification System Design and Development
- Position Description Analysis
- Point Factor Job Evaluation System Design and Installation
- Market Surveys and Analysis
- Benefits Surveys and Reporting
- Salary Administration Audits
- Employee Opinion Surveys
- Compensation Philosophy Design
- FLSA Analysis
- EEO Analysis
- Expert Witness Services in the area of compensation and classification for municipalities

PROFESSIONAL ACCOMPLISHMENTS AND EDUCATION

Ruth Ann received her master's degree (MPA) from Southwest Texas State University and her bachelor's degree from the University of Texas at Austin.

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TL COX
Director of Consulting Services

TL Cox serves as Director of Consulting Services for WCG's Consulting Services Division since 2008. In this role, he assists in developing custom human resources and compensation-related programs to meet our client's strategic goals and philosophies. Before joining WCG's consulting team, TL worked in program management in the aerospace industry, where he was responsible for client services, procurement and supplier development, and budget/contractual oversight for both commercial and military customers. He also served independently for Tri-County Indian Nations Community Development Corporation, completing legislative analysis, research, and proposal writing assignments, ensuring his assigned tasks represented appropriately Tri-County's overall mission. Previously, TL was employed in Information Technology with the Chickasaw Nation Division of Commerce, and in training/curriculum development for telecommunications and consumer electronics clientele.

AREAS OF EXPERTISE

- Total Compensation and Classification System Design and Development
- Position Description Analysis
- Point Factor Job Evaluation System Design and Installation
- Market Surveys and Analysis
- Benefits Surveys and Reporting
- Job Description and Job Family Development
- Employee Training and Orientation
- Organizational Analysis

PROFESSIONAL ACCOMPLISHMENTS AND EDUCATION

TL attended Southeastern Oklahoma State University in Durant, Oklahoma, earning a bachelor's degree (summa cum laude) in political science and communication, and the University of Texas at Arlington, where he completed a Master's of Public Administration.

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JOYCE C. POWELL, CCP
Senior Consultant

Joyce C. Powell serves as a Senior Consultant in HR and compensation systems with WCG since 2004. In this role, she assists in developing custom compensation programs to meet our client's strategic goals and philosophy. Joyce is a certified compensation professional with more than 15 years of hands-on experience. Before joining the WCG team in 2004, she served as an independent consultant working for private and public sector organizations in a variety of industries including
energy and oil, healthcare, information services, defense, insurance, transportation, and education. Prior to consulting, she also served as the Supervisor of Compensation and Human Resources for a subsidiary of a Fortune 500 company.
Joyce also has extensive experience in developing affirmative action plans and conducting custom HR analysis studies. She also is experienced at conducting HR system reviews, FLSA reviews, compensation reviews, market analyses, and internal equity studies.

AREAS OF EXPERTISE

- Compensation Market Surveys and Competitive Analysis
- HR Legal Compliance (EEO/Affirmative Action Analysis, Workforce Availability/Utilization Analysis, FLSA Reviews, and Public Utility Commission Reports on Workforce Diversity and Historically Underutilized Businesses)
- Job Analysis and Classification Review
- Point Factor Job Evaluation System Design and Implementation
- Job Information Questionnaire and Job Classification Survey Development
- Job Description and Job Family Development
- Compensation Structure Development and Implementation
- Internal Equity Studies
- Performance Evaluation System Development
- Compensation Department and Salary Administration Reviews
- HR Policies and Procedures
- Salary Administration Guidelines
- Incentive and Alternative Pay Program Design

PROFESSIONAL ACCOMPLISHMENTS AND EDUCATION

Joyce attended West Texas A&M University in Canyon, Texas. She is a Certified Compensation Professional (CCP) through WorldatWork (formerly the American Compensation Association).

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STRENGTHS IN THE MARKET PLACE

WCG has worked closely with public sector organizations across the U.S. to provide solutions tailored to their needs and specific climates. The WCG HR Consulting team is composed of members that have a wide range of experience, in both the private and public sectors, and knowledge of laws and regulations covering public employees. The sample client list below highlights some of the organizations for whom WCG has provided compensation consulting services over the past few years. Additional information is available upon request.

2008:

- Bandera County, Texas – Compensation Study
- Charlotte Housing Authority (Charlotte, North Carolina) – Comprehensive Compensation and Classification Study and Development of Job Descriptions
- Cities of West University Place and Bellaire – Compensation Study and Development of Job Descriptions
- City of Flagstaff, Arizona – Compensation Study
- City of Goodyear, Arizona – Comprehensive Compensation and Classification Study
- City of Lancaster, Texas – Comprehensive Compensation and Classification Study
- City of Lynnwood, Washington – Comprehensive Compensation and Classification Study
- City of Missouri City, Texas – Market Update
- Comal County, Texas – Market Update
- Corpus Christi Regional Transit Authority – Comprehensive Compensation and Classification Study
- Liberty County, Texas – Compensation Study
- North Carolina League of Municipalities – Comprehensive Compensation and Classification Study and Development of Job Descriptions
- Sacramento Regional Transit District – Comprehensive Compensation and Classification Study and Development of Job Descriptions
- Superior Court, Yuma County, Arizona – Compensation Study
- Village of Glenview, Illinois – Market Update

2009:

- City of Fountain, Colorado – Comprehensive Compensation and Classification Study
- City of Liberty, Texas – Comprehensive Compensation and Classification Study
- City of Missouri City, Texas – Market Update
- City of Mont Belvieu, Texas – Comprehensive Compensation and Classification Study
- City of Oklahoma City, Oklahoma – Comprehensive Compensation and Classification Study and Development of Job Descriptions
- City of Tyler, Texas – Comprehensive Compensation and Classification Study
- City of West University Place – Market Update
- Jefferson County, Colorado – Comprehensive Compensation and Classification Study and Development of Job Descriptions
- Lamar University (Beaumont, Texas) Comprehensive Compensation and Classification Study and Development of Job Descriptions
- Northeast Community College – Comprehensive Compensation and Classification Study and Development of Job Descriptions
- Terrebonne Parish, Louisiana – Comprehensive Compensation and Classification Study
- Texas Municipal Power Agency (Bryan, Texas) – Comprehensive Compensation and Classification Study

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- Village of Glenview, Illinois – Market Update

2010:

- City of Greenville, North Carolina – Comprehensive Compensation and Classification Study and Development of Job Descriptions
- City of Lynnwood Washington – Comprehensive Compensation and Classification Study
- City of San Marcos, California – Comprehensive Compensation and Classification Study and Development of Job Descriptions
- City of Thornton, Colorado – Compensation Study
- City of West University Place, Texas – Market Update
- City of Wheat Ridge, Colorado – Compensation Study
- Comal County, Texas – Compensation Study
- Kansas City, Kansas Housing Authority – Comprehensive Compensation and Classification Study and Development of Job Descriptions
- Northeast Community College – Expanded Benefits Study
- Pointe Coupee Parish, Louisiana – Comprehensive Compensation and Classification Study
- Tarrant County 9-1-1, Texas – Market Study
- Village of Winnetka, Illinois – Compensation, Benefits, and Pay Practices Study

2011:

- City of Charlotte, North Carolina – Information Technology Classification Study
- City of Crowley, Texas – Classification and Compensation Study
- City of Farmers Branch, Texas - Comprehensive Compensation and Classification Study
- City of Greenville, South Carolina – Comprehensive Classification and Compensation Study
- City of Morgantown, West Virginia – Compensation Study
- City of Overland Park, Kansas – Compensation Study
- City of Portland, Texas – Comprehensive Classification and Compensation Study
- City of Simpsonville, South Carolina – Comprehensive Compensation Study (Fire Department only) and Development of Job Descriptions
- City of Sugar Land, Texas – Compensation Survey
- City of Thibodaux, Louisiana – Comprehensive Compensation and Classification Study and Development of Job Descriptions
- City of Upper Arlington, Ohio – Comprehensive Compensation Study
- Fire and Police Pension Association of Colorado – Compensation Study
- Gillespie County, Texas - Compensation Study
- Greenville Utilities Commission, North Carolina – Strategic Plan for the Human Resources Department
- Guadalupe Brazos River Authority – Compensation Study
- Harford Community College, Maryland – Job Classification Analysis Study and Development of Job Descriptions
- Jacksonville Port Authority (JAXPORT), Florida – Job Evaluation and Compensation Assessment Study
- Montrose County, Colorado – Classification and Compensation Study
- Orange Water and Sewer District, North Carolina – Employee Classification and Compensation Study
- San Miguel Electric Cooperative – Compensation Study
- Toho Water Corporation, Florida – Technical Salary Survey
- Village of Glenview, Illinois – Market Update

Our strength in the market is perhaps best demonstrated by the following letters of recommendation attesting to the quality and timeliness of our work.

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The City of
OKLAHOMA CITY
Personnel Department

April 6, 2011

To whom it may concern:

In my capacity as the Assistant Personnel Director for the City of Oklahoma City, I was responsible for primary oversight of the consulting contract between the City and Waters Consulting Group (WCG). The City contracted with WCG to conduct a comprehensive classification, compensation and benefits study. Specifically, WCG was charged with making recommendations regarding existing classification and compensation systems, EEO-4 job categories, job evaluation methodology, career progression, FLSA designations, optimum staffing to maintain the classification and compensation structures, etc., as well as alternative concepts such as pay-for-performance, broadbanding, total compensation, skill-based pay, and/or other options that would benefit the City of Oklahoma City.

Ruth Ann Eledge was the lead consultant assigned to our contract. She, along with Joyce Powell and T. L. Cox, impressed us with their attention to the contract details and commitment to provide all the services promised. They completed their work according to the agreed upon timeline, delivering all aspects of the project as promised, and were within their budget. We are contemplating implementation of the first phase of the WCG recommendations and Ms. Eledge continues to follow up and make WCG's staff available for any issues that may arise as we move forward.

WCG employs highly competent and professional employees, I would recommend them for consideration to others who may be contemplating conducting a comprehensive classification, compensation, and benefits study.

Very truly yours,

Monica L. Coleman

Monica L. Coleman
Assistant Personnel Director

420 West Main, Suite 110 • Oklahoma City, Oklahoma 73102 • 405/297-2530 • 405/297-2090

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LAMAR UNIVERSITY
A Member of The Texas State University System

March 3, 2010

Stacy Waters
The Waters Consulting Group, Inc.
5050 Quorum Drive, Suite 625
Dallas, Texas 75254

Dear Ms. Waters:

As we are nearing the completion of the Comprehensive Compensation and Classification Study for Lamar University, I want to thank you for the outstanding work conducted by your team of consultants. WCG has delivered on every aspect of the project and I am pleased with the study and recommendations. WCG has produced a plan that is well documented and easily maintained in the future.

I want to recognize the team of professionals you assigned to the project. From the onset of the project, TL Cox and Linda Ray conducted a series of employee briefings which gained employee support for the project. Veronyka Flores conducted follow-up interviews with employees and managers. She also evaluated the FLSA status of some questionable jobs. Joyce Powell's compensation analysis is right on target. Joyce has a knack for taking something complicated and making it look simple. Finally, I can't say enough about Ruth Ann Eledge's leadership on this project. She is clearly an expert in classification, compensation, and communication. She conducted executive and management briefings, trained the Job Evaluation Team, and worked closely with the HR staff to deliver the comprehensive study. Ruth Ann kept the project on track and moving forward. The WCG team preformed each task with the highest level of professionalism and expertise.

It has been a pleasure working with the Waters Consulting Group. I am confident we selected the right firm when we selected WCG. Thank you for working with us on this important project. I would recommend WCG to any organization seeking expert consulting in the future.

Warmest Regards,

Annette F. Thompson, PHR
Associate Vice President
Human Resources

Human Resources Department
P. O. Box 11127 Beaumont, Texas 77710 409 880-8375

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TOWN OF MARANA
ADMINISTRATIVE SERVICES

April 6, 2011

Reference: Waters Consulting Group – Letter of Recommendation

To Whom It May Concern:

It's my pleasure to write this letter of recommendation on behalf of The Waters Consulting Group, Inc. While working for the City of Tucson in my capacity as Deputy Director of Human Resources I had opportunity to work directly with Rollie Waters and Ruth Ann Eledge over an 18 month period. The City desired to move to a more objective means of job evaluation and to reduce and simplify its compensation structure. The workforce then consisted of 5,500+ employees and the compensation plan contained 7 structures as follows:

- ***Pay-for-Performance*** – Open ranges with a minimum and maximum salary (no steps) for exempt professional employees.
- ***Administrative/Professional/Technical/Clerical*** – Structured ranges with steps (5% / 2.5% step differentials) primarily for non-exempt white-collar and non-exempt supervisory personnel.
- ***Commissioned Fire*** – Structured ranges with steps (5% / 2.5% step differentials) for non-exempt commissioned fire personnel through the rank of Fire Captain.
- ***Commissioned Police*** – Structured ranges with steps (5% / 2.5% step differentials) for non-exempt commissioned police personnel through the rank of Police Sergeant.
- ***Labor/Trades*** – Structured ranges with steps (5% / 2.5% step differentials) for non-exempt, non-supervisory blue-collar personnel.
- ***Hourly*** – Flat rate hourly rate for intermittent and seasonal hourly personnel (non-permanent work force).
- ***Golf*** –Base rate and flexible compensation schedule from income generated by conducting golf lessons. The schedule contained two structured ranges and two PFP ranges.

The structures proved unwieldy and the City was looking for a more objective solution to evaluate jobs and apply annual compensation adjustments. The Waters Consulting Group was

11555 W. CIVIC CENTER DRIVE, BLDG. A3 ■ MARANA, ARIZONA 85653-7006 ■ TELEPHONE: (520) 382-1900 ■ FAX: 382-1902

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asked to conduct a comprehensive compensation study that included the development and completion of several objectives including:

- A formalized compensation philosophy which identified target markets and supported desired position in relation to the target markets
- A formalized methodology to establish and maintain the classification structure
- A standardized instrument to demonstrate job specifications which were legally compliant and included realistic and updated minimum qualifications
- A comprehensive market review to establish the desired relationship with market data and determined the competitiveness of benefits offerings
- An audit of the City's compliance with federal regulations in both policy and practice
- An implementation plan for effectively transitioning into the proposed compensation system, including identification of impact on employee pay, communication of the new system, and management of the established appeals process, and,
- Training of staff to ensure future maintenance, sustainability and a strong understanding of all program components

The study consisted of several components described below. Communication with the elected officials and employees was of paramount importance for the City.

Project Communication Meetings with Oversight Team: *Conducted throughout the project*
Employee Communication Sessions for all Employees: *Fourteen days*
Interviews with Incumbents During Classification Analysis (500 interviews): *Twenty-one days*
Communication with Supervisors and Managers: F*ive days*
Communication Sessions with Mayor and City Council: *Conducted throughout the project*
One-on-One Sessions with Mayor and Council Representatives: *Conducted throughout the project*
Classification Description Development for approximately 500 job titles: N*inety days*
Job Evaluation System Development and Implementation: *Ninety days*
Salary and Benefits Survey with Findings and Recommendations: *Ninety days*
FLSA Audit and Review of Compliance: S*ixty days*
Compensation and Pay Structure Development & Budget: *Ninety days*
Appeals Process Development and Facilitation : *Ninety days*
Training for Human Resources Staff on New System: *Five days*
Final Report, Recommendations and Guidelines: *Thirty days*

As a result of this project, the City converted an unwieldy, subjective compensation system and methodology for job evaluation methodology to a more objective system. This had the effect of reducing employee disputes (an annual process allowed the by City Charter) and cut down the cumbersome task of annually gathering benchmark data for specific jobs. The outcome of this project was viewed as extremely successful and the systems remain in place today. Of equal success was our relationship with our consultant team. They proved to be timely, responsive, on task, and developed a positive rapport with City HR staff, the City's management team and the Mayor and Council.

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Please feel free to contact me to discuss this project in more detail. I can be reached by e-mail at smachain@marana.com or by telephone at 520-382-1920.

Best Regards,

Suzanne Machain
Human Resources Director
Town of Marana, Arizona

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CITY OF TUCSON
OFFICE OF THE CITY MANAGER

April 6, 2011

To Whom It May Concern:

In 2001, The Waters Consulting Group (WCG) was engaged by the City of Tucson to perform a comprehensive study of the City's current classification and compensation program. Because of the need to identify funding levels for budgeting purposes, the project was divided into two phases. Efforts in the first phase focused on measuring the competitive position of the City of Tucson's current pay practices relative to the labor market. The second phase of the project concentrated on identifying and evaluating the internal value of positions within the City, using WCG's proprietary Job Evaluation System, and major revisions to the current pay structure and classification system.

WCG performed in a professional manner offering suggestions and alternatives based on their collective knowledge of "best practices". They worked well with our four unions and various employees groups throughout the process and helped to commutate the system to these stakeholders as well as elected officials. The study was thorough and complete and the City of Tucson was very satisfied with the process and the timely, professional work product delivered by the Waters Team. The new classification and Compensation Plan was a "paradigm shift" for the City and the first comprehensive pay plan in our history.

Ruth Ann Eledge and staff were consistently on track with the project and available to answer questions on all levels. We truly enjoyed working with the professional staff and highly recommend them.

If you have any specific questions please do not hesitate to call me. I can be reached at 520-791-4204.

Sincerely,

Mike Letcher
City Manager

CITY HALL • 255 W. ALAMEDA • P.O. BOX 27210 • TUCSON, AZ 85726-7210
(520) 791-4204 • FAX (520) 791-5198 • TTY (520) 791-2639
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PROFESSIONAL REFERENCES

Jefferson County, Colorado
100 Jefferson County Parkway
Golden, Colorado 80401
(520) 488-4206
pmaher922@comcast.net
PAT MAHER, FORMER DIRECTOR OF HUMAN RESOURCES

Project: Design and installation of Comprehensive Compensation and Classification Study for all employees. Conduct comprehensive salary survey of appropriate public and private sector. Develop a pay and classification plan, job evaluation method.

Comal County, Texas
150 N. Seguin
New Braunfels, TX 78130
(830)643-5859
Mr. Robert Grazioli, Director, Human Resources
hrsrjg@co.comal.tx.us

Project: Job Evaluation and Market Survey

Montrose County, CO
1845 S. Townsend Avenue
Montrose, CO
970-252-5046
chuffman@montrosecounty.net
Mr. Chad Huffman, Human Resources Director

Project: Comprehensive Classification and Compensation Study and Development of a Compensation Philosophy.

Kansas City Housing Authority, Kansas City, Kansas
124 North 9th Street
Kansas City, Kansas 66101
(913) 279-3431
jRandle@kckha.org
MS. JACKIE RANDAL, EXECUTIVE SERVICES MANAGER

*Project: D*evelopment of job descriptions, pay comparability study, a job evaluation and compensation system including a wage and salary analysis.

City of Greenville/Greenville Utilities Commission, North Carolina

Greenville Utilities Commission
P.O. Box 1847
Greenville, NC 28783-1847
(252) 551-1574
MR. TONY CANNON, GENERAL MANAGER/CEO
cannont@guc.com

City of Greenville, NC
200 West Fifth Street
Greenville, NC 28734
(252)329-4432
MR. THOM MOTON, ACTING CITY MANAGER
tmoton@greenvillenc.gov

Project: Comprehensive Classification and Compensation Study with approximately 1200 employees in 414 classified and non-classified positions. Develop Strategic Plan for Greenville Utilities Commission Human Resources Department.

City of San Marcos, California
1 Civic Center Drive, San Marcos, CA 92069
(760) 744-1050 X 3121

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DFrench@san-marcos.net
MS. DONNA FRENCH, HUMAN RESOURCES/RISK DIRECTOR

Project: Classification and Compensation Study, Job Description Development, Pay Practices Analysis.

Village of Glenview, Illinois
1225 Waukegan Road, Glenview, IL 60025
(847) 904-4370
THILEMAN@GLENVIEW.IL.US
MR. TODD HILEMAN, VILLAGE MANAGER

Project: Design and installation of Comprehensive Compensation and Classification Study for all employees Village-wide in a Bargaining Unit environment; Job Evaluation and Market Update; HR Audit.

Harford Community College, Bel Air, Maryland
401 Thomas Run Road
Bel Air, MD 21015
(443) 412-2416
CHickson@Harford.edu
Ms. Cheryl Hickson, Director for Human Resources and Employee Development

Project: Job Classification Analysis, Salary Survey, and Development of Job Descriptions.

City of Oklahoma City, Oklahoma
420 W. Main, Suite 110
Oklahoma City, OK 73012
(405) 297-2530
monica.coleman@okc.gov
MS. MONICA COLEMAN, ASSISTANT DIRECTOR OF HUMAN RESOURCES

Project: Comprehensive Compensation/Classification and Benefits Study for all employees citywide.

City of Thibodaux, Louisiana
310 West Second St.
P.O. Box 5418
Thibodaux, Louisiana 70302
(985) 448-5848
dclause@ci.thibodaux.la.us
MR. DONALD (DONNY) CLAUSE, HUMAN RESOURCES DIRECTOR

Project: Comprehensive Classification and Compensation Study and Development of Job Descriptions.

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The Waters Consulting Group, Inc. has included in the "Strengths in the Market Place" section a partial list of the organizations for whom classification and compensation services have been conducted (over 100 since 2005 alone). The following pages contain summaries that exemplify our firm's experience with similar projects:

Client: Jefferson County, Colorado

The Waters Consulting Group was asked to complete a comprehensive study, in an aggressive time frame, that included:

- Development of a customized point factor job evaluation system including modify wording of job evaluation factor level definitions to match the position description questionnaires the County has used to collect classification information.
- A review of the current broad band structure and determination, through point factor job evaluation, the actual number of class positions needed. This required the review of each position description questionnaire (2,800) and a through point factor analysis to create a reasonable distribution of jobs within grades based on compensable factor measurement, as opposed to whole job ranking (currently in use).
- Creation of a hierarchy of job grades based on the Point Factor Job Evaluation process for both non-exempt and exempt positions.
- Recommendation of an alternative job evaluation plans for County needs, (i.e., legal).
- Inclusion of the Sheriff's Office non-sworn positions and Library positions in the Job Evaluation process using current job descriptions.
- Verification of internal equity and completion of compensable factor scoring and the resulting job ranges. The resulting scores were validated with application of salary survey information that took into consideration external equity. Strong quality control procedures were established to assure accurate job matching as well as point factor evaluations.
- Completion of a comprehensive market survey including the identification of benchmark organizations and benchmark positions to be used in the salary survey.
- Compilation of private and public sector data from WCG sources and County survey sources for market comparisons only and not for structure development.
- Analysis of market data for each benchmark position by public sector, private sector and all data, with market comparisons based on acceptable compensation practices and County needs.
- Summarize market comparisons by employee group.
- Development of new base compensation plans and pay structures based on market survey and point factor job evaluation results to satisfy the County's needs with multiple pay structures for Non-Exempt, Exempt, Sworn, Executive, and others as required (District Attorney's Office).
- Development of an implementation plan that identifies any pay adjustments to proposed pay range minimum as well as other adjustments to address compression.
- Conduct FLSA reviews and provide documentation of results and WCG opinions
- Development of Salary Administration Policy Manual.
- Training for Human Resources staff on Job Evaluation process and maintenance of system.
- Completion of a Lilly Ledbetter Audit to determine impact of the study based on proposed structure
- Formalized appeals process to address point the factor Job Evaluation system.

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- Onsite meetings with Board of County Commissioners, County elected and appointed officials and County Administrator, as required.

Client: <u>The City of Greenville and the Greenville Utilities Commission</u>

The City of Greenville and the Greenville Utilities Commission are two separate entities and operate as two separate organizations. The Greenville Utilities is owned by the citizens of Greenville, but operates under a separate charter issued by the North Carolina General Assembly. The two organizations are connected through a formal agreement that establishes the relationship and their governing boards meet jointly as needed to discuss common issues. The City Manager is a member of the Commission's eight-member Board and the City Council approves all Board members. This joint project to conduct a comprehensive compensation study was funded by both entities and has included approximately 1200 employees in over 350 job titles. The challenge in this project has been to work with both governing boards to meet their respective needs and maintain the desired consistency in their proposed systems. The following components are included in the scope of the project:

- A formalized compensation philosophy which identifies target markets and supports desired position in relation to the target markets.
- A formalized methodology to establish and maintain classification structure.
- Extensive analysis of job documentation to ensure a classification system that is consistently applied across both organizations and provides internal equity in job titling.
- A standardized instrument to demonstrate job specifications which are legally compliant and include realistic and updated minimum qualifications.
- A comprehensive market review to establish the desired relationship with market data and determine the competiveness of benefits offerings.
- An in-depth review of total compensation to both public and private sector, calculating the value of benefits offerings, base compensation, and total compensation. Extensive analysis was completed to calculate the individual offering monetary value and total compensation.
- An audit of the City's compliance with federal regulations in both policy and practice.
- An implementation plan for effectively transitioning into the proposed compensation system, including identification of impact on employee pay, communication of the new system, and management of the established appeals process.
- Facilitation of multiple joint meetings of the Board and Council for the two organizations to establish policy and direction for the project.
- A comprehensive communication plan that provides a series of communications to all managers, supervisors, and employees.
- Training of staff to ensure future maintenance, sustainability and a strong understanding of all program components.

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SECTION C – APPROACH/METHODS USED TO PERFORM THE PROJECT

RESPONSE TO SCOPE OF SERVICES

As noted in the RFP – the County is seeking the assistance of a qualified partner to conduct a classification and compensation study that includes a detailed job analysis and evaluation; a comprehensive review of internal equity and external competitiveness; and guidelines and tools for ongoing maintenance.

WCG has worked extensively with public sector organizations, including those of a similar size and complexity to Jefferson County, and has proposed a work plan and corresponding professional fee structure that meets the Scope of Services, as noted. Our customized approach shall include an examination of the County's overall classification and compensation methodologies; a review of the individual components (i.e. the market data sources, survey instrument, benchmark positions, etc.) and their relationship to one another; meetings with key stakeholders (such as the County's Leadership and employees); and implementation support. The response that follows represents WCG's understanding of the deliverables to be provided and may be further refined to best suit the needs of the County.

Project Planning and Administration

The initial phase of the work plan includes time for in-depth, on-site strategy meetings with the County in addition to necessary time to support the ongoing administration of the project. During the project planning phase, WCG's Project Manager(s) and the County's Project Team will meet to discuss the objectives and Scope of Services outlined in the RFP. It has been our experience that, during this process, our clients can more fully elaborate on the underlying challenges prompting the study, which may lead to a discussion of alternate or optional methodologies. WCG will be prepared to facilitate at the "kick off" meeting a review of the initial project budget to ensure it addresses both the stated and unstated needs of the County in a thoughtful and cost effective manner. It is anticipated that this meeting will take place over a one day period and will begin with the project-planning phase and will end with an overview of all agreed upon project goals, forms, and timelines.

It is also WCG's practice to provide ongoing communications with our clients to identify critical project milestones and ensure the efficient delivery of services in support of the approved budget and schedule. WCG will hold (in addition to the on-site meetings discussed in this proposal) periodic status updates via GoToMeeting (i.e. a "teleconference").

This first phase also involves the collection of essential data, including:

- A comprehensive employee compensation download including date of hire, time in current job, current rate of pay, current direct and indirect benefit costs by employee, special pay allocations and other total compensation related data;
- Personnel rules and regulations;

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- Organizational charts;
- Job descriptions;
- Current Fair Labor Standards Act (FLSA) designation reports; and
- Other information, such as Equal Employment Opportunity (EEO) demographics, that is necessary to conduct a successful audit of your existing systems.

Upon receipt of this information, WCG will upload the County's existing compensation system(s) into our proprietary Web-based platform PayDesigner©, which will enable us to conduct an audit to identify the breadth and depth of any deficiencies. WCG will discuss the findings with the County, including those that will be addressed within the compensation study, and would be pleased to discuss any necessary amendments to the approved Scope of Services to address others uncovered during this assessment.

Once WCG's consulting team has an in-depth understanding of current methodologies and the goals of elected/appointed officials and the County's executive team, we will develop a compensation philosophy in conjunction with the County. This compensation philosophy will be reviewed and modified (as required). The compensation philosophy will provide guidance during the remainder of the study, including the purpose, goals, and objectives for the compensation program, market definition, and pay administration policy across all systems and will be treated as "work in progress" as needed changes are identified. If there is a need to work with appointed and elected officials to assist in adoption of this philosophy, either through formal action by a governing body or administrative direction, WCG will conduct workshops and/or facilitate meetings (these additional days onsite are priced as an optional/variable services and are not included in the base professional fee structure). One option that has proven successful in educating people of the challenges in classification/compensation system administration and the importance of a clearly articulated compensation philosophy is WCG's "Compensation 101" workshop. This popular session generally includes:

- Characteristics of an Effective Compensation Program
- Equity Issues in Wage and Salary Administration
- Number of Pay Structures
- Job Evaluation Types
- Point Factor Job Evaluation

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- Grading Jobs
- Labor Market Definition
- Benchmark Job Selection
- Market Analysis
- Plotting and Reviewing Survey Results
- Anatomy of a Pay Structure
- Sample Consumer Price Index Comparisons
- Advantages and Disadvantages of Various Pay Systems (Step, Merit, Performance-Based, etc.)
- Wage and Salary Administration
- New Trends in Compensation

Employee and Management Communication Sessions

Our experience has shown that it is critical to provide opportunities for meaningful participation by all employees in a project of this nature. Our approach involves making informative presentations to individuals at all levels within the organization. This helps manage expectations and ensure a consistent message about 1) what is included in the study, 2) the timeline, and 3) what the anticipated level of involvement is.

It is also during this time that we develop (with the County's input) and review (with employees and managers) the customized forms that they will be asked to complete in order to provide documentation of all County jobs.

The customized Job Description Questionnaire (JDQ) will be distributed and employees given an in-depth review regarding its accurate and full completion. The JDQ's provide information about each position in the County that may be utilized to ensure good matches to benchmark organizations' positions (the market study) and in the job evaluation process to determine the internal value of each job.

Managers/Supervisors will be asked to complete a Job Evaluation Manual (JEM) on each classification title under their supervision. This provides their view of the minimum requirements of the job (education and experience) and other job-related knowledge, skills, and abilities.

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During the communication sessions, WCG will also provide a **Toll Free telephone number** specifically for the County that will be used to collect and answer project-related questions and comments. In addition, a designated email address (**JeffersonCountyWI-Project@watersconsulting.com**) will be available for all employees, staff, and management as another form of communication.

We typically conduct separate sessions with supervisors and managers in order to provide a forum for discussion of specific issues they face. They will be given the opportunity to ask specific project-related questions, as well as questions that relate to their departments' needs and concerns. WCG has also included within the initial project budget the distribution, collection, and review of a Management Questionnaire designed to gather critical information directly from Department Heads and key management level positions, such as perceived internal equity issues, positions with excessive turnover or recruitment problems, and other classification and compensation challenges. We have found that this allows us to further tailor our approach to address classification and compensation inequities among the County's various workgroups.

As per the RFP, employee and management interviews may be conducted as needed. WCG anticipates that interviews with approximately 20% of job titles (45 interviews) would be sufficient in verifying information submitted in JDQs, addressing challenging classifications, including those with high turnover rates, those for which recruitment has been difficult, and those where clarification of minimum qualifications, knowledge, skills, and abilities is necessary. Multiple incumbents within a single job title may attend one interview, ensuring that a representative number of employees are given the opportunity to participate. Additionally, different job titles within a career family may attend "focus group" sessions to help clarify/confirm essential job functions, and to clearly delineate differences in job responsibilities. WCG is committed to addressing issues of importance to the County and will work with the Project Manager and Project Team to schedule the interviews necessary to accomplish the anticipated Scope of Services.

Develop and Implement a Job Evaluation System

As per the RFP, one of the County's objectives is to analyze, rank, and assign each job to the appropriate grade. WCG would recommend the development and implementation of a Point Factor Job Evaluation process to meet this objective. We will work with the County to determine the specific compensable factors (characteristics about jobs such as minimum qualifications and knowledge, skill, and ability requirements) and weights that will be used to establish the County's internal relationships. Compensable factors should be defensible, exist across departments, and be easily understood by employees. The following are priority validated factors that WCG will

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use during this process and customized to support the operating environment and organizational structure of the County.

- Formal Education
- Experience
- Management/Supervision
- Human Collaboration
- Freedom to Act
- Technical Skills
- Fiscal Responsibility
- Working Conditions

Based on information in the County's job descriptions and/or completed JDQ, WCG will enter the values for each compensable factor. This initial evaluation will be provided to the County's Project Manager for review and feedback. A Job Evaluation Team (JET), comprised of management-level employees, will be convened to review these draft scores and the initial placement of jobs within the new classification system. Once rating changes are entered, the final hierarchy will reflect both sound compensation practices and the County's collective organizational values. It is intended that this hierarchy will establish relative internal equity and that the compensation structure will be driven by market comparisons.

It is during this phase of the project that WCG conducts an FLSA audit to determine if positions are properly categorized as exempt or Non-Exempt. The County can request specific positions to be reviewed, and WCG will also identify positions based on the content of completed JDQ, and supplemental questionnaires (as required). Reports will be provided for those positions for which changes are recommended.

Salary, Benefits, and Pay Practices Survey

This phase of the project involves determining the pay opportunities of similar positions in selected organizations in the County's competitive market by collecting data from identified benchmark organizations, published surveys, and public employer compensation plans.

The validity of survey data is dependent on sound survey techniques surrounding the following essential areas:

- Benchmark jobs that are representative of all County departments, job levels and job families –WCG's innovative survey processes enable us to collect and analyze information on a variety of positions for comparative purposes. Additionally, because this project activity is accomplished by an experienced compensation professional on WCG's staff, the County can have full confidence in the accuracy of information presented.

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- **Method of Determining Quality Job Match**: WCG will develop (using the County's existing job descriptions and/or completed JDQ) job summaries, which ensure matches based on job content and minimum qualifications (as opposed to matching on job title alone). Each responding organization will be instructed to match positions based on this information. Matches and data provided by benchmark organizations will be reviewed to ensure appropriate matching and additional data, including job descriptions and organizational charts, are requested when necessary.

- Benchmark organizations that are representative of employers with whom the County competes for qualified employees.

- Relevant published private sector survey data as an alternative approach to collecting more data for comparison purposes. As with all data, each data point will be analyzed to determine if it should be used in the market comparison phase. If acceptable matches are determined, this could be an acceptable source of additional information to use in future market updates, which helps decrease the administrative burden of collecting customized market data.

WCG's professional compensation consultants will provide a report of the survey results, including charts and graphs comparing the County to survey participants. The report will have reports in a format of private and public separately and then combined, enabling the County to determine what data will be used in developing the salary structures. This detailed analysis will include, by survey job title, the participant matching titles, FLSA status, degree of match (to the County's job summary), full or part time status, number of incumbents, geographic (cost of labor) differentials, range minimum and maximum, as well as a number of statistical data points.

In addition to gathering direct pay data for benchmark positions, WCG will collect from comparable organizations benefit offerings such as medical/dental/vision contributions, life insurance, disability insurance, tuition assistance, and paid time off, as well as relevant pay practices. WCG will work closely with the Project Team in identifying the specific total compensation elements to be collected via custom and/or published surveys. One the responses have been compiled, WCG will make recommendations as to the general competitiveness of the County and identify areas for further consideration based on best/prevailing practices. This information is also important in working with the Project Team and County leadership in finalizing the appropriate competitive position relevant to the market data.

Design of Updated Compensation Structure(s)

After each surveyed job has been "priced "in the competitive market, WCG will develop salary structure(s) for all positions in the study. WCG will work with the County's Project Team to determine the appropriate number of pay structures based on the County's stated needs and objectives.

You will recall that, during the Project Planning and Administration Phase, WCG's professional consultants conduct an audit of the County's existing pay structure(s). It is during the design of new structures where the identified deficiencies will be addressed. Design considerations to be incorporated into the structure(s) include:

- Range spread (distance from minimum to maximum);

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- Midpoint progression (difference in midpoint from one range to the next);
- Integration of pay philosophies, market position, and the County's financial resources; and,
- Projecting potential growth, advancement, and recognition of performance through the pay structure(s).

Once the appropriate pay grade is established, an analysis of each employee's compa-ratio (relationship to current and proposed midpoints) will be completed to determine if acceptable range penetration has been achieved and to address through implementation scenarios any identified compression problems. Factors such as time in current position as well as an incumbent's performance may be included in this analysis when data is available. Using a standard set of criteria for evaluative purposes will assist in the identification of areas where internal salary relationships need attention. WCG will work with the County to identify solutions and estimated project budget impact in order to resolve identified inequities. For our initial budget projections, WCG has included time to prepare up to three implementation scenarios. The first will be the cost of bringing employees up to the proposed range minimum and the remaining may be used for time in position adjustments to address identified compression problems. WCG will provide in each implementation scenario extensive data on each employee, including:

- The employee's current job title, grade, and base salary;
- The exact position of each employee's job title, grade, and base salary in the proposed structure;
- The relationship of the employee's salary to the existing and proposed midpoint.

Job Descriptions

The information included in the customized JDQ and the final Job Evaluation scores can be used to develop comprehensive job descriptions for County positions that will include minimum education and experience requirements, essential job functions, knowledge, skills, abilities, working conditions, physical requirements, licenses and certifications, and other information required by the County. WCG will prepare draft job descriptions based on the completed JDQ and Job Evaluation scores, as well as guidelines for review of the completed job descriptions for accuracy. Because there is a detailed departmental review process before the completed JDQ are submitted to WCG, it has been our experience that the amount of feedback from Department managers is limited. Once any feedback is received, analyzed, and incorporated into the job descriptions (as appropriate), final job descriptions will be provided to the County.

Final Report

For the County to effectively maintain and administer the newly-created classification and compensation program, it is necessary to develop comprehensive administration guidelines. With this in mind, WCG will prepare a Final Report. The Final Report will include descriptions of the various project phases, contain relevant recommendations on adoption and implementation of the pay system, and will discuss ongoing administrative guidelines. This Report will also include an assessment or need for suggested changes based on our discussions, observations, and analysis throughout the project. The Final Report will:

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- Outline the methodology that was utilized in the study;
- Define the compensation policy and objectives; and
- Set forth procedures for maintaining the compensation system.

To address item L in the Scope of Services, the review of current compensation ordinances with recommended changes, WCG will work with the County in customizing this report, as well as the accompanying administrative guidelines, to ensure they meet the County's expectations regarding internal equity and external competitiveness, and that all recommendations are consistent with best practices. A detailed review and analysis of the County's ordinances and policies is not included, though it could be priced as an optional/variable service should the County anticipate that the successful firm will rewrite this manual. Upon completion of the Final Report, WCG will prepare a comprehensive presentation of the compensation study results that will be given at a meeting to be determined by the County's Project Manager.

Ongoing Support

For the initial 12 months following completion of the study, WCG will partner with the County in maintenance of the classification and compensation system. Our goal in offering extended support is to demonstrate our confidence in and commitment to the integrity of our product, and our strong desire to partner with the County on this most important project. This support includes the following.

- Addition of new positions in the classification plan;
- Review and assistance with the administrative placement of existing or new positions due to reorganizations, changes in essential functions, etc.;

Review and input of new salary survey data at the end of the 12 month period. WCG then will update the newly-developed compensation structure based on market data.

TIMELINE

CLASSIFICATION AND COMPENSATION STUDY TIMELINE												
Project Phases	**Weeks**											
	1	2	3	4	5	6	7	8	9	10	11	12
1. Project Planning and Administration.												
2. Employee and Management Communication Sessions.												
3. Develop and Implement a Job Evaluation System.												

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4. Comprehensive Salary, Benefits, and Pay Practices Survey.												
5. Design of Updated Compensation Structure.												
6. Final Report.												

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SECTION D – COST PROPOSAL

TOTAL PROFESSIONAL FEES
BASED ON APPROXIMATELY 400 EMPLOYEES IN 224 JOB TITLES

CLASSIFICATION AND COMPENSATION STUDY	PROFESSIONAL FEES
1. Project Planning and Administration, Including Development of a Compensation Philosophy.	7,500.00
2. Employee and Management Communication Sessions, Including Interviews/Focus Groups With Approximately 20% of the County's Job Titles (45, As Required).	12,000.00
3. Develop and Implement a Job Evaluation System, Including Required FLSA Reviews.	12,500.00
4. Salary, Benefits, and Pay Policies Survey.	9,500.00
5. Design of Updated Compensation Structure.	12,500.00
6. Development of Job Descriptions.	24,000.00
7. Final Report.	6,400.00
TOTAL PROFESSIONAL FEES (project related expenses are additional and are billed at cost, including printing, shipping, travel, etc.)	***$84,400.00***
Project-Related Expenses (estimate)	***$14,500.00***
TOTAL PROFESSIONAL FEES AND PROJECT-RELATED EXPENSES	***$98,900.00***

OPTIONAL AND/OR VARIABLE SERVICES	Fees
Additional work outside of scope of project, as approved in advance	$200.00 per hour
Additional onsite meetings as ordered to meet with County officials, department directors, etc.,	$1,500.00 per day plus expenses
Employee Appeals	$300.00 per appeal

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PROPOSAL TO CONDUCT A CLASSIFICATION AND COMPENSATION STUDY

FOR

JEFFERSON COUNTY

MAY 2012

PROPOSAL PREPARED BY:

PUBLIC SECTOR
PERSONNEL CONSULTANTS

Regional Office:
27 N. Wacker Drive #604
Chicago, IL 60606
(888) 522.7772
www.compensationconsulting.com

PROPOSAL TO CONDUCT A CLASSIFICATION AND COMPENSATION STUDY FOR JEFFERSON COUNTY

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	*PSPC BOOKLET: **"EZ COMP™"** Program Description*	

PSPC *EZ COMP™* CD-ROM (See Enclosed CD or www.compensationconsulting.com)

PROPOSAL TO CONDUCT A CLASSIFICATION AND COMPENSATION STUDY FOR JEFFERSON COUNTY

INTRODUCTION

LETTER OF TRANSMITTAL

PUBLIC SECTOR
PERSONNEL CONSULTANTS

May 10, 2012

Ms. Terri M. Palm
Human Resources Director
Jefferson County
320 S. Main Street
Jefferson, WI 53549

Dear Selection Team:

Pursuant to your RFP, we are pleased to submit our proposal to assist the County with a Compensation Study. We specialize in this field, and have provided similar services for more than 1,000 public employers throughout the US, including more than 100 County governments.

Current and recently completed projects include Peoria County (IL), the Village of Oak Brook (IL), Stark County (ND), and the City of Marshall (MN).

We are confident that our extensive public employers classification and compensation experience, knowledge of the multiple job evaluation methods, knowledge of public employers, large specialized and highly qualified staff, proven methods, unique ***EZ COMP™*** application to ensure your self-sufficiency, and one year of implementation support and assistance at no cost, will achieve all of the County's objectives for this important project.

Our proposal remains valid for a period of not less than ninety (90) days. We take no exception to any items in the RFP, and have prepared a flexible and responsive proposal for your review. Our proposal and any subsequent negotiations will be in full compliance with the County's terms and conditions.

We appreciate the County's consideration of our proposal. I will be your primary contact for this proposal, act as our firm's responsible agent, and below is my contact information. We would welcome the opportunity to further present our qualifications and interest in person should that assist the County with this important decision.

Sincerely,

Matthew Weatherly
President

(888) 522-7772 PH
(480) 970-6019 FX
mweatherly@compensationconsulting.com
Skype: matt.weatherly1

cc: Robert Miles, SPHR, Vice President – PSPC - Chicago

Regional Location: 27 N. Wacker Drive, #604 Chicago, Illinois 60606
With Offices in St. Paul, MN and Major Cities Nationwide
888.522.7772 - FAX (480) 970-6019 - www.compensationconsulting.com

PROPOSAL TO CONDUCT A CLASSIFICATION AND COMPENSATION STUDY FOR JEFFERSON COUNTY

EXPERIENCE AND QUALIFICATIONS

HISTORY AND FACTS ABOUT OUR FIRM
CLIENT REFERENCES
RESUMES OF PROJECT TEAM MEMBERS
LIST OF COUNTY EMPLOYERS SERVED
1,000+ PUBLIC EMPLOYERS SERVED

PUBLIC SECTOR PERSONNEL CONSULTANTS

PUBLIC SECTOR PERSONNEL CONSULTANTS
HISTORY AND FACTS ABOUT OUR FIRM

- ***HISTORY OF OUR FIRM***

  Public Sector Personnel Consultants (PSPC) originated in 1972 with the Public Sector Group of the international human resources consulting firm of Hay Associates. *PSPC* was established as an independent firm in 1982. We are a single-owner, debt-free subchapter-S corporation.

- ***REGIONAL STAFF***

  We have regional offices or affiliates in Chicago, IL, Austin, TX, Columbus, OH, Dallas, TX, Denver, CO, Kansas City, MO, Los Angeles, CA, Sacramento, CA, St. Paul, MN, San Diego, CA, Santa Fe, NM, Seattle, WA, and Tempe, AZ.

- ***SPECIALIZED IN COMPENSATION SERVICES***

  We are "super-specialists" in compensation, providing services in job analysis, position classification, job content evaluation, compensation, and directly related services. ***Over 98% of our classification and compensation studies have been successfully implemented by our clients.***

- ***SPECIALIZED IN PUBLIC SECTOR CLIENTS***

  We provide services exclusively to public sector employers including municipalities, counties, utility districts, library districts, special districts, state governments, housing and redevelopment agencies, airport authorities, school districts, higher education, and tribal governments.

- ***SPECIALIZED COMPENSATION STAFF***

  Our staff is comprised of eight (8) full time and an additional five (5) part time senior human resources professionals with very extensive experience as compensation managers and consultants for public employers. Our staff has more than 100 years of combined experience working for and consulting to public sector employers.

- ***OVER 1,000 PUBLIC EMPLOYERS SERVED***

  Our staff members have provided compensation, human resources, training and related consulting services to more than 1,000 public and 200 private employers throughout the U.S.

- ***AMERICAN COMPENSATION ASSOCIATION PARTICIPATION (ACA) (NOW WORLDATWORK)***

  Our consultants are active members of ACA, including serving as instructors for the ACA certification courses.

- ***SPECIALIZED COMPENSATION AND RELATED RESOURCES***

  We utilize our ***EZ COMP***™ salary survey and plan program, modified ***FES*** point-factor job evaluation system, ***AEP***™ performance evaluation plan, and ***SNAP***™ staffing needs analysis program.

- ***FIRST YEAR IMPLEMENTATION WARRANTY***

  We provide our clients with extensive implementation support during the first year, and we will analyze, evaluate, classify, and provide a salary range recommendation for any new or changed position or entire job class, at no additional cost.

REPRESENTATIVE CURRENT/COMPLETED PROJECT REFERENCES

Following is a regional sample of local governments that are representative of the more than 1,000 public employers for whom members of our staff have provided job analysis, position classification, FLSA determination, job description, job evaluation, compensation survey, compensation plan development, and/or training services, similar to those requested by the County.

PEORIA COUNTY, IL
Ms. Kate van Beek, Director of Human Resources
324 Main Street
Peoria, IL 61602
(309) 672-6044
kvanbeek@peoriacounty.org

FY 2012 Salary Survey

OAK BROOK, VILLAGE OF, IL
Mr. Blaine Wing, Assistant Village Manager
1200 Oak Brook Road
Oak Brook, IL 60523
(630) 368-5022
bwing@oak-brook.org

Position Classification and FY 2012 Salary Plan

BELTON, CITY OF, MO
Mr. Brad Foster, Assistant City Manager
506 Main Street
Belton, MO 64012
(816) 331-4331
brad@belton.org

Position Classification and FY 2010 Compensation Plan

BOTHELL, CITY OF, WA
Ms. Jamie Marsden, SPHR, Human Resources Director
18305 101st Avenue
Bothell, WA 98011
(425) 489-3395
Jamie.Marsden@ci.bothell.wa.us

Position Classification and FY 2009 and 2011 Salary Plans

BOZEMAN, CITY OF, MT
Mr. Chris Kukulski, City Manager
411 E. Main Street
Bozeman, MT 59715
(406) 582-2300
CKukulski@BOZEMAN.NET

FY 2011 and FY 2007 Salary Surveys

WAYNE BREDE

Mr. Brede has over 30 years of experience working for the Minnesota Department of Transportation as a Workforce Planning Manager and Staffing Services Manager, and has served as a succession planning and career ladder consultant for nearly 50 public and private employers.

He has conducted projects in workforce development, succession planning, job analysis, position classification, job evaluation, compensation surveys, compensation plan development, employee relations, and recruitment. Mr. Brede holds a BA degree in Mass Communications from the University of Minnesota and holds certificates in Public Sector Personnel Management and Industrial Relations.

ROBERT A. MILES, SPHR

Mr. Miles has over 30 years of experience as a human resources manager and consultant for public employers, specializing in position classification and compensation. He has served as Personnel Analyst for the City of Ft. Lauderdale, FL, Personnel Manager for the City of West Palm Beach, FL, Director of Human Resources for the Palm Beach County Sheriff's Department, FL., AND Deputy Personnel Director for the City of Springfield, OH.

He has conducted projects in job analysis, position classification, job evaluation, compensation surveys, compensation plan development, employee relations, recruitment, EEO and affirmative action. Mr. Miles holds a BS degree in Business Administration (cum laude) from Central Ohio State University and the designation as Senior Professional in Human Resources (SPHR) by the Society for Human Resources Management.

ELIZABETH J. TALAMONTI, CCP

Ms. Talamonti has over 30 years of experience as a compensation manager and consultant for public and private employers, specializing in job analysis, salary surveys, and salary plan development. She has served as Compensation Research Associate for Hayes/Hill, Inc., Senior Compensation Analyst for AON Corporation, Compensation Manager for Loyola University, and Project Manager for the American Compensation Association.

She has conducted projects in job audits, job descriptions, salary surveys, compensation database management, compensation plan development, compensation training course development, and compensation trend research. Ms. Talamonti holds a BS degree in Business Administration from Arizona State University. She holds the Certified Compensation Professional (CCP) designation from the American Compensation Association.

KATHERINE TILZER, SPHR

Ms. Tilzer has more than 15 years of experience as a human resources manager and consultant, specializing in employee relations, compensation and recruitment. She has served as Personnel Manager for Laboratory Corporation of America, Director of Human Resources for Plaza Healthcare Inc., and Director of Human Resources for American Baptist Homes.

Ms. Tilzer holds BS degree in Management from the University of Phoenix, and certification as Senior Professional in Human Resources from the Society for Human Resources Management.

MATTHEW E. WEATHERLY, PRESIDENT

Mr. Weatherly has over 15 years of experience as a human resources management professional and consultant, specializing in position classification, compensation, recruitment and selection. He has served as a Human Resources Manager with Employee Solutions, Inc. and Staffing Consultant with Initial Staffing Services.

He has completed projects in staff development, recruitment, selection, job descriptions, salary survey, and salary plan development. Mr. Weatherly holds a BS degree in Human Resources Management from Arizona State University.

COUNTY EMPLOYERS SERVED BY MEMBERS OF OUR FIRM

NOTE: Some of these counties were served by members of our staff before they joined our firm, and were with firms such as Hay Associates, Hewitt Associates, and Commonwealth Personnel Management Services.

Adams County, CO
Apache County, AZ
Baltimore County, MD
Beaver County, PA
Boone County, MO
Broward County, FL
Buncombe County, NC
Camden County, SC
Chaves County, NM
Chesterfield County, VA
Churchill County, NV
Clackmas County, OR
Clark County, NV
Clatsop County, OR
Cochise County, AZ
Contra Costa County, CA
Cook County, IL
Cumberland County, GA
Curry County, NM
Dade Metro County, FL
Dallas County, TX
DeKalb County, GA
Denver County, CO
Dodge County, GA
Doña Ana County, NM
Douglas County, NV
DuPage County, IL
Eau Claire County, WI
Eddy County, NM
Elko County, NV
Emery County, UT
Fayette County, IL
Franklin County, WA
Gila County, AZ
Grant County, WI
Greene County, OH
Greene County, PA
Greenville County, SC
Grundy County, IA
Hamilton County, TN
Harrison County, TX
Hays County, TX
Hennepin County, MN
Henrico County, VA
Honolulu County, HI
Jackson County, MO
Jefferson County, TX
Kalamazoo County, MI
Kane County, IL
Kankakee County, IL
King County, WA
Lake County, IL
Laramie County, WY
Lea County, NM
Lewis County, WA
Linn County, IA
Lorain County, OH
Los Alamos County, NM
Los Angeles County, CA
Luzerne County, PA
Maricopa County, AZ (PW)
Marion County, IN
Martin County, MN
McHenry County, IL
McKinley County, NM
Mercer County, NJ
Midland County, MI
Missoula County, MT
Mohave County, AZ
Monmouth County, NJ
Montgomery County, MD
Multnomah County, OR
Natrona County, WY
Nashville-Davidson County, TN
Navajo County, AZ
New Iberia Parish, LA
Nez Perce County, ID
Peoria County, IL
Pima County, AZ
Pinal County, AZ
Pinelas County, FL
Prince George's County, MD
Ramsey County, MN
Renesselear County, NY
Richmond County, NC
Sacramento County, CA
Sandoval County, NM
San Juan County, NM
Santa Cruz County, AZ
Santa Fe County, NM
Scott County, IA
Solano County, CA
St. Bernard Parish, LA
St. Louis County, MO
St. Lucie County, FL
Walsh County, ND
Walworth County, WI
Ward County, ND
Waukesha County, WI
Wayne County, MI
Whiteside County, IL
Williams County, ND
Wood County, TX
Yuma County, AZ

PUBLIC EMPLOYERS SERVED BY MEMBERS OF OUR FIRM

Following are more than 1,000 public employers for whom ***PUBLIC SECTOR PERSONNEL CONSULTANTS*** staff members have provided compensation and human resources consulting services.

NOTE: Many of these employers were served while the *PSPC* staff member was with Hay Associates, Commonwealth Personnel Services, Government Management Institute, Hewitt Associates, or other consulting firms.

Aberdeen, City of, SD
Academy School District, CO
Adams County, CO
Addison, Village of, IL
Agua Fria Union High School Dist, AZ
Ak-Chin Indian Community, AZ
Alaska Growth Capital, AK
Alaska Native Health Consortium
Alaska, State of
Alberta, Province of
Albuquerque, City of, NM
Aleutian Housing Authority, AK
Alexandria, City of, VA
Algonquin, Village of, IL
Altar Valley School District, AZ
American Federation Govt. Ees, DC
Ames, City of, IA
Anaheim, City of, CA
Anahuac, City of, TX
Apache County, AZ
Apache Junction, City of, AZ
Arapahoe County, CO
Archuleta County, CO
Ardmore, City of, OK
Aristocrat, Inc., NV
Arizona Department of Public Safety
Arizona State University
Arizona, Division of Personnel
Arizona, University of
Arkansas, State of
Artesia, City of, NM
Ashland, City of, OR
Ashville Metro Sewerage District, NC
Assn. of Botanical Gardens, PA
Assn. of Zoological Horticulturists
Aurora, City of, CO
Austin Community College, TX
Austin Housing Authority, TX
Avondale, City of, AZ
Azusa, City of, CA
Balcones Heights, City of, TX
Baltimore County, MD
Baltimore School District, MD
Banning, City of, CA
Bay County, FL
Bay de Noc Community College, MI
Baylor University, TX
Baytown, City of, TX
Beaver County, PA
Bee Cave, Village of, TX
Beloit, City of, WI
Bend, City of, OR
Bensenville, Village of, IL
Bergen County, NJ
Berkeley, City of, CA
Berkshire Medical Center, MA
Bernalillo, Town of, NM
Bernard Community College, FL
Berthoud, Town of, CO
Bethlehem School District, PA
Bettendorf, City of, IA
Billings, City of, MT
Bisbee, City of, AZ
Bismarck Community College, ND
Bismarck State College, ND
Bismarck, City of ND
Bi-State Computer Commission, IA
Blackhawk, Town of, CO
Bloomingdale, Borough of, NJ
Bloomington, City of, MN
Board of Public Utilities, WY
Bolingbrook, City of, IL
Boone County, MO
Boonville, City of, MO
Borough of Fox Chapel, PA
Bosque Farms, Village of, NM
Bothell, City of, WA
Bowling Green State University, OH
Bozeman, City of, MT
Bridgeport, City of, CT
Brighton, City of, CO
Broward County, FL
Bryan Board of Light/Water, OH
Bryn Mawr College, PA
Buckeye, Town of, AZ
Buena Park, City of, CA
Bullhead City, City of, AZ
Burbank, City of, CA

PUBLIC EMPLOYERS SERVED BY MEMBERS OF OUR FIRM

Burlington, City of, KS
Butte County, CA
Calabasas, City of, CA
Calexico, City of, CA
Calgary, City of, AB
California Family Health Council
California Regional Medical Programs
California, State of
California, University of
Camarillo, City of, CA
Camden County, SC
Camden, City of, NJ
Canada:
- Energy & Resources Department
- Health & Welfare Department
- Reg'l Economic Expansion Dept.
- Public Service Commission
- Supply & Services Department
- Transport Department
- Treasury Board

Cañon City, City of, CO
Capitol Area Health Plan Agency, MI
Carbondale, City of, IL
Carlsbad, City of, NM
Carol Stream, Village of, IL
Carrizo Springs, City of, TX
Casa Grande Elementary Schools, AZ
Casa Grande High School District, AZ
Casa Grande, City of, AZ
Catalina Foothills School District, AZ
Cave Creek, Town of, AZ
Cedar Falls Utilities, IA
Cedar Park, City of, TX
Cedar Rapids Public Schools, IA
Cedar Rapids, City of, IA
Centennial, City of, CO
Central Lane Planning Council, OR
Central Oregon Comm. College, OR
Central State Hospital, GA
Central Yavapai Fire District, AZ
Centralia, City of, MO
Chafee County, CO
Chandler, City of, AZ
Charlotte-Mecklenburg Schools, NC
Chatham County, GA
Chaves County, NM
Chesterfield County Public Schools, VA
Chesterfield County, VA
Cheyenne Health Dept., WY
Chicago Univ. Hospitals/Clinics, IL
Chicago, City of, IL
Child Care Group, TX
Child Parent Centers, AZ
Children's Svcs. Council, Palm Beach, FL
Chino, City of, CA
Chitimacha Tribe, LA
Christian Brothers College, TN
Churchill County, NV
Cincinnati, City of, OH
Cincinnati, University of, OH
Clackamas County, OR
Claremont, City of, CA
Clark County Housing Authority, NV
Clark County Sanitation Dist., NV
Clark County Schools, NV
Clark County, NV
Clarkdale, Town of, AZ
Clatsop County, OR
Cleveland County, NC
Cleveland Heights, City of, OH
Cleveland Metroparks, OH
Cleveland, City of, OH
Cochise College, AZ
Cochise County, AZ
Coconino County, AZ
Coldwater State Home, MI
Colleyville, City of, TX
Collierville, Town of, TN
Colorado Mountain College, CO
Colorado University of, CO
Colorado, State of
Colton, City of, CA
Commack Union School Dist., NY
Community Assoc. of the Woodlands, TX
Compton, City of, CA
Coolidge, City of, AZ
Corinth, City of, CA
Cornell University, NY
Costa Rica, Republic of
Cottonwood, City of, AZ
Covina, City of, CA
Cranberry Township, PA
Crane Elementary School Dist., AZ
Crested Butte, Town of, CO
Culver City, City of, CA
Cumberland County, GA
Curry County, NM
Cuyahoga Falls, City of, OH
Dade, Metropolitan County of, FL
Dallas County, TX
Dallas Housing Authority, TX
Darien, City of, IL
DeBary, City of, FL
Deer Valley Unified Schools, AZ

PUBLIC EMPLOYERS SERVED BY MEMBERS OF OUR FIRM

DeKalb County, GA
Delaware, State of
Delaware, University of
Delta County, CO
Delta, City of, CO
Denver, City & County, CO
Des Moines Water Works, IA
Des Moines, City of, IA
Destin, City of FL
Detroit, City of, MI
District 11 School Dist, CO
District of Columbia
Dodge County, GA
Dona Ana County, NM
Douglas County Library Dist, CO
Douglas County, KS
Douglas County, NV
Douglas, City of, AZ
Dover, City of, DE
Downey, City of, CA
Duke University, NC
DuPage County, IL
Durango, City of, CO
Durant, City of, OK
Eagle County, CO
Eagle Pass, City of, TX
East Fork Fire/Rescue Dists, NV
East St. Louis, City of, IL
East Tennessee State University
East Valley Institute of Technology, AZ
Eastern Montana College
Eastern New Mexico Medical Center
Eastern New Mexico University
Eau Claire County, WI
Eau Claire, City of, WI
Ecuador, Republic of
Eddy County, NM
Edmond, City of, OK
Edmonds, City of, WA
El Centro, City of, CA
El Mirage, City of, AZ
El Monte, City of, CA
El Paso County, TX
El Paso, City of, TX
El Reno, City of, OK
El Segundo, City of, CA
Elkhart General Hospital, IN
Elko County, NV
Elmbrook Public Schools, WI
Elmhurst Park District, IL
Elmhurst Public Schools, IL
Elmhurst, City of, IL
Eloy, City of, AZ
Emery County, UT
Enterprise City School District, CA
Estes Park, City of, CO
Evanston, City of, IL
Fall River Public Schools, MA
Fargo, City of, ND
Farmers Branch, City of, TX
Fayette County, IL
Fayetteville, Manlius Schools, NY
Federal Heights, City of, CO
Firestone, Town of, CO
Flagler Beach, City of, FL
Florence Public Schools, AL
Florence, Town of, AZ
Florence-Darlington Tech. Ed. Center, SC
Florida State University
Florida, State of
Fort Collins, City of, CO
Fort Huachuca Accom. School, AZ
Fort McDowell Tribal Government, AZ
Fort Morgan, City of, CO
Fort Pierce Housing Auth., FL
Fort Pierce, City of, FL
Fort Wayne Housing Auth., IN
Fox Chapel, Borough of, PA
Fox Point Bayside School Dist., WI
Fox Valley Council of Governments, WI
Frankfort, Village of, IL
Franklin County, WA
Franklin Park, Borough of, PA
Fraser, Town of, CO
Frederick, City of, OK
Fremont County, CO
Fresno State College, CA
Fresno, City of, CA
Frisco, City of, TX
Galveston, Port of, TX
Garden City, City of, KS
Gardena, City of, CA
Geneseo, City of, IL
Georgetown University, Wash DC
Georgia Institute of Technology
Georgia Regional Hospital
Georgia, State of
Georgia, University of
Gila County Community Development, AZ
Gila County Public Works, AZ
Gila County, AZ
Gila River Gaming Enterprises, AZ
Gila River Tribal Government, AZ
Gilbert, Town of, AZ

PUBLIC EMPLOYERS SERVED BY MEMBERS OF OUR FIRM

Gillette, City of, WY
Gilpin County, CO
Gladstone, City of, MO
Glendale, City of, AZ
Glendale, City of, CA
Glendale, City of, CO
Glenwood Springs, City of, CO
Goforth Water Systems, TX
Good Samaritan Hospital, AZ
Graceland College, IA
Grand Canyon School Dist, AZ
Grand Canyon University, AZ
Grand Forks Airport Auth., ND
Grand Forks, City of, ND
Grand Haven Public Schools, IA
Grand Junction, City of, CO
Grand Rapids, City of, WI
Grand Ronde Tribe, OR
Grant County, WI
Grant Hospital of Chicago, IL
Grayson County, TX
Great Falls, City of, MT
Greater Texas Credit Union
Green Bay Sewerage District, WI
Green River, City of, WY
Greene County, OH
Greene County, PA
Greensville Public Schools, NC
Greenville County, SC
Greenville General Hospital, SC
Greenville, City of, SC
Gresham Public Schools, OR
Grundy County, IA
Guam Community College
Guam, Territory of
Gulf Breeze, City of, FL
Gunnison, City of, CO
Haltom City, City of, TX
Hamilton County 911, TN
Hamilton County, TN
Hampton, Township of, PA
Harbor General Hospital, CA
Harrison County, TX
Hawaii Health Department
Hawaii, State of
Hawaiian Gardens, City of, CA
Hawthorne Comm. Hospital, CA
Hawthorne, City of, CA
Hayden-Winkelman Schools, AZ
Hays County, TX
Helena, City of, MT
Hemet, City of, CA
Henderson, City of, NV
Hennepin County Gen'l Hosp. MN
Hennepin County, MN
Henrietta Central School Dist., NY
Herndon, City of, VA
Hickory Public Schools, NC
Highland Community College, IL
Highland Hospital, Rochester, NY
Highland Park Model Cities, NJ
Highland Park, City of, MI
Hobbs, City of, NM
Hoboken Model Cities, NJ
Holbrook School District, AZ
Holbrook, City of, AZ
Honolulu City & County of, HI
Hopi Tribal Government, AZ
Horseshoe Bay, City of, TX
Housing Authority of Alameda County, CA
Houston Housing Authority, TX
Hull, City of, QE
Huntington Beach, City of, CA
Hunts Points Multi Svc Agency, NY
Huntsville, City of, AL
Idaho, State of
Illinois College of Optometry
Illinois Dept. of Nuclear Safety
Illinois Municipal Retirement Fund
Illinois, State of
Illinois, University of
Indian Community School, WI
Indian Rocks Beach, City of, FL
Indiana, State of
Indianapolis, City of, IN
Indio, City of, CA
Inglewood, City of, CA
Inkster Public Schools, MI
Inland Valley Development Agency, CA
Inter-Comm Hosp. Foundation, CA
Iowa Public Broadcast Network
Iowa, State of
Isaac School District, AZ
Jackson County, MO
Jackson, City of, MS
Jacksonville, City of, AR
Jacksonville, City of, FL
Jacksonville Aviation Authority, FL
Jefferson County Appraisal District, TX
Jefferson County Navigation District, TX
Jefferson County, AL
Jefferson County, CO
Jefferson County, TX
Jersey City State College, NJ

PUBLIC EMPLOYERS SERVED BY MEMBERS OF OUR FIRM

Jersey City, City of, NJ
Jo Davies County, IL
Johns Hopkins Hospital, MD
Henrico County, VA
Henrietta Central School Dist., NY
Herndon, City of, VA
Hickory Public Schools, NC
Highland Community College, IL
Highland Hospital, Rochester, NY
Highland Park Model Cities, NJ
Highland Park, City of, MI
Hobbs, City of, NM
Hoboken Model Cities, NJ
Holbrook School District, AZ
Holbrook, City of, AZ
Honolulu City & County of, HI
Hopi Tribal Government, AZ
Horseshoe Bay, City of, TX
Housing Auth. of City of Las Cruces, NM
Housing Authority of Alameda County, CA
Houston Housing Authority, TX
Hull, City of, QE
Huntington Beach, City of, CA
Hunts Points Multi Svc Agency, NY
Huntsville, City of, AL
Idaho, State of
Illinois College of Optometry
Illinois Dept. of Nuclear Safety
Illinois Municipal Retirement Fund
Illinois, State of
Illinois, University of
Indian Community School, WI
Indian Rocks Beach, City of, FL
Indiana, State of
Indianapolis, City of, IN
Indio, City of, CA
Inglewood, City of, CA
Inkster Public Schools, MI
Inland Valley Development Agency, CA
Inter-Comm Hosp. Foundation, CA
Iowa Public Broadcast Network
Iowa, State of
Isaac School District, AZ
Jackson County Public Hosp., MO
Jackson County, MO
Jackson, City of, MS
Jacksonville, City of, AR
Jacksonville, City of, FL
Jefferson County Appraisal District, TX
Jefferson County Navigation District, TX
Jefferson County, AL
Jefferson County, CO
Jefferson County, TX
Jersey City State College, NJ
Jersey City, City of, NJ
Jo Davies County, IL
Johns Hopkins Hospital, MD
Johnson County Water District, KS
Johnson County, KS
Johnstown, Town of, CO
Joliet, City of, IL
Jonesville, Village of, MI
Joplin, City of, MO
Kalamazoo Community College, MI
Kalamazoo, City of, MI
Kalamazoo, County, MI
Kane County, IL
Kankakee County, IL
Kansas City College District, MO
Kansas City, City of, KS
Kansas City, City of, MO
Kansas, State of
Kearney, City of, NE
Kenosha Public Schools, WI
Kentucky, State of
Killeen, City of, TX
King County, WA
Kingman, City of, AZ
Kingsport, City of, TN
La Plata County, CO
Laconia, City of, NH
Lake County, IL
Lake Havasu City, City of, AZ
Lake Sumter Community College, FL
Lake Tahoe Community College, CA
Lakeway, City of, TX
Lakewood, City of, CA
Lamar University, TX
Lancaster Public Schools, OH
Lane Community College, OR
Lansing, City of, MI
Laramie County Library System, WY
Laramie County, WY
Las Cruces, City of, NM
Las Vegas Metro Police Dept., NV
Las Vegas Valley Water District, NV
Las Vegas, City of, NV
Lawndale, City of, CA
Lawton, City of, OK
Lea County, NM
Lewis County, WA
Libertyville, City of, IL
Lincoln Land Community College, IL
Lincoln, City of, CA

PUBLIC EMPLOYERS SERVED BY MEMBERS OF OUR FIRM

Linn County Public Schools, IA
Linn County, IA
Littleton Elementary School District, AZ
Lochbuie, Town of, CO
Lockport, City of, IL
Logan, City of, UT
Lombard, Village of, IL
Lompoc, City of, CA
Long Beach, City of, CA
Long Island Jewish Hospital, NY
Lorain County, OH
Los Alamos County, NM
Los Angeles Comm. Colleges, CA
Los Angeles County Police Union, CA
Los Angeles County, CA
Los Angeles, City of, CA
Los Lunas, Village of, NM
Louisiana, State of
Louisville, University of, KY
Lowell, City of, MA
Luna Vocational Tech Institute, NM
Luzerne County, PA
Macalester College, MN
MacNell Memorial Hospital, IL
Macon, City of, GA
Madison Sewerage District, WI
Madison, City of, WI
Maimondes Medical Center, NY
Maine, State of
Mandan, City of, ND
Mankato State University, MN
Marana School District, AZ
Marana, Town of, AZ
Maricopa Assoc. of Governments, AZ
Maricopa Community College Dist, AZ
Maricopa County, AZ
Maricopa Housing Authority, AZ
Maricopa Superior Court, AZ
Maricopa, City of, AZ
Marion County, IN
Marquette University, WI
Mars Hill College, NC
Marshall County, IA
Marshall County, PA
Marshall, Township of, PA
Marshfield, City of, WI
Martin County, MN
Maryland, State of
Maryland/Capitol Planning Comm
Massachusetts Hospital Association
Massachusetts, State of
McHenry County Housing Authority, IL
McHenry County, IL
McKinley County, NM
McPherson College, KS
Mem'l Hosp. of DuPage County, IL
Mem'l Med. Ctr., Savannah, GA
Mendocino College, CA
Mequon, City of, WI
Mercer County, NJ
Mercy Hospital, Cedar Rapids, IA
Mercy Hospital, Springfield, MA
Methodist Hospital, Gary, IN
Methodist Hospital, Indianapolis, IN
Metroparks of Toledo, OH
Metro Toronto, ON
Metro Water District, IL
Metropolitan Sanitary District, IL
Miami Area School District, AZ
Miami Shores, Village of, FL
Michigan Municipal League
Michigan, State of
Midland County, MI
Midland Police Academy, TX
Milliken, Town of, CO
Milwaukee County, WI
Milwaukee Metro Sewer Dist., WI
Milwaukee Public Schools, WI
Minneapolis, City of, MN
Minneapolis Public Schools, MN
Minnesota League of Cities
Minnesota, State of
Minnesota, University of
Minot Park District, ND
Minot, City of, ND
Missoula County Airport Authority, MT
Missoula County, MT
Missoula, City of, MT
Missouri, State of
Mobile, City of, AL
Moffat County Library, CO
Mohave County Courts, AZ
Mohave County, AZ
Monmouth County, NJ
Monroe Public Schools, MI
Montana State University
Montclair, City of, CA
Monterey Park, City of, CA
Monterey/Salinas Transit, CA
Montgomery County Schools, MD
Montgomery County, MD
Montpelier Public Schools, VT
Montpelier, City of, VT
Montrose County, CO

PUBLIC EMPLOYERS SERVED BY MEMBERS OF OUR FIRM

Montrose, City of, CO
Moore Public Schools, OK
Moore, City of, OK
Moro Bay, City of, CA
Morongo Valley Schools, CA
Morton Community College, IL
Moundridge Public Schools, KS
Mountain View, City of, CA
Mountain Village, Town of, CO
Mt. Lebanon, Township of, PA
Mt. Prospect, Village of, IL
Mt. Sinai Hospital, Milwaukee, WI
Multnomah County, OR
Muscatine Power & Water, IA
Muskego, City of, WI
Muskego-Norway School Dist., WI
Naperville, City of, IL
Nashville-Davidson County, TN
Nassau County School District, FL
National City, City of, CA
National Council on Alcoholism, NY
Natrona County, WY
Navajo Arts & Crafts Enterprise, AZ
Navajo Community College, AZ
Navajo County, AZ
Navajo Partnership for Housing, AZ
Navajo Utility Authority, AZ
Nebraska, State of
Nederland, City of, TX
Needles, City of, CA
New Braunfels, City of, TX
New Hampshire, State of
New Iberia Parish, LA
New Jersey Comm Training Institute
New Jersey, State of
New Lenox, Village of, IL
New Mexico Association of Counties
New Mexico Junior College
New Mexico Military Institute
New Mexico, State of
New Orleans, City of, LA
New York Port Authority, NY
New York Public Schools, NY
New York State University, NY
New York University Medical Center, NY
New York, City of, NY
New York, State of, NY
Nez Perce County, ID
Nixa, City of, MO
Nogales, City of, AZ
Norco, City of, CA
Norman School District, OK
Norman, City of, OK
North Carolina, State of
North County Fire Protection District, CA
North Dakota, State of
North Idaho College
North Las Vegas, City of, NV
North Pacific Rim Housing Authority, AK
North Slope Borough, AK
North Table Mtn Water Dist, CO
Northern Marianas, Commonwealth of
Northland Pioneer College, AZ
Northwest Kansas Medical Center, KS
Norwalk Redevelopment Agency, CT
Nova Scotia, Province of
Oak Brook, Village of, IL
Oakland County, CA
Oakland Housing Authority, CA
Oakland University, MI
Oakland, City of, CA
Ogallala, City of, NE
Ogden, City of, UT
Ohio County Public Schools, WV
Ohio, State of
Ohio, University of
Oklahoma City Zoological Trust, OK
Oklahoma Municipal League
Oklahoma State University
Oklahoma, State of
Oldsmar, City of, FL
Omaha Airport Authority, NE
Omaha Police Union, NE
Omaha, City of, NE
Ontario, Province of
Orange County, FL
Oregon Dept. of Env'l Quality
Oregon, State of
Oro Valley, Town of, AZ
Osseo, City of, MN
Oswego, City of, WI
Oxford, City of, OH
Ozarks, College of, AR
Page Unified School District, AZ
Page, City of, AZ
Pagosa Springs, Town of, CO
Palestine, City of, TX
Palm Beach County, FL
Palm Springs, City of, CA
Palmer Chiropractic College, IA
Panama, Republic of
Pantego, City of, TX
Paradise Valley, Town of, AZ
Parker Fire Protection District, CO

PUBLIC EMPLOYERS SERVED BY MEMBERS OF OUR FIRM

Parker, Town of, AZ
Parsippany-Troy Hills Schools, NY
Pasadena, City of, CA
Paul's Valley, City of, OK
Payson, Town of, AZ
Pearland, City of, TX
Pennsylvania, State of
Penrose Cancer Hospital, CO
Pensacola Junior College, FL
Peoria County, IL
Peoria Public Schools, IL
Peoria School District, AZ
Peoria, City of, AZ
Peoria, City of, IL
Perris, City of, CA
Perry, City of, OK
Philadelphia, City of, PA
Philander Smith College, AR
Phoenix Children's Hospital, AZ
Phoenix Elementary School. Dist., AZ
Phoenix Union High School Dist., AZ
Phoenix, City of, AZ
Pierce County Library System, WA
Pima Association of Governments, AZ
Pima County Superior Court, AZ
Pima County, AZ
Pinal County, AZ
Pine, Township of, PA
Pinetop-Lakeside, Town of, AZ
Pinellas County, FL
Pinellas Park, City of, FL
Pinon Community School, AZ
Pittsburgh, City of, PA
Placentia, City of, CA
Pojoaque Gaming, Inc., NM
Polk Community College, FL
Pomona, City of, CA
Ponca City, City of, OK
Pontiac, City of, MI
Port Huron School District, MI
Port Lavaca, City of, TX
Port Neches, City of, TX
Portage, City of, MI
Portland, City of, OR
Presbyterian Hospital, NY, NY
Presbyterian-St. Luke's Hospital, IL
Prescott Valley, Town of, AZ
Prescott, City of, AZ
Prince George's County, MD
Prospect Heights, City of, IL
Providence Hospital, KC, MO
Provident Hospital, Chicago, IL
Provo, City of, UT
Public Risk Management Authority, CA
Pueblo West Metro District, CO
Puerto Rican Forum, NY, NY
Puerto Rico, Commonwealth of
Puerto Rico, University of
Puget Sound Air Pollution Agency, WA
Pulaski Memorial Hospital, Chicago, IL
Quebec, Province of
Queen Creek, Town of, AZ
Racine, City of, WI
Ramsey County, MN
Rantoul, City of, IL
Rapid City, City of, SD
Redford, Township of, MI
Redwood City, City of, CA
Regional Transportation Authority, IL
Regional Transportation Commission, NV
Rhode Island Hospital, Providence
Rhode Island, State of
Rialto, City of, CA
Richland, City of, CA
Richmond County, NC
Richmond Housing Authority, VA
Richmond, City of, VA
Richmond, City of, WI
Ridgecrest School District, CA
Rifle, City of, CO
Rio Rancho, City of, NM
River Forest, Village of, IL
River Oaks, City of, TX
Riverside County, CA
Riverside School District, CA
Riverside, City of, CA
Riverside, County of, CA
Roanoke Redevelopment Authority, VA
Rochester, City of, NY
Rockford Public Schools, IL
Rockingham County, VA
Rockwall, City of, TX
Rolla, City of, MO
Rolling Meadows, City of, IL
Roosevelt, City of, UT
Roselle, Village of, IL
Rosemead, City of, CA
Rowlett, City of, TX
Ruidoso, Village of, NM
Sacramento County, CA
Sacramento Housing Authority, CA
Sacramento Municipal Utility District, CA
Sacramento Reg'l Sanitation Dist, CA
Sacramento, City of, CA

PUBLIC EMPLOYERS SERVED BY MEMBERS OF OUR FIRM

Safford, City of, AZ
Saginaw, City of, MI
Sahuarita, Town of, AZ
Salida, City of, CO
Salina Public Schools, KS
Salina, City of, KS
Salt Lake City, City of, UT
Salt Lake Metro Water District, UT
Salt River Tribal Government, AZ
San Angelo, City of, TX
San Antonio, City of, TX
San Bernardino Associated Gov'ts, CA
San Bernardino Int'l Airport Auth, CA
San Carlos Apache Tribe, AZ
San Clemente, City of, CA
San Diego County, CA
San Diego, City of, CA
San Felipe Pueblo, NM
San Francisco State College, CA
San Jacinto College District, TX
San Jose, City of, CA
San Juan Capistrano, City of, CA
San Juan Public Schools, CA
San Juan Pueblo, NM
San Luis, City of, AZ
San Xavier District (TON), AZ
Sand Hills Community Action, NC
Sandusky, City of, OH
Sandy, City of, UT
Santa Ana, City of, CA
Santa Barbara County, CA
Santa Cruz County, AZ
Santa Cruz County, CA
Santa Cruz Valley School Dist., AZ
Santa Cruz, City of, CA
Santa Fe Community College, NM
Santa Fe County, NM
Santa Fe Housing Authority, NM
Santa Monica, City of, CA
Sarasota Airport Authority, FL
Saskatchewan, Province of
Saudi Arabia, Kingdom of
Saydell School District, IA
Schertz, City of, TX
Scotia-Glenville Public Schools, NY
Scott County, IA
Scottsdale Cultural Council, AZ
Scottsdale, City of, AZ
Seaside, City of, CA
Sedona Fire District, AZ
Sedona, City of, AZ
Seminole, City of, OK
Shaler, Township of, PA
Shawnee Public Schools, OK
Sheboygan, City of, WI
Shelburne, City of, VT
Shelby, City of, NC
Shreveport, City of, LA
Sierra Vista School District, CA
Sierra Vista, City of, AZ
Silt, Town of, CO
Silverthorne, Town of, CO
Sinai Hospital of Detroit, MI
Sioux City, City of, IA
Sisters of Charity, TX
Sisters of St. Joseph, CA
Skokie, City of, IL
Solana Beach, City of, CA
Somerton School District, AZ
Sound Transit Authority, WA
South Alabama Reg'l Plan Comm.
South Carolina, State of
South Central MI Health Council
South Dakota, State of
South Gate, City of, CA
South Metro Fire District, CO
South Padre Island, Town of, TX
Southeastern Education Lab, GA
Southeastern Plan/Dev Dist, MA
Southern Illinois University
Southern Ute Indian Tribe, CO
Southlake, City of, TX
Southwestern Illinois Plan Comm.
Spartanburg Technical College, SC
Spirit Mountain Gaming, OR
Spokane Public Library, WA
Spokane, City of, WA
Springfield, City of, IL
St. Bernard Parish, LA
St. Charles, City of, IL
St. Francis Hospital, La Crosse, WI
St. George, City of, UT
St. John's Hospital, Salina, KS
St. John's University, MN
St. Joseph's Hospital, Denver, CO
St. Louis County, MO
St. Louis Metro Sanitary District, MO
St. Louis, City of, MO
St. Lucie County Fire District, FL
St. Luke's Hospital, Racine, WI
St. Mary's Hospital, Tucson, AZ
St. Mary's University, TX
St. Paul Housing Authority, MN
St. Paul, City of, MN

PUBLIC EMPLOYERS SERVED BY MEMBERS OF OUR FIRM

St. Vincent Hosp/Med. Center, NY, NY
St. Vincent Hospital, Jacksonville, FL
State Bar of Texas
State Fair Community College, MO
Sterling, City of, CO
Stockton, City of, CA
Stubenville, City of, OH
Summit County, CO
Sun City West, City of, AZ
Sunny Isles Beach, City of, FL
Sunnyside Public Schools, AZ
Sunnyside USD No. 12, AZ
Superior, Town of, CO
Surprise, City of, AZ
Susanville Public Schools, CA
Sutter-Yuba Counties Health Dept., CA
Suwanee County, FL
Syracuse University, NY
Tacoma Housing Authority, WA
Tampa Port Authority, Tampa, FL
Taos, Town of, NM
Tarrant County Comm. College, TX
Telluride, Town of, CO
Tempe Elementary School District, AZ
Tempe High School District, AZ
Tempe, City of, AZ
Temple University Hospital, PA
Temple University, PA
Tennessee, State of
Tennessee, University of
Texas Department of Banking
Texas Department of Transportation
Texas Office of the Attorney General
Texas Water Development Board
The Navajo Nation, AZ
Thornton, City of, CO
Thousand Oaks, City of, CA
Three Villages School District, NY
Tillamook Bay Community College, OR
Timberland Regional Library District, WA
Tohono O'odham Nation, AZ
Tomball, City of, TX
Topeka, City of, KS
Torrance, City of, CA
Tracy, City of, CA
Transylvania University, KY
Tri-County Health Dept, CO
Tri-County Reg'l Planning Comm, OH
Truth or Consequences, City of, NM
Tucson Unified School District, AZ
Tucson, City of, AZ
Tulare, City of, CA
Tularosa, Village of, NM
Tulsa, City of, OK
Umpqua Community College, OR
Union Theological Seminary, NY
United Nations

United States
- Agriculture Department
- Army, Department of
- Atomic Energy Commission
- Civil Service Commission
- Commerce Department
- Defense Department
- Health, Education & Welfare Dept.
- Housing & Urban Development Dept.
- Justice (LEAA) Department
- State (AID) Department
- Transportation Department
- Veterans Administration

University of Illinois Medical School
Upper Missouri District Health Unit, ND
Utah, State of
Valdez, City of, AK
Valley Metro Rail, AZ
Valleys Planning Council, MD
Valpariso University, IN
Vanderbilt University, TN
Ventura County Housing Authority, CA
Ventura County, CA
Vermont, State of
Vermont, University of
Vero Beach, City of, FL
Villa Park, Village of, IL
Virginia, State of
Visalia, City of, CA
Wake County, NC
Walsh County, ND
Waltham Hospital, MA
Walworth County, WI
Ward County, ND
Warr Acres, City of, OK
Warren County Public Schools, PA
Warren General Hospital, OH
Warrensburg, City of, MO
Washington Hospital Center, DC
Washington, State of
Washoe County School District, NV
Water Facilities Authority, CA
Waterford, City of, WI
Waukee, City of, IA
Waukegan, City of, IL
Waukesha County, WI

PUBLIC EMPLOYERS SERVED BY MEMBERS OF OUR FIRM

Waverly Light & Power, IA
Wayne County, MI
Wayne County Airport Authority, MI
Webster, City of, TX
Weirton, City of, WV
Welfare Council of Metro Chicago, IL
Wentzville, City of, MO
Wesley Mem'l Hospital of Chicago, IL
West Chicago, City of, IL
West Covina, City of, CA
West Palm Beach, City of, FL
West Virginia, State of
Westbury Public Schools, NY
Western AZ Council of Governments
Western Heights School District, OK
Western Kentucky University
Western Michigan University
Western New Mexico University
Western Oklahoma State College
Westminster, City of, CA
Wheaton, City of, IL
Wheatridge Fire Protection District, CO
Wheeling, City of, WV
Whiteside County, IL
Wickenburg, City of, AZ
Williams County, ND

Williams Gateway Airport, AZ

Williams, City of, AZ
Williston, City of, ND
Wilmette Park District, IL
Windcrest, City of, TX
Windsor Library District, CO
Windsor, Town of, CO
Winfield, Village, IL
Winnetka, Village of, IL
Wisconsin, State of
Wisconsin, University System of
Wood County, TX
Woodlands, Community Ass'n, TX
Wylie, City of, TX
Wyoming, State of
Yankton, City of, SD
Yavapai Fire District, AZ
Yorba Linda, City of, CA
Yuba City, City of, CA
Yukon Health Corporation, AK
Yuma County Justice Courts, AZ
Yuma County Superior Court, AZ
Yuma County, AZ
Yuma Housing Authority, AZ
Yuma School District One, AZ
Yuma, City of, AZ
Zelienople, Borough of, PA

PROPOSAL TO CONDUCT A CLASSIFICATION AND COMPENSATION STUDY FOR JEFFERSON COUNTY

PROJECT APPROACH AND METHODOLOGY

SUMMARY OF SERVICES FOR THE COUNTY
PROJECT SCOPE AND METHODOLOGY
PROJECT TIMELINE – GANTT CHART

PUBLIC SECTOR PERSONNEL CONSULTANTS

SUMMARY OF SERVICES FOR THE COUNTY

PUBLIC SECTOR PERSONNEL CONSULTANTS (PSPC) proposes the following program of consulting services and implementation support to achieve all of the objectives stated in the County's RFP.

Project Planning and Communication

1. Project planning and scheduling meeting with the County's Human Resources Staff, project designee(s)
2. Policy input and project direction meeting and briefing with Board, Human Resources and designee(s)
3. Project briefing presentation for all employees, Board, Elected Officials, Departments, project leaders
4. Management and employee communication, progress reports throughout all project phases

Classification Project Tasks

5. Occupational familiarization by review of County's current job descriptions and compensation plans
6. Organizational familiarization by review of County organization charts, budgets, and annual reports
7. Position Analysis Questionnaire (PAQ) customized for gathering County employee occupation data
8. Meetings to distribute and explain the PAQ and the project for all County officials and employees
9. Worksite job desk audits / field observations with representatives of each class *(variable for cost)*
10. Determination of job classification and FLSA Exempt / Non-Exempt designation for each position
11. Recommended title modifications and reclassifications for consideration by department heads
12. Review of position classification recommendations with County's project staff, Offices, departments
13. Preparation of updated ADA/EEO-compliant job descriptions for each job classification *(as needed)*
14. Resolution of employee reviews of classification recommendations and draft job descriptions

Custom and Comprehensive Market Compensation Survey

15. Identification of County's competitive employment areas for compensation survey, for County approval
16. Identification of County occupations to utilize as survey benchmark job classes – target 60%+ jobs
17. Solicitation of comparator employers and agencies for participation in external compensation survey
18. Extraction of data from public employer compensation plans, questionnaires, reliable published surveys
19. Calculation of prevailing rates by benchmark job classification for comparison to County plans
20. Consolidation of data from all sources and calculation of prevailing rates for benchmark jobs
21. Computation of extent County's compensation offerings vary from external prevailing rates / practices
22. Review of competitiveness analysis with Human Resources, County Officials and project designees

Compensation Plan Development

23. Construction of optional salary range structures for review and selection by County's project leaders
24. Assignment of job classes to salary ranges by internal equity and external competitiveness
25. Assistance with County Board identification of desired, affordable salary competitiveness policy
26. Fiscal impact estimates at various levels of external prevailing rates competitiveness policies
27. Review and critique of draft salary and implementation plans with Human Resources, project leaders

Communication of Results and Implementation Strategies

28. Preparation and presentation of a final project reports for the County Board, staff, and County Officials
29. Development of a plan for the implementation of County's updated classification and compensation plan
30. Uploading of ***EZ COMP™*** program files on a Human Resources Department computer, staff training
31. Development and provision of process for ongoing plan maintenance and subsequent plan updates
32. Assistance with communicating the County's updated plans for all County officials and employees
33. One year classification and compensation plan maintenance assistance ***at no cost to the County***

PROJECT APPROACH AND METHODOLOGY

Following is our overall work plan and approach to achieving the County's objectives for the conduct of a classification and compensation study, and meeting all of the stated objectives from the RFP.

A. OBJECTIVES OF THE PROJECT

The recommended plans, programs, systems and administrative procedures will meet these ten most important criteria.

- Internally equitable
- Externally competitive
- Readily understood
- Easily updated & maintained
- Legally compliant & defensible
- Financially responsible
- Efficiently administered
- Inclusive of employee input
- Reflective of County's values
- Reflective of prevailing "best practices"

B. SCOPE OF THE PROJECT

The project includes a management and employee communication plan; partnership with the County's Human Resources Director, Committees, Boards, and project designee(s); occupational, organizational, and operational familiarization; Position Analysis Questionnaire (PAQ) and job analysis for all classifications; worksite job information interviews; position classification and job title recommendations for all employees and classifications; FLSA designations; as needed, updated ADA/EEO-compliant job descriptions; ***EZ COMP™;*** internal equity and external competitiveness evaluation; compensation survey and competitiveness analysis; salary range recommendations; fiscal impact estimates and multiple implementation scenarios; updated classification and compensation plan and one year of classification and compensation plan implementation support for all included employees.

C. PROJECT METHODOLOGY

1. Quality Assurance

To ensure a high quality project, we have built in several layers of procedural and statistical controls, in addition to those already in ***EZ COMP™***. Internally, we follow a prescribed series of steps in each project phase, which are reviewed by our Project Director. We request that the Human Resources and County's Project Manager(s) review our work to minimize the chance of errors and to ensure that it reflects the County's organizational values.

2. Project Planning Meetings and Communication Plan Development

We will consult with the Human Resources Director and County Officials or representatives on a communication strategy, plan, and materials, beginning prior to the project and extending to the post-project information meetings. We plan to conduct group pre-project meetings for all County officials and employees where we will discuss the project's scope, answer questions, and distribute and explain the Position Analysis Questionnaire.

See "*Communicating the Project to the Employees*" in the Appendices for additional information regarding our approach to employee inclusion and communication.

D. *POSITION CLASSIFICATION REVIEW*

1. *Review of Essential Tasks – Position Analysis Questionnaire*

We will review and analyze the current essential tasks, duties and responsibilities, and minimum qualifications of each included position through the Position Analysis Questionnaire (PAQ) to be completed by each employee (or group of employees with identical jobs) in print or electronic format. If the information on the PAQ does not clearly delineate the position's scope of responsibilities, we may return the PAQ to the position's incumbent for additional information, or focus on the data gap during a worksite job information interview.

2. *Employee Worksite Job Information Interviews (variable for cost options)*

We can conduct a worksite job information interview with a representative incumbent of every job classification. The purpose of these interviews is to verify the data on the PAQ, obtain additional insight into the scope and complexity of the job duties, observe technical processes and working conditions, and to provide employees with an additional method of participation in the project. This process also ensures that we make all internal and external comparisons on the basis of ***actual job content*** and not merely job title.

3. *FLSA Status Determination*

We will review the essential tasks and minimum qualifications of each of the County's job classifications and subject them to the Fair Labor Standards Act tests to determine their exempt or non-exempt status.

4. *Position Classification*

Each of the County's positions will be analyzed and evaluated to determine their primary characteristics, including:

- Is there a current County occupational job group comprised of job classes with essential functions similar to the subject position; if so:
- To which of the group's job classes, and at what level, are the subject position's essential functions similar to the subject position, and if so:
- Are they sufficiently comparable (+/- 20% guideline) to be allocated to that job class, utilize the same job title, require the same minimum qualifications, and be assigned to the same salary range.
- If the County does not currently have a sufficiently comparable job class, what should be the subject position's occupational job class and title, and:
- What should the recommended occupational classification action be, No Change (N), Title Change (T), Merge With Other Job Class (M), New Job Class (J).
- We may find that a job class is overly broad and encompasses several job activities which are regarded with significant salary difference in the marketplace. In such an instance, we will recommend "splitting" the job class into the current job class and a new job class which encompasses the different job activities.

5. ***Updated Job Descriptions* (as needed)**

We will prepare an updated ADA/EEO-compliant job description in the County's standard or other selected format for each occupational job class. Focus will be on the Essential Functions and Minimum Qualifications. The specifications or descriptions may include (not limited to) the following components:

Job Title – Definition	Education, Training and Experience	Physical Requirements
Distinguishing Characteristics	Licenses and Certifications	Non-Essential Functions
Essential Functions	FLSA Exempt/Non-Exempt Status	Mental Requirements
Desired Knowledge and Skills	Supervision Exercise/Received	Working Conditions

6. ***Draft Classification Plan Review with Human Resources and Department Heads***

We will conduct a review of our initial position classification recommendations and draft job descriptions with the County's Project Team and respective department heads to identify possible errors, obtain feedback, and solicit suggestions for clarification.

7. ***Resolution of Employees' Classification Reviews***

We will provide the County with a process for employees to review our initial occupational job classification of their position, and provide a form for them to complete if they feel that an error has been made or to provide significant additional job content information.

Depending on the action recommended by the respective department heads we may conduct a second job analysis and will inform the project designee(s) of our final recommendation.

8. ***Various Approaches to Ensure Internal Equity***

If desired, and for precision in job class analyses, and subsequent salary range determinations, we may utilize one of several job evaluation systems widely in use, including the Hay Method, Decision Band Method (DBM), and the ***Factor Evaluation System (FES)***. ***FES*** is the most extensively validated and commonly utilized quantitative job evaluation system for public sector occupations, consisting of the following flexible compensable factors.

Knowledge Required	Personal Contacts	Complexity
Supervisory Controls	Scope and Effect	Work Environment
Guidelines Provided	Supervision Exercised	Physical Demands

The job class hierarchy based on job points will reflect the County's relative internal job worth values. The County's annual salary competitiveness policy will be translated into a mathematical formula which, when combined with the job points of each County job class, will determine the proper salary range for each job class and position. This balances internal equity (job points relationships) with external competitiveness (market relationship formula).

a. ***Optional Approach A – FES System*** – We will train a task force of representative County employees in the adaptation of the ***FES*** point-factor job content evaluation system to the County's job worth values, guide them in the evaluation of a structured benchmark of job classes, conduct QC reviews, and evaluate the remaining job classes within the relative job worth structure established by the task force. We can provide the County with manual or automated versions of this system.

b. ***Optional Approach B – Custom Designed System for the County*** – We will train and guide a task force of representative County employees in the design of a point-factor system of job content evaluation total reflecting the County's relative job worth values, and proceed as in Approach A. We can provide the County with an automated version of the system once it has been developed with the task force.

E. COMPREHENSIVE AND SUSTAINABLE COMPENSATION PLAN

1. County Involvement in Compensation Plan Development

We will obtain policy direction from the County Board, Human Resources staff, and/or County Officials on the following key components of the salary plan development process:

- Comparator Employer Selection
- Benchmark Job Class Selection
- Compensation Competitiveness Policy
- Salary Structure Selection
- Job Evaluation Method-Salary Plan Linkage
- Draft Compensation Plan Review / Critique
- Total Compensation Points for Analysis
- Project Implementation Plan

2. Comprehensive Compensation Survey

We do not subscribe to or recommend the use of databases or data warehouses used or hosted by other firms! We will collect the complete pay plans from each of the County's comparators and build a custom survey database to ensure accuracy and completeness, unique to the County's job classifications.

a. ***Data Collection Protocol*** will be developed in consultation with the County's project leaders to determine which salary data elements to include, such as:

Base Salary Information

- Salary grade/step or open range salary plan structure
- Salary range structure Minimum, Midpoint, and Maximum
- Method of salary administration – longevity, performance, or skill

b. ***Benchmark Job Selection*** will be made by identifying County job classes common to its employment-competitive public and private employers in the immediate area and throughout the region or State, clearly identifiable, and representative of standard occupational job groups.

c. ***Comparator Employers Identification*** will be made in consultation with the County's Project Manager(s) and County Board. Criteria include their degree of competition to the County in obtaining and retaining high quality staff, their location in the County's traditional recruitment areas, and their organizational size and complexity.

d. ***Compensation Data Collection*** will be made by one or more of the following methods.

- Pre-survey contact with the selected comparator employers to solicit participation in the County's compensation survey(s)
- Extraction from the pay plans of designated public employers.
- Customized salary and additional total compensation and benefits survey requests for local governments and other public and private employers, distributed by mail, fax, and e-mail.
- As desired, additional data extraction from established salary surveys and commercial survey sources such as Watson Wyatt, ERI, etc.

e. ***Data Quality Control*** includes editing data for accuracy and proper matching to the County's survey benchmark jobs, and phone/fax/E-mail follow-ups for data clarification and to obtain comparators' benchmark job descriptions.

3. *Prevailing Rates Calculation*

We will consolidate the compensation data from all sources, enter the information into the ***EZ COMP™*** program, and compute the prevailing rates, inclusive of cost of living differentials, as the statistical mean of the survey data for each benchmark job class. Data will be projected forward from the date of collection to a common date relating to the County's salary plan year by the annual Prevailing Rate Increase Factor (PRI) applicable at that time.

4. *Compensation Competitiveness Comparison*

We will provide the County with charts comparing its current salary structures to those of the selected public and private comparator employers. We will calculate the extent that the County's offerings vary from the prevailing rates and practices of other relevant employers.

5. *Compensation Competitiveness Policy*

We will assist the County to select a compensation competitiveness policy which best fits its compensation strategy and financial resources, by providing fiscal impact estimates at various percentage relationships to the prevailing rates.

6. *Salary Plan Structure Development*

We will review the County's current employee agreements and wage plans and ***1)*** utilize the County's current wage plan structures to identify internally equitable and externally competitive salary ranges for each County job class or ***2)*** prepare alternative salary range structures and schedules for the County to select the best fit for its competitiveness strategy, with these optional criteria:

- Method of administration, i.e.: measured job performance, longevity, or skill
- Width of the salary ranges, grades, or broad bands, from Minimum to Maximum
- Varying salary range widths for FLSA non-exempt or exempt positions
- Open salary ranges for pay-for-performance or variable compensation plan
- If steps within the salary ranges, number of steps, percentage separation
- Number of salary ranges, grades, or broad bands in the salary schedule
- Percentage of separation between salary ranges, grades or broad bands
- Recognition for longevity, unique assignments, and special skill requirements
- Remuneration for required special licenses, certifications and registrations
- Linkage of performance evaluations to performance increase opportunities

7. *Salary Range Assignment Development*

We will assign each job classification to a salary range in the County's current or selected new salary structure on the basis of a combination of factors, including:

- the prevailing rates for the benchmark job classes
- its current relationship to similar or occupationally related job classes
- the 15% guideline for salary range separation between sequential job classes
- the 25% guideline for salary separation of a department head job class
- its quantitative evaluated internal job worth value (job evaluation points)

8. *Implementation Plan Development*

We will consult with the Human Resources staff and County Leaders on a plan for transition to the recommended plan, including a timetable for the principal activities, employee communication, impact on bargaining processes, and estimates of required financial resources.

F. *FINAL REPORTS AND PRESENTATIONS*

1. ***Draft and Final Report Preparation***

We will provide the County's project leader(s) with a draft of our report for review and critique, including the classification plan, FLSA designations, compensation market data, salary comparison tables, fiscal estimates, salary range listings, and implementation procedures. We will incorporate their critique into the development of a final report summarizing the project's findings, recommendations, and detailed description of the County's updated position classification and compensation plans.

2. ***Final Report Presentations***

We will conduct a workshop or formal presentation of our final report and recommendations to the County Board, County Officials, and employees.

3. ***EZ COMP™ Program Installation***

We will install our ***EZ COMP™*** program and project files on one of the Human Resources Department's computers and provide training to key staff in the maintenance and update of the classification and compensation plan.

Please see the illustrative ***EZ COMP™*** applications CD-ROM on the inside front cover of this proposal, and the program description booklet in the Appendix.

4. ***Implementation Warranty***

To ensure effective implementation of the new plan, we will analyze, evaluate, and provide a salary range recommendation for any new or changed job class, ***at no cost to the County*** for one year.

G. *ENSURING THE COUNTY'S SELF-SUFFICIENCY*

The County will be self-sufficient in all aspects of maintenance of the updated position classification and compensation plan through these services.

1. ***Procedure Manuals***

   - *PSPC Position Classification Procedure Guide*
   - *PSPC Salary Administration Procedure Guide*
   - *Jefferson County **EZ COMP™** Procedure Guide*

2. ***Training Workshop*** – for County staff in position classification, job evaluation, compensation surveys, and compensation plan design and administration.

3. ***Electronic Job Description Library*** – if requested, we will provide the County with all updated ADA/EEO-compliant job descriptions in hard copy and electronic library format for internal maintenance.

4. ***EZ COMP™*** – program and project files on one of the County's computers, a custom user's manual, and system training for key County and Human Resources staff.

5. ***Initial Year's Implementation Warranty Support*** – we will analyze, evaluate, classify, and provide a salary range recommendation for any new or changed position or entire job classification, ***at no cost to the County*** for one year.

H. EXTENSIVE EMPLOYEE INCLUSION AND COMMUNICATION

Very important factors for successful implementation of new or updated classification and compensation plans are ***1)*** extensive employee inclusion, and ***2)*** extensive employee communication. County officials and employees will participate in one or more of the following activities:

- Attending pre-project briefings and question and answer sessions
- Completing a Position Analysis Questionnaire (PAQ) describing their position
- Elaborating on their jobs in individual or group job information interviews (option)
- Requesting a second review of their position's occupational job classification
- Receiving information pamphlet/booklet describing the updated salary plan

I. MINIMAL COUNTY SUPPORT REQUIRED

We are completely self-sufficient in projects of this nature and do not require any substantive staff support from the County other than payroll data, and arrangements for group and individual meetings and interviews. We appreciate, but do not require, any office space, telephone, clerical assistance, computers, or office equipment. We will provide all data entry, data processing, duplicating, and related report preparation functions.

JEFFERSON COUNTY
PROPOSAL TO CONDUCT A CLASSIFICATION AND COMPENSATION STUDY

ESTIMATED PROJECT ELAPSED TIME CHART

	TASK NAME	ELAPSED WEEKS: 2	4	6	8	10	12+
1.	PROJECT COMMUNICATION, QUALITY ASSURANCE, PROJECT STATUS REPORTS						
2.	JOB INFO INTERVIEWS WITH STAFF, ORGANIZATIONAL DATA COLLECTION CLASSIFICATION RECOMMENDATIONS			*			
3.	UPDAT CLASS DESCRIPTIONS as needed; STAFF QUALITY ASSURANCE REVIEW; PRELIMINARY APPEALS PLANNING			*			
4.	RESOLUTION OF EMPLOYEE APPEALS TO RECOMMENDED CLASSIFICATIONS OF THEIR POSITIONS (as desired)						
5.	COMPENSATION SURVEY, BENCHMARK SELECTION, DATA COLLECTION, COMPARABILITY ASSURANCE REVIEW						
6.	PREVAILING RATES COMPUTATION, MARKET COMPETITIVENESS ANALYSIS, DRAFT COMPENSATION METHODOLOGY				*		
7.	SALARY RANGE ASSIGNMENTS ON BASIS OF INTERNAL EQUITY AND EXTERNAL COMPETITIVENESS; FINAL APPEALS						
8.	SALARY RANGE TABLES, FISCAL IMPACT ESTIMATES, REVIEW OF DRAFT PLANS WITH COUNTY OFFICIALS, DESIGNEE(S)					*	
9.	PREPARATION AND PRESENTATION OF FINAL REPORT TO COMMITTEES, HR, DEPARTMENT HEADS, ALL EMPLOYEES						
10.	*EZ COMP*™ INSTALLATION, COUNTY STAFF TRAINING ONE YEAR OF CLASS/COMP PLAN IMPLEMENTATION ASSISTANCE						

* Progress reviews with the County

PROPOSAL TO CONDUCT A CLASSIFICATION AND COMPENSATION STUDY FOR JEFFERSON COUNTY

COST PROPOSAL

PUBLIC SECTOR PERSONNEL CONSULTANTS

COST PROPOSAL

A. *PROJECT COST ESTIMATE*

We estimate that the project's total cost, including all fees for professional services and reimbursement for out-of-pocket expenses, ***will not exceed*** the indicated amounts.

Fixed Cost

The project includes a management and employee communication plan; partnership with the County's Human Resources Director, Committees, Boards, and project designee(s); occupational, organizational, and operational familiarization; Position Analysis Questionnaire (PAQ) and job analysis for all classifications; worksite job information interviews; position classification and job title recommendations for all employees and classifications; FLSA designations; as needed, updated ADA/EEO-compliant job descriptions; ***EZ COMP™***; internal equity and external competitiveness evaluation; compensation survey and competitiveness analysis; salary range recommendations; fiscal impact estimates and multiple implementation scenarios; updated classification and compensation plan and one year of classification and compensation plan implementation support for all included employees.	***$ 85,000***

B. *COST BREAKDOWN BY TASK*

- Project Planning and Employee Briefing Meetings	***$ 5,000***
- On-site Interviews with Incumbents of Each Job Classification	***$22,500 ****
- Position Classification, Job Evaluation, and Job Titling / Grouping Review	***$ 7,500***
- Job Description Reviews and Possible Updates / Revisions	***$15,000 ****
- Compensation Survey	***$ 20,000***
- Narratives, Draft Reviews, and Final Presentations	***$ 10,000***
- Appeals (if needed)	***$ 5,000***

**** see cost savings notes to follow – these items may be significantly less***

C. *FLEXIBLE WORK PLAN, NEGOTIABLE TOTAL COST, TERMS*

Our work plan is flexible and total project cost negotiable, and we will discuss, modify, add or delete, any work task to increase the project's responsiveness to the County's needs and financial resources. We do not require advance payment, and will provide the County with monthly invoices for the professional services provided and out-of-pocket expenses incurred during the month. We request that the County pay the invoices within thirty (30) days of their receipt.

PROPOSAL TO CONDUCT A CLASSIFICATION AND COMPENSATION STUDY FOR JEFFERSON COUNTY

ADDITIONAL INFORMATION

REDUCING PROJECT COST
SAMPLE CONTRACT

PUBLIC SECTOR PERSONNEL CONSULTANTS

COST SAVINGS OPTIONS

Our proposal includes options / variables for on-site desk audit interviews and updated job descriptions.

If we receive a Position Analysis Questionnaire (PAQ) for each included position, we may be able to reduce or limit the number of on-site interviews needed and still achieve high quality results.

Similarly, if not all included job descriptions need to be revised or newly developed, cost savings should also be realized for this project component.

PROFESSIONAL SERVICES AGREEMENT

This Agreement is entered into by the **City of Whitehall** ("the City"), 360 S. Yearling Road, Whitehall, Ohio 43213 and **Public Sector Personnel Consultants, Inc.** ("PSPC"), 1215 West Rio Salado Parkway Suite 109, Tempe, Arizona 85281 (National Office).

This Agreement is for PSPC to conduct a classification and compensation detailed below and in "Exhibit 1" to follow.

SCOPE OF SERVICES TO BE PROVIDED TO THE CITY

The project includes a management and employee communication plan; partnership with the City's Director of Human Resources and staff, City Manager, Council, and project designee(s); occupational, organizational, and operational familiarization; Position Analysis Questionnaire (PAQ) and job analysis for all classifications; optional worksite job information interviews; position classification and job title recommendations for all employees and classifications; FLSA designations; updated ADA/EEO-compliant job descriptions as needed; ***EZ COMP™;*** internal equity and external competitiveness evaluation; base compensation survey and competitiveness analysis; salary range recommendations; fiscal impact estimates and multiple implementation scenarios; updated classification and compensation plan and one year of classification and compensation plan implementation support for approximately 144 employees in 50+ job classifications.

PROJECT DURATION

The City and PSPC will partner to complete the study prior to September 1, 2012.

PROJECT COST AND PAYMENT

The total contract shall not exceed $ 20,000, inclusive of all reimbursable expenses and optional project add-ons, without further City approval and modification of this agreement. PSPC will provide the City with monthly invoices for services provided and out-of-pocket expenses incurred during the month. The City agrees to pay the invoices within thirty (30) days of their receipt.

SEVERABILITY

That should any word, sentence, paragraph, subdivision, clause, phrase or section of this agreement, as amended hereby, be adjudged or held to be void or unconstitutional, the same shall not affect the validity of the remaining portions of said agreement, which shall remain in full force and effect.

VENUE

The laws of the State of Ohio shall govern the interpretation, validity, performance and enforcement of this Agreement. The parties agree that this Agreement is performable in Franklin County, Ohio and that exclusive venue shall lie in Franklin County, Ohio.

TERMINATION

This Agreement may be terminated by either party with 30 days written notice.

ASSIGNMENT

The assignment of this agreement by any party is prohibited without the prior written consent of the other Party.

AMENDMENT

Any amendment of this Agreement must be in writing and will be effective if signed by the authorized representatives of the Parties.

NOTICES

Any notices under this agreement will be effective if transmitted to a Party by confirmed telecopy or via US Postal Service, postage prepaid, certified, to the address of the Party indicated below:

CITY
Director of Human Resources
City of Whitehall
360 S. Yearling Road
Whitehall, Ohio 43213

PSPC
Matthew Weatherly, President
Public Sector Personnel Consultants, Inc.
1215 W. Rio Salado Parkway #109
Tempe, Arizona 85281

NO THIRD PARTY BENEFICIARIES

Nothing in this Agreement, express or implied, is intended to confer any rights, benefits, or remedies under or by reason of this agreement upon person or entity, other than the City and PSPC.

APPROVED FOR
THE CITY OF WHITEHALL

By: _____
(Signature)
Name: _____

Title: _____

Date: _____

APPROVED FOR
PUBLIC SECTOR PERSONNEL CONSULTANTS

By: _____
(Signature)
Name: Matthew Weatherly

Title: President

Date: _____

COMMUNICATING THE PROJECT TO THE EMPLOYEES

PUBLIC SECTOR

PERSONNEL CONSULTANTS

CLASSIFICATION AND COMPENSATION PROJECT PROCEDURE GUIDE SERIES

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COMMUNICATING THE PROJECT TO THE EMPLOYEES

The factor that is most important in the development and effective implementation of a new or updated position classification and/or compensation plan is not the technical process, or even the amount of salary increases. It is the extent to which employees understand the process by which the plan was developed, and their acceptance that it was a logical and fair process.

To assist you in determining and implementing the best systematic approach to the effective communication of the compensation plan for your organization, we have provided this booklet, parts of which are adaptations from the booklet: "COMMUNICATING COMPENSATION PROGRAMS- An Approach to Providing Information to Employees" from the American Compensation Association.

We have divided this section of the Guide into Pre-Project, Mid-Project and Post-Project segments.

A. PRE-PROJECT EMPLOYEE COMMUNICATION

The maximum amount of information concerning the reasons for the project should be provided at the earliest possible date. There will already be a number of rumors floating around since some employees will have heard about the RFP preparation, consultant selection process, and project approval by the Council/Board.

Following are several pre-project communication activities which are essential to the successful conduct of a classification and/or compensation project.

1. Letter/Memo From the Chief Executive Officer

We suggest that every employee receive a letter or memo from the chief executive officer announcing the project (Figure 1), indicating the reasons for the project, its scope and process, the extent of employee participation, and a guarantee that no one's salary amount will be reduced as a consequence of the project.

2. Project Briefings by Our Consultants

We will conduct a briefing for every employee to explain the scope of the project, summarize the process we will utilize, explain their roles in the project, and respond to questions. A listing of the most frequently asked questions and our responses follows on page 5. At the completion of the Q and A period we will distribute the Position Description Questionnaire (PDQ) and provide an item-by-item explanation.

The briefings last 30 to 45 minutes, and can be scheduled at one-hour intervals. To ensure that attendance does not exceed the facility's capacity, and that the departments can send their employees in shifts, we suggest the following:

- *Schedule a minimum of two sessions, and more depending upon the number of employees to be briefed and the facility's capacity.*
- *Control attendance by scheduling alphabetically by employees' last names such as A-E 9:00am-10:00am; F-J 10:00am-11:00am, etc.*

3. Employee Opinion Survey on Salary Administration (OPTIONAL)

If you have requested it as a part of the total project, we will conduct our standard Confidential Employee Opinion Survey on Salary Administration which will provide the employees the opportunity to communicate to you their primary concerns and opinions regarding the current classification and/or compensation plan. Participation is voluntary.

The survey is a multiple-choice questionnaire with space for comments. To maintain confidentiality, we administer the questionnaire immediately after the PDQ explanation and receive the completed questionnaires directly from the employees. We will give you extra questionnaires and self-addressed return envelopes to our office for employees who want to participate but could not attend the briefings.

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CITY OF _____
Office of the City Manager

Memorandum

TO: All City Employees, Supervisors, and Department Heads

FROM: _____ , City Manager **DATE:** 4/10/00

SUBJECT: Position Classification and Compensation Study

I am very pleased to inform you that the City has contracted with a highly qualified outside consultant firm, Public Sector Personnel Consultants *(PSPC)*, to update our position classification and pay system to ensure that your position's classification reflects its duties and responsibilities, and that its salary range assignment is internally equitable and competitive within our employment markets.

PSPC consultants will conduct briefings on the project for all employees, supervisors and department heads on Monday, April 14. Attendance is mandatory, and you will be informed of the location and time for your briefings. The consultants will also distribute and explain a questionnaire to permit you to describe your duties and responsibilities in your own words. You will have one week to complete the questionnaire and return it to your supervisor.

PSPC consultants will be on-site during the later part of May to conduct individual job information interviews with representative incumbents of every job classification at their worksite, to provide you with an additional opportunity to explain the scope and complexity of your position. *PSPC* will provide recommendations as to the correct occupational job classification and title for every position, and update our job descriptions from the information you have provided on your questionnaire and during the worksite interview. ***REMINDER:*** It is the position that is being studied and classified, not the employee.

PSPC will also conduct a salary survey of the public and private employers in the local, regional, and national employment markets where we compete to obtain and retain high quality staff, and recommend a salary plan that is competitive with salaries paid for similar occupations in those employment markets. We cannot promise any salary increases, ***however, no salary will be reduced as a consequence of this project.***

We anticipate that the project will be completed within approximately 120 days, and you will be notified of any actions affecting your position's classification and salary range as soon as the City Council has reviewed the recommendations and adopted the updated plans.

I am very pleased that the City Council has authorized this study to update the internal equity an external competitiveness of our position classification and salary plan. Please see the Human Resources staff if you have any questions.

(Figure 1) *Memorandum from the chief executive officer announcing the project*

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Several important considerations if you have selected this service.

- *Extend the scheduling of the briefing sessions intervals from one hour to 1 ½ hours.*
- *Provide a facility that is set up in classroom style with tables, or chairs with writing arms, so that the employees can complete the questionnaires.*
- *Remind the employees to bring pencils or pens to the meeting, and provide these items for the employees who forget.*

An essential component of an employee opinion survey process is feedback of the survey results, to maintain positive employee relations. Since it is the nature of this type of survey to solicit negative comments, you should carefully consider whether your organization's culture is such that you can provide negative survey results feedback to the employees and the elected or appointed officials and Council/Board members.

We will provide a report summarizing the statistical and narrative results, including all of the employee comments verbatim. We will modify the written comments to maintain the confidentiality of the respondents and their departments, delete references to named individuals or their jobs titles, and remove offensive language.

The method and extent of distribution and dissemination of the opinion survey report will be up to you.

4. Employee Communication Task Force

You can leverage pre-project and progress communication through a committee or task force of employees representing the various departments, occupational groups, and/or employee associations. We can provide more intensive and detailed briefings for these individuals, whose role it will be to disseminate this information to their respective departments and employee groups.

This task force can also be utilized for suggestions regarding procedural aspects of the project, such as determination of the employers to be included in the external compensation survey, and serving as the job evaluation task force if a point-factor method is to be developed and/or used to establish the internal job worth ranking of your various job classifications.

B. MID-PROJECT EMPLOYEE COMMUNICATION

We suggest a minimum of a monthly communication to the employees on the status of the project. There will be a normal level of anxiety among the employees which is to be expected when outsiders are making recommendations regarding job titles and pay ranges. Mid-project communications will reinforce each employee's importance to the organization, emphasize the positive nature of the project, and lessen unwarranted anxieties and concerns.

Following are several mid-project communication activities that will contribute to the successful conduct and implementation of the classification and/or compensation project.

1. Employee Newsletter Articles

If you have an established printed or video employee newsletter, we will provide you with information for articles that indicate the project activities completed to date, and the anticipated activities for the following month.

2. Project Information Bulletins

As an alternative to or supplement for newsletter articles, we suggest a special monthly or occasional bulletin to inform the employees of project activities completed to date, and the anticipated activities for the following month. Such a bulletin should be distributed to all employees, perhaps as a payroll stuffer, posted on bulletin boards, and disseminated by internal e-mail.

3. Employee Communication Task Force

This group should receive a monthly briefing on the project status, and be given the opportunity to ask questions about project issues that concern them or the employees. This dialogue will provide the employees with the latest and correct information, and provide important feedback to the project consultants which may be useful in increasing the project's quality and acceptance of the results.

4. Progress Reports for the Council/Board

We recommend that you provide a monthly summary of the project's progress to the Council or Board, so that they remain informed and committed, and to assure them that they will make final decisions regarding compensation policy and financial expenditures.

5. Project Inquiry "Hot-Line"

There may be occasions where this technique will be helpful in providing information, dispelling rumors, and obtaining additional information on employee concerns about the project. These "hot lines" take the form of a specific dedicated phone number, or an e-mail address, for the duration of the project, which may be answered by a Human Resources representative during working hours and an answering machine during other times, or an answering machine or e-mail address which is periodically checked for messages and responses provided to the callers.

C. POST-PROJECT EMPLOYEE COMMUNICATION

Once the recommended position classification and/or compensation plan has been adopted by the Council/Board, you will be able to provide a large amount of information to the employees, in a variety of formats. Not all of the following activities will be appropriate, or affordable, for all circumstances. They are provided for you to select, or develop, the communication activities which are best suited to your organization.

1.Copies or Extracts From the Final Report

We suggest that you prepare for employee perusal a number of copies of our final report on the recommended classification and/or compensation plan, after its adoption by the Council/Board. They could be made available for review in the Human Resources and/or line departments' offices. You will probably receive a request for a copy of the report from the media.

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The report's table with the employee names and their actual salary amounts should be removed. Some of the material is technical and could be misinterpreted, such as market comparisons, and salary grade/range allocations by multiple salary policy formulae if you utilize a point-factor job evaluation method, and you may want to consider publishing only the new salary grade/range-per job class listings.

2. Workshop for Supervisors

We recommend that you conduct a workshop for supervisors on all aspects of the new position classification and/or compensation plan, for the purpose of preparing them to explain the new plan and respond to questions will be a major factor in the employees' positive attitude towards the new plans. Supervisors should then conduct employee meetings to explain the new plan and answer questions concerning its scope and effect.

This workshop is especially important if the new plan contains a new salary schedule, with or without in-grade steps, and/or the method of salary administration is to be changed from longevity to pay-for-performance. The approach selected for the initial year's implementation must be thoroughly explained and understood. The extent to which the supervisors understand and support the new plan will be the essential factor to its successful implementation.

3. Classification and Compensation Plan Pamphlet

We recommend that you prepare an distribute to all employees, supervisors and managers, a pamphlet explaining the new position classification and/or compensation plan. The employees will obtain a greater depth of understanding, and retain the information for a longer period, from such written material.

The pamphlet can be used in a the supervisory workshops, post-project employee briefings, and new employee orientation sessions. If a new performance evaluation system was a component of your project, a description of that system's linkage to the pay plan should be included in the pamphlet. A separate pamphlet should be prepared explaining the scope and process of the new performance evaluation plan.

4. Employee Briefings

Briefings for all employees, conducted by the Human Resources staff, is one of the best methods to ensure that everyone obtains accurate information about the new plans, and obtains answers to questions from an expert source. We recommend a series of small group meetings to establish the best atmosphere for communication and understanding.

These meetings provide an excellent opportunity to distribute materials describing the new plans, such as a classification and compensation pamphlet, updated employee handbook, and updated personnel policy manual pages. If a video describing the new plans has been produced, that would be the introductory part of these briefings.

5. Salary Administration Video

A professionally produced video is not always necessary or affordable for very organization. It is however a very powerful tool for communicating the scope and components of the new plan in modern media which ascribes a high degree of state-of-the-art quality to the new plan. It is also included in new employee orientations. We have provided you with a sample copy of such a video.

The salary administration video is best suited for organizations with employees at many locations and on varying shifts, who can be shown the video at times that are convenient to their work hours. This video need not be costly if your organization has an internal video production capability or access to an educational institution or television station who might produce video as a public service.

6. Update Employee Handbook and Personnel Policy Manual

We recommend that you update the sections of your Employee Handbook and Personnel Policy Manual that describe the position classification and compensation plan to reflect any changes required by the new plan. Those updated pages are excellent handouts at the supervisory workshop and employee briefings.

7. Individual Salary Plan Implementation Statements

The employees need to be informed of the impact of the new plan on t heir base salary amount and salary opportunity. We recommend that each employee be provided with a personalized statement including the following information.

- *Effective date of the new plan, and date of salary change if different*
- *Job class title of their position*
- *Salary grade/range number to which their position's job class is allocated*
- *Minimum, Midpoint, and Maximum amounts of the salary grade/range.*
- *Salary amount prior to the effective date of the new plan*
- *Amount of increase to Minimum of the new grade/range, if applicable*
- *New salary amount according to the initial implementation protocol*
- *Relationship of new salary to the Midpoint of the grade/range (comparatio)*
- *Merit increase opportunity at various levels of future job performance*
- *Amount of supplemental pay, such as for longevity, assignments, certifications*
- *FLSA status and hourly rate for overtime*

THE QUESTIONS MOST COMMONLY ASKED BY EMPLOYEES

Following are the questions that employees most frequently ask us during the employee project briefing meetings, and our responses.

Q: *1. Who are we going to be compared to for salaries?*

A: If the client has made this determination prior to the briefing meetings, we provide the names and locations of the employers to the employees. We also indicate that not all jobs will be surveyed at all of the comparator employers, and that

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some may be compared only to local employers, while other jobs may be compared on a regional or national basis.

If the client has not yet determined who the comparator employers will be, we tell the employees that the process of identifying the employers to be surveyed depends to a great extent on where the client is currently obtaining the majority of its employees and for which occupations. A second factor is the identification of employers to whom the client regularly loses current employees.

Q: *2. What will the Council/Board do with your report?*

A: We uniformly respond that we do not know what the client's Council/Board will do with our report. We tell the employees that in the over 1,000 times that we have provided compensation services that we have experienced 98% implementation, and we have no indication that this project will be an exception.

We credit our 98% implementation record to the fact that, in our experience, employers do not plan projects, retain consultants, raise employee expectations, and expend funds, with the intention of doing nothing. The only modification we are sometimes requested to make to our original recommendations is the option for a multi-year implementation plan if the cost to where the client wishes to place it's salary policy exceeds the available funds.

Q: *3. Will we get to see a copy of the report, and when?*

A: Yes. We recommend that when the final report has been adopted by the Council/Board that it be made public and that extra copies be made available for perusal by the employees and department heads. The reports may not contain the tables with specific salary amounts recommended for each employee, as that is confidential, but it will include the tables indicating the salary range dollars recommended for each job classification.

Q: *4. When will the study be completed?*

A: We provide this information in general terms, such as: "within ninety days."

Q: *5. Will you make recommendations regarding (longevity, cost-of-living, benefits, etc.)*

A: We tell employees if a benefits analysis and which salary administration items are included in the scope of the project.

Q: *6. How much are you being paid for this study, and wouldn't it be better if that money was given to the employees?*

A: We anticipate this question by dividing the total project cost by the number of employees and providing the employees with a per-employee amount.

For example, if a project costs $45,000 for 450 employees, the per employee cost would be $100. We tell the employees that if the client distributed the project cost to them, each employee would receive a one-time payment of $100, minus taxes, instead of a possible raise from the study, which might be more substantial, and which would be paid every year.

Q: *7. What will happen if the survey shows that a job classification is priced over the market rate?*

A: The job classification will be allocated to the salary range that most closely matches the prevailing rate at the salary competitiveness policy selected by the employer, which may be lower (or the same, or higher) than the current salary range/grade. This will not impact the salary amount paid to an incumbent if that amount is within or above the new salary range for his/her position's job class.

Q: *8. What will happen if an employee's salary amount exceeds the Maximum of the new salary range/grade for their position's job class?*

A: No one's salary will be reduced as a direct consequence of this project. There may be a few employees whose current base salary exceeds the Maximum of the new salary range/grade recommended for their position's job classification. In such instances, the employee's base salary amount will be not be reduced, but the amount will be frozen until such time as their position's job class is re-allocated to a higher salary range/grade whose Maximum exceeds their current base salary amount.

Q: *9. Will salaries be increased?*

A: That is a determination to be made by the Council/Board on the basis of their compensation philosophy, competitiveness policy, and the organization's financial resources. We merely make recommendations. The final decisions are 100% within the authority of the Council/Board. There is no guarantee that any salaries will be increased.

Depending upon the Council/Board's final policy determination, a new salary plan may result in uneven increases during the initial implementation year, resulting from the need to bring the salaries of all individuals to the Minimum of the salary range/grade, take into account each individual's current position in the new salary range and possibly their varying length of service.

Q: *10. Who will be selected for the job information interviews, and how is the selection made?*

A: Unless every employee is to receive a job information interview at their work site, the minimum number of interviews is one representative incumbent of each occupational job classification. We

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will make the interview selection at random. If an employee is the only incumbent of a job class, that person will be scheduled for an interview.

Q: *11. What if my supervisor does not agree with what I wrote on the Position Description Questionnaire (PDQ)?*

A: Supervisors are not permitted to change anything that an employee has written on their PDQ. The purpose of the supervisory review of the PDQ is to ensure that its content accurately reflects the duties and responsibilities performed by the incumbent, to the extent that the consultants can readily determine its occupational classification. If the supervisors do not agree with any part of the PDQ content, they may comment and indicate their opinions.

In virtually all of the instances where we see supervisory comments (approx. 2% - 5% of the PDQs) they indicate that the employee has forgotten to mention an important item, or they may differ on the percentages of the position the employee has allocated to its major functions. No one is an expert in completing a PDQ about their position, and it is quite common to forget an essential item.

We will communicate with both the employee and supervisor in the rare instances of significant difference of opinion regarding a position's job content, and form an independent opinion.

Q: *12. Will there be changes in job titles and classifications?*

A: That is a distinct possibility. Our task is to make sure that each position's job classification and the job class titles reflect current duties and responsibilities. It is possible that some positions may be re-allocated to a different job classification if their duties and responsibilities are now more commensurate with another than their current job class.

We may recommend that some job class titles be changed to more accurately reflect their occupations, to account for more or less job classes within a sequential group, or to recognize new occupational assignments.

Q: *13. What if I do not agree with your classification of my position?*

A: Our response will depend on whether the client's rules and/or the scope of the project permit employee appeals to their position's recommended classification. If they do not, we will indicate that every position's classification will be reviewed with the respective department head for errors and that changes may be made in our initial recommendations.

If appeals are permitted, we inform the employees that they will be notified by their employer of our initial occupational job classification recommendation for their position, after the quality control reviews with the department heads. If they feel that we have made an error and that significant job content information has been overlooked, they may complete a form and request that we conduct a second review and notify the client of our final recommendation for each appealed position.

NOTE: We stress to the employees that the appeal process relates only to the occupational job classification and titles of positions, not salary range/grade assignments.

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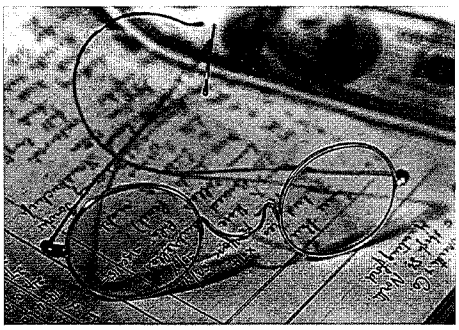

EZ COMP™ PROGRAM DESCRIPTION

PUBLIC SECTOR

PERSONNEL CONSULTANTS

$32,486 $72,674 $51,750
$64,893 $42,045
$128,803

CLASSIFICATION AND COMPENSATION PROJECT PROCEDURE GUIDE SERIES

EZ COMP™ PROGRAM DESCRIPTION

As the name implies, EZ COMP™ Is an easy method of developing and maintaining the databases which comprise a new or updated base salary plan. This booklet describes the principal files that are interrelated during a salary plan project.

EZ COMP™ is an interactive series of files and tables, which are described in this booklet. We do not charge for our software which we update periodically for our clients at no cost.

The trademark name EZ COMP™ describes both the PSPC consultants' process of compiling the data files and the product which is installed on the client's computer upon the project's completion.

EZ COMP™ TABLES AND CHARTS

The program includes the following standard files, tables, and charts.

Primary Client Data File
1-Schematic of Occupational Job Classes
2-Index of Current to New Job Titles
3-Position Allocation Register
4-External Prevailing Rates Comparison
A-Sources of External Data Table
$-Permanent Salary Range Schedule
B-Job Content Evaluation Profiles*
C-Internal Equity Analysis Scattergram*
D-Current Salary Practice Lines of Central Tendency (LCT)*
E-External Prevailing Rates LCTs*
F-LCTs Comparison Chart*
5-Per-Job Class Salary Range Assignment Table-Class Order
6-Per-Job Class Salary Range Assignment Table-Range Order
7-Non-Benchmark Linkage Table
8-Per-Position Compa-Ratio Table
9-Fiscal Impact Estimate Table
10-Implementation Cost Analysis
Optional Additional Tables

**for salary plans utilizing point-factor job evaluation*

PRIMARY CLIENT DATA FILE

Primary Client Data File consists of all the combined per-position and per-employee data accumulated and created during the project. It is initially established from data provided by the client, such as:

Employee Name	Current Job Class Title	Base Salary Amount
Department	Job Class Code	Salary Range Number
Initial Hire Date	EEO Designation	$ Range Midpoint
Performance Score	FLSA Designation	$ Range Min/Max

Additional per-position information added or superimposed on the current data by the PSPC consultants during the project may include:

New Job Class Title	New Job Class Code	Salary Range Number
$ Range Minimum	$ Range Midpoint	$ Range Maximum
Job Evaluation Points	Benchmark Status	$ Policy Group
Amount to Minimum	Implementation Amount	New Salary Amount
Above Maximum	Certification Pay Code	Assignment Pay Code
Compa-ratio	Amount to Midpoint	Supervisory Differential

TABLE 1 - SCHEMATIC OF OCCUPATIONAL JOB CLASSES

Schematic of Occupational Job Classes is a file established at the completion of the job analysis and position classification phase of the project, with all of the organization's job classes, designating:

Job Class Series	Job Class Groups
Job Class Titles	Job Class Codes
FLSA Designation	EEO Designation

This file will be "stripped" of job titles and class codes for other *EZ COMP*™ files.

Class Code	Occupational Job Families and Job Classes
1400	Public Works Series
	Facilities Maintenance and Craft Group
1431	Maintenance Supervisor
1432	Parks Supervisor
1433	Senior Skilled Craft Specialist
1434	Skilled Craft Specialist
1435	Maintenance Technician
1436	Maintenance Technican Assistant
1437	Parks Maintenance Specialist

TABLE 2 - INDEX OF CURRENT TO RECOMMENDED JOB CLASSES

Index of Current to Recommended Job Classes is an alphabetical listing of all job classes currently used by the client and the recommended disposition of each of those job classes and titles. Current data is from the payroll, class specifications and/or job descriptions, classification plan and PDQs. New data includes job class title and transaction codes.

D = Deleted J = New Job Class
M = Merged with other Job Class
N = No Change T = Title Modification
S = Split into Several Classes

Transaction Codes:
M = Merge Into Other Class
T = Title Modification
D = Delete Class Title
S = Split into Two or More Classes
N = No Change
J = New Job Class

Current Job Class	New Job Class	Trans Code
Superintendent of Printing	Printing Supervisor	T
Support Services Project Mgr.	Delete	D
Survey Party Chief	Survey Party Chief	N
Surveyor I	Surveyor	M,D
Surveyor II	Surveyor	S,N
	Utility Locator	J
Switchboard Operator	Clerical Assistant	M,D
Systems Analyst	Systems Analyst	N

TABLE 3 - POSITION ALLOCATION REGISTER

Position Allocation Register strips the following per-position information for the Primary Client Data File:

Current Job Class Title
Name of Incumbent
Department

and adds the following information from Table 1, based on the PSPC consultants' determinations as to which job class the position is allocated:

Recommended Job Class Title Job Class Code
Transaction Code: N = No Change R = Reclassification; T = Title Modification

Transaction Codes: N = No Change
R = Reclassification T = Title Modification

Incumbent	Current Job Class	New Job Class	Trans Code
Moss, R	Accountant	Accountant	N
Warner, K	Accountant	Programmer	R
Plummer, J	Accountant	Accountant	N
Favre, B	Senior Accountant	Senior Accountant	N
Ditka, M	Senior Accountant	Senior Accountant	N
Ruud, E	Accounting Clerk III	Accounting Clerk	T
Drukker, H	Accounting Clerk III	Accounting Clerk	T

TABLE 4 - EXTERNAL PREVAILING RATES COMPARISON

External Prevailing Rates Comparison compares The client's current salary structure Midpoint for each of its salary survey benchmark job classes from the Primary Data File to the external prevailing rate indicating the dollar and percentage variance of the client's rates to the prevailing rates.

Benchmark Job Class	Current Midpoint	Aged Survey Midpoint	Variance	
			$	%
Public Works Director	$49,686	$77,269	-$27,583	-35.70%
Police Chief	$49,686	$77,102	-$27,416	-35.56%
Human Resource Director/City Clerk	$37,080	$57,062	-$19,982	-35.02%
Police Lieutenant	$35,310	$42,344	-$7,034	-16.61%
Building Inspector	$32,028	$33,438	-$1,410	-4.22%
Human Resource Specialist	$23,898	$24,961	-$1,063	-4.26%
Laborer	$21,678	$20,721	$957	4.62%
Comptroller	$37,080	$32,465	$4,615	14.22%

TABLE A - SOURCES OF EXTERNAL SALARY DATA

Sources of External Salary Data identifies the source of each rate comprising the external prevailing rate for the client's salary survey benchmark job classes. This table may be updated annually to compute the new prevailing rate for each benchmark job class.

If the external data was obtained through a special salary survey questionnaire, this table will indicate, for each benchmark job class, the name of every employer who reports a comparable job to the benchmark, their job class title, and current salary data.

If the external data was extracted from an existing salary survey report which identifies the employers and their data, this table will indicate the same information as in the previous paragraph. If the report provided only merged data for each of their benchmarks matched to the client's benchmark, this table will only indicate the name of the survey, the survey benchmark job title, and the salary data.

TABLE $ - PERMANENT SALARY RANGE SCHEDULE

Permanent Salary Range Schedule indicates the Salary Range Number, Minimum, Midpoint and Maximum amounts for each salary range in the client's base salary plan. If the client utilizes a grade/step system, this table indicates the Salary Grade Number and the number and amount of each step within every salary grade.

Salary Range	Minimum	Midpoint	Maximum
63	$60,093	$75,116	$90,139
64	$61,595	$76,994	$92,393
65	$63,135	$78,919	$94,703
66	$64,713	$80,892	$97,070
67	$66,331	$82,914	$99,497
68	$67,990	$84,987	$101,984
69	$69,689	$87,112	$104,534

TABLE B - JOB CONTENT EVALUATION PROFILES *

Job Content Evaluation Profiles lists all of the job class titles and codes from Table 1, the evaluated job levels and points for each of the compensable factors, and the total points for every job class.

TABLE 5 - PER JOB CLASS SALARY RANGE ASSIGNMENT TABLE (CLASS ORDER)

Per Job Class Salary Range Assignment Table (Class Order) assigns each job class to a salary range within the Permanent Salary Range Schedule (Table $). The process is different for salary plans based on direct market pricing than for those based on quantitative evaluated job content.

Class Code		Occupational Job Families and Job Classes	-- Recommended --			
			Salary Range	Minimum	Midpoint	Maximum
1400		**Public Works Series**				
		Facilities Maintenance and Craft Group				
1431	*	Maintenance Supervisor	59	$54,441	$68,051	$81,662
1432	*	Parks Supervisor	59	$54,441	$68,051	$81,662
1433		Senior Skilled Craft Specialist	35	$30,099	$37,624	$45,149
1434		Skilled Craft Specialist	29	$25,954	$32,443	$38,932
1435	*	Maintenance Technician	30	$26,603	$33,254	$39,905
1436		Maintenance Technican Assistant	26	$24,101	$30,127	$36,152
1437		Parks Maintenance Specialist	25	$23,513	$29,392	$35,270

* Salary Survey Benchmark

For plans based on direct market pricing, this table is initially created by assigning each benchmark job class to the salary range on Table $ whose Midpoint amount most closely matches the external prevailing rate from Table 4. Non-benchmark job classes are assigned to their salary ranges by reference to the Non-Benchmark Linkage Table (Table 7). Flexibility for subsequent internal equity adjustments to Table 5 is provided on the basis of professional judgment.

For plans based on quantitative job evaluation, this table is created by multiplying the job points for each job class from Table B by the client's salary competitiveness policy formula for each primary job group from Table F. The process then looks up Table $ for the Midpoint amount on the Permanent Salary Schedule closest to the product of the calculation, which designates the proper salary range.

TABLE 6 provides the same information in low to high salary range order.

Class Code		Occupational Job Classes	-- Recommended --			
			Salary Range	Minimum	Midpoint	Maximum
1714		Director of Planning, Zoning, and Building	65	$60,610	$75,762	$90,915
1133	*	Internal Auditor	65	$60,610	$75,762	$90,915
1112		Assistant City Administrator	64	$59,131	$73,914	$88,697
1620	*	Director of Recreation	63	$57,689	$72,111	$86,534
1279	*	Fire Chief	63	$57,689	$72,111	$86,534
			62	$56,282	$70,353	$84,423
1243	*	Assistant Chief of Police	61	$54,909	$68,637	$82,364

* Salary Survey Benchmark

TABLE 7 - NON-BENCHMARK LINKAGE TABLE

Non-Benchmark Linkage Table for non-quantitative plans, indicates the class titles of the job classes which are not salary survey benchmarks, the class title of the benchmark or reference job classes to which they are linked. The process automatically adjusts the salary range for the non-benchmark class by the current salary range differential when the salary of its linked benchmark or reference job class is adjusted on Tables 5 and 6.

This table is to be utilized as a guide during annual salary plan updates, permitting non-benchmark job classes to be adjusted by the same number of salary ranges as the salary survey benchmark job class to which they have been linked.

Non-Benchmark Job Title	Benchmark Job Title
Accounting Manager	Accountant
Adult & Info Services Manager	Librarian
Building Monitor	Office Assistant
Building Maintenance Supervisor	Building Maintenance Worker
Building Permit Specialist	Executive Secretary
Bus Driver	Light Equipment Operator
Business Manager	Accountant

TABLE 8 – PER-POSITION COMPA-RATIO TABLE

Employee Name	Dept Code	New Job Class	Current Salary	– Recommended –				Compa-Ratio	$<Min	$<Mid	$>Max
				Salary Range	Minimum	Midpoint	Maximum				
Simon, N	A	Administrative Assistant	$21,330	26	$24,101	$30,127	$36,152	70.80%	$2,771	$8,797	$0
Taylor, J	A	Director of Real Property	$85,685	67	$66,331	$82,914	$99,497	103.34%	$0	$0	$0
Garcia, J	A	Chief Deputy of Operations	$56,815	46	$39,493	$49,366	$59,239	115.09%	$0	$0	$0
Crow, S	A	Program Manager	$51,385	44	$37,590	$46,987	$56,385	109.36%	$0	$0	$0
Iomi, A	M	Medical Investigator	$69,716	70	$71,432	$89,289	$107,147	78.08%	$1,716	$19,573	$0
Reidle, J	M	Forensic Technical Specialist	$77,123	55	$49,321	$61,651	$73,982	125.10%	$0	$0	$3,141
Young, N	M	Principal Secretary	$24,354	26	$24,101	$30,127	$36,152	80.84%	$0	$5,773	$0

Per-Position Compa-Ratio Table provides the following information, which is added to the Primary Client Data File, from Table 3, $, and 5.

Job Class Title	Incumbent's Name	Incumbent's Current $
Job Class Code	Salary Range Number	Amount Below Minimum
Department	Salary Range Midpoint	Amount Below Midpoint
Compa-Ratio	Salary Range Min/Max	Amount Above Maximum

The Compa-Ratio (short for Comparative Ratio) is a calculation which expresses the percentage relationship of the incumbent's current base salary amount to the Midpoint of the salary range for their position's job class.

TABLE 9 – FISCAL IMPACT ESTIMATE TABLE

Fiscal Impact Estimate Table provides, on a department or cost center basis, the estimated annualized cost to bring the salaries of all employees to the Minimum of the salary range for their position's job class. The table combines the department designations from the Primary Client Data File with the total amounts of current salaries and salaries below the Minimum from Table 8, for alternative salary competitiveness policies.

Number of Employees	287
Total Payroll	$10,684,333
Number of Employees Below Minimum	77
As % of total employees	26.83%
Total $ below Minimum	$121,099
As % of total payroll	1.13%
Average amount below Minimum	$1,573

OPTIONAL TABLES

EZ COMP™ can be expanded to include and actively integrate any number of custom-developed tables, or tables constructed from various combinations of the standard tables, such as the following:

- Initial Implementation Protocol Guide
- Initial Implementation Compression Tempering Guide
- Merit or Longevity Salary Increase Guide
- Performance Reviews Due/Overdue Report
- Departmental, Job Class, or Longevity Compa-Ratio Report
- Supplemental Pay Table for Special Assignments, Certification, License or Language Proficiency
- Longevity Recognition Supplement
- Supervisory Differential
- Trainee on In-Training Rates
- Out-of-Class or Acting Capacity Differentials
- Individual or Group Incentives

NOTE: Not all of the preceding tables will be present in the EZ COMP™ for every salary plan.

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	Job Title	End Date	Start Date		Years	Months
Hoffman, Jean	Communications Operator	5/5/2012	3/19/1979	33.20	33.00	2.00
Droster, Betty	Nutrition Site Manager	5/11/2012	5/13/1996	16.00	16.00	0.00
Strese, John	Deputy	4/1/2012	9/2/1985	26.60	26.00	7.00
Mason, Joan	Receptionist	6/1/2012	6/30/2003	8.90	8.00	11.00
				0.00	0.00	0.00
				0.00	0.00	0.00
				0.00	0.00	0.00
				0.00	0.00	0.00
				0.00	0.00	0.00
				0.00	0.00	0.00
				0.00	0.00	0.00
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#14

HR0210 **AMENDMENT AND MAINTENANCE OF THE CLASSIFICATION PLAN.** The annual budget, adopted in November, shall show all positions authorized for the various departments. Whenever one or more new positions are under consideration for possible establishment or whenever, because of any revision in organization or methods, a significant change of the duties or responsibilities of any existing position is to be made which may require the reclassification of such position, or whenever a new class is created to which any position may more appropriately be assigned, or whenever, because of the abolishment or combination of any existing positions or classes, an amendment to the classification plan is required, or whenever a position is vacant for more than one year, the following procedures shall be observed:

A. The department head or the County Administrator shall report the significant facts relating to such possible changes in the classification plan in writing to the Human Resources Committee in the manner prescribed.

B. The Human Resources Committee, upon written request of the County Administrator, upon written request of any employee, or upon its own initiative, may initiate an inquiry into the classification of any position. Written requests for changes in the classification plan shall be submitted to the Human Resources Department by April 1 of each year, with the exception of requests initiated by the County Administrator, which may be reviewed at any time. The County may use a consultant to consider such proposed changes and shall review the classification plan and present any recommended changes to the Human Resources Committee. These recommendations will be presented to the Board of Supervisors with the proposed County budget for the succeeding year. Reclassifications, grade reassignments or job title changes shall be effective January 1 of the succeeding year, unless otherwise recommended and approved by the Board of Supervisors. Employees requesting reclassification shall be informed of the consultant's recommendation and Human Resources Committee action by the Human Resources Department. (Am. Ord. 2008-14, 07-08-08).

C. No change in the status of a current employee or employment of a new employee (other than on an emergency help basis) may be effected until the classification plan change has been approved by the Board of Supervisors. No change in the pay plan shall be made until the classification plan revision requiring a pay plan change has been approved by the Board. (Am. Ord. 2011-31, 03-13-2012).

RECLASSIFICATION COVER FORM

This is a request for a reclassification.

Employee Name (s): Mary Wollet

Department/Facility: Jefferson County Health Department

Subdepartment/Unit: Jefferson County WIC (Women, Infants and Children)
Current Job Title: WIC Director/Nutritionist

Reclassification Requested by: _____ (if someone other than employee completing the JDQ)

Why is this position being requested for a reclassification? In a brief paragraph, please include the following information: the duties that are *substantially* new to your position AND how long have you been performing these tasks.

Several new duties have been added to the WIC Director/Nutritionist position:

- ROSIE computer system tester—2008
- Head Start nutrition consultant—2008
- Lead testing program manager—2009
- Breastfeeding Peer Counselor program—provide oversight and direction, added 3 new employees—2010
- Provide clinic experiences for dietetics and nursing students—2006
- ASQ (Ages and Stages Questionnaire) developmental testing—2011
- Participate in CYSHCN (Children and Youth with Special Health Care Needs) grant program—2010-2012
- Participate in several WIC workgroups: New food package nutrition education, lead testing, WIC information delivery system, new food package grocery store video--2009

Please state the position or person previously responsible for the duties listed above.

I added all these duties to the Director/Nutritionist position.

Briefly list the duties that you are no longer doing as a result of new tasks being assigned.

I continue to perform all duties listed in the November 2006 position description.

Please state the person or position now responsible for these tasks.

Mary Wollet

RECLASSIFICATION COVER FORM

This is a request for a reclassification.

Employee Name (s): Scott Fossum

Department/Facility: MIS

Subdepartment/Unit: 8502

Current Job Title: Systems/Analyst

Reclassification Requested by: _____ (if someone other than employee completing the JDQ)

Why is this position being requested for a reclassification? In a brief paragraph, please include the following information: the duties that are *substantially* new to your position AND how long have you been performing these tasks.

1. Increase in languages and skills required to handle position. Along with AS/400 applications and java based systems. We now develop web based systems using PHP, Javascript, Jquery. 4 years
2. Expanded Database administrative responsibilities. We have to create and develop new relational databases in both DB2 and MySQL. 5 years
3. Web site Development and Administation. Need to be able to create and maintain multiple websites for the County(Public Site, Employee Site, Fair Park, and Fair site) 4 years
4. Expanded training and guidance to website developers. Need to be able to work with multiple users (20) in creation of their departments websites. 4 years
5. Design work. Webpage layout to graphic layouts for banners using Photoshop or other image editing software 3 years

Please state the position or person previously responsible for the duties listed above.

1. Duty was changed/increased do to technology advances and county user's needs.
2. Expanding technology needs in courage more development with MySQL
3. Web site used to be done by the networking department
4. This training was needed; do to changes in management of the web site.
5. Not done in past.

RECLASSIFICATION COVER FORM

This is a request for a reclassification.

Employee Name (s): Timm Punzel

Department/Facility: Highway Department

Subdepartment/Unit: _____

Current Job Title: Assistant Superintendent

Reclassification Requested by:_____ (if someone other than employee completing the JDQ)

Why is this position being requested for a reclassification? In a brief paragraph, please include the following information: the duties that are *substantially* new to your position AND how long have you been performing these tasks.

Since taking this position the job duties have changed and duties have been added. With more of the Operations Manager's time being consumed by other projects, he has added more responsibilities onto my work load which includes creating a new Safety Program both for the employee's and our entire facility to be in compliance with OSHA. He has also directed me to bid work with other municipalities and agencies along with attending Town Board Meetings at night and various other meetings outside of normal working hours. I have also taken on the responsibility of working directly with or WisDOT Representative. These added duties have been taking place the past two years.

Please state the position or person previously responsible for the duties listed above.

Operations Manager along with the Maintenance Superintendent

Briefly list the duties that you are no longer doing as a result of new tasks being assigned.

Presently there are not duties that I no longer do, by which I have to multi-task and spend more time every day at work or after hours to get the tasks done.

Please state the person or position now responsible for these tasks.

I am still responsible for all duties.

#15

ORDINANCE NO. 2012-____

Recreating the Civil Service Ordinance for full-time and part-time Deputy Sheriffs, Detectives, Sergeants, Captains and Chief Deputy

THE COUNTY BOARD OF SUPERVISORS OF JEFFERSON COUNTY DOES HEREBY ORDAIN AS FOLLOWS:

The Civil Service Ordinance (Ordinance No. 2010-21) is hereby repealed and recreated as follows to incorporate the ability to hire external (not currently Jefferson County employees) candidates for the Chief Deputy position:

SECTION 1. PURPOSE. This ordinance is intended to bring qualified persons into county law enforcement work by a system of competitive examinations and to ensure continuity in county law enforcement work by virtue of a permanent appointment as deputy sheriff under a civil service ordinance as set forth in sec. 59.26(8) and Chapter 63, Wisconsin Statutes.

SECTION 2. COMMISSION.

A. There is hereby established a County Civil Service Commission with the duties, functions and authority set forth in sec. 59.26 and Chapter 63 of the Wisconsin Statutes.

B. Such Commission shall consist of five (5) members, all of whom shall be legal residents of Jefferson County. Appointments shall be made on the basis of recognized and demonstrated interest in, and knowledge of the problems of civil service. No person holding any elected or appointed public position or office of any sort in Jefferson County government shall be appointed thereon.

C. The Jefferson County Administrator shall appoint members of the Commission, subject to confirmation by the County Board. The office of a commissioner shall be deemed vacant upon the happening of any of the following events:
   1. Death of the incumbent.
   2. Resignation of the incumbent in writing.
   3. Removal of the incumbent by the County Board.
   4. Ceasing to be a resident of Jefferson County.

D. In the month of December of each year immediately preceding the expiration of the term of office of any such commissioner, the County Administrator shall appoint one member of such Commission to hold office for the term of five (5) years from the first day of January next succeeding the appointment and until a successor is elected and is qualified. Appointment to vacant positions shall be for the remainder of the original term.

E. Each member of the Commission shall take and file the official oath.

F. Each member of the Commission shall receive such compensation as the County Board shall determine.

G. The Commission shall organize and elect a chairperson whose term of office shall be one (1) year and shall elect a secretary whose term of office shall be one (1) year. Such chairperson and secretary shall

serve until election of a successor. The secretary shall cause the minutes of the proceedings of the Commission to be preserved in a proper record book.

H. Nothing herein shall be construed as to affect the appointment or terms of the present commissioners.

SECTION 3. DUTIES OF THE COMMISSION. It shall be the duty of the Commission:

A. To prepare and publish such rules and regulations to carry out the provisions of this ordinance as may be necessary to secure the best law enforcement service for the County.

B. To receive applications and conduct examinations of applicants for positions in the Sheriff's Office of Jefferson County with such frequency as may be necessary to maintain an eligibility list sufficient to meet the needs of the Sheriff's Office.

SECTION 4. RECRUITMENT.

A. The following classifications are created within the Jefferson County Sheriff's Office: Chief Deputy, Captain, Sergeant, Detective, and Deputy Sheriff.

B. In addition to requirements under Section 6, Promotions, no person shall be eligible to apply for or be appointed to the positions covered by this ordinance after November 1, 2010, unless:

1. The applicant is a citizen of the United States.

2. The applicant has a minimum of sixty (60) college credits or has three (3) years experience as a paid full-time law enforcement officer (civilian or military).

3. Persons employed in the classifications subject to this ordinance shall meet the training standards set by the Department of Justice, Wisconsin Law Enforcement Standards Training Board as a Wisconsin Certified Law Enforcement officer within 12 months of employment.

4. The applicant is at least eighteen (18) years of age.

5. There is no specific measurement set for height and weight relationships. They shall be in proportion and shall be considered by the medical examiners in determining the applicant's physical fitness for the position. In addition, all new hire Deputy Sheriff applicants shall be required to pass a physical agility test.

6. The applicant shall not have been convicted at any time or any place of a felony, unless the judgment or conviction has been reversed or a complete pardon has been granted.

7. Visual acuity must be corrected to 20/20.

8. The applicant must possess a valid Wisconsin driver's license at the time of appointment.

C. Deputy Sheriff positions. Notice of the date, time and place for conducting written examinations and notice as to the open Deputy Sheriff positions, the necessary qualifications and where applications may be filed shall be published in a the County's official newspaper. Such notice shall also be given to schools within this state which confer police science degrees as well as law enforcement websites designed for advertising openings/hiring processes for law enforcement personnel, such as the Department of Justice's WILENET website.

D. Detective. At least fourteen (14) days prior to the commencement of the examination process, the Sheriff shall post a notice on the bulletin board, which notice shall identify the opening and classification, along with the salary range. Such notice shall contain the names of those persons within the Sheriff's Office eligible to write the examination. Eligible sworn staff intending to participate in the examination process shall so indicate in writing by placing their signatures next to their names on the eligibility list.

E. Supervisory positions of Sergeant and Captain. At least fourteen (14) days prior to the commencement of the examination process, the Sheriff shall post a notice on the bulletin board, which notice shall identify the supervisory and/or administrative opening and classification, along with the salary range. Such notice shall contain the names of those persons within the Sheriff's Office eligible to write the examination. Eligible sworn staff intending to participate in the examination process shall so indicate in writing by placing their signatures next to their names on the eligibility list.

F. Chief Deputy Position – In addition to meeting the posting requirements for other Supervisory positions, at least thirty (30) days prior to the commencement of the examination process, the Sheriff shall publish a notice of the Chief Deputy vacancy containing the required qualifications for the position in the county's official newspaper, other state and regional newspapers, as well as law enforcement websites designed for advertising openings/hiring processes for law enforcement personnel.

G. All candidates for full-time positions in the classifications of Chief Deputy, Captain, Sergeant, Detective, and Deputy Sheriff shall file a written application with the Jefferson County Human Resources Department upon forms designated. Vacancies in classifications other than those set forth hereinabove shall be filled pursuant to the Jefferson County Personnel Ordinance and shall not be covered by this ordinance.

H. Jefferson County is an Equal Opportunity Employer. No person employed by the Jefferson County Sheriff's Office, nor any person seeking admission thereto, shall be discriminated against contrary to the provisions of Ch. 111, Wisconsin Statutes.

SECTION 5. EXAMINATION.

A. The Commission shall conduct competitive written and oral examinations. The Commission shall establish passing grades for each phase of examination prior to each phase thereof.

B. The first stage of the testing procedure will be a written examination, administered and proctored by the Commission or its designee. The test used shall be the current test certified for use by the Commission or its designee. The tests used must be validated and job-related.

C. The Sheriff's Office shall, upon request of the Commission, conduct a background investigation to determine the character and reputation of applicants. This will be done by the Sheriff's Office Detective Bureau for new hire applicants.

D. The Commission may refuse to examine a candidate or, after examination, to certify a candidate as eligible who (1) is found to lack any of the established requirements for the position for which that person has applied, or (2) has intentionally made a false statement in any material fact, or (3) is addicted to the habitual use of intoxicating beverages, narcotics or dangerous drugs, or (4) has ever been convicted of a felony without a full pardon, or (5) any other sufficient fact which, because of business necessity, would be a detriment to holding the position of Deputy Sheriff.

E. The Commission shall establish a certified eligibility list of candidates who meet the prerequisites of the position, and who have scored a passing grade on the written and oral examinations. The Commission may invite representatives of other law enforcement agencies to participate in the oral interview process. Invitees' scores will be given to the Civil Service Commission for discussion and consideration in accordance with the Commission's rules. Invited law enforcement guests are neutral third parties chosen by their respective departments to participate in the process at the request of the Jefferson County Civil Service Commission. Invitees should be individuals that by rank or assignment have a level of expertise that is beneficial in the final scoring process.

F. Placement on the certified eligibility list for initial appointment shall be by overall score, weighing the scores on the written and oral examinations, 40 percent each, with the remaining 20 percent taken from the applicants file information. For promotional factor weights, see Section 6 (B)(1). Preference points shall be given to veterans of any wars of the United States as provided by sec. 63.08(1)(f) and 230.16 (7), Wisconsin Statutes.

G. Every candidate on the eligibility list must, prior to appointment, submit to and pass a psychological, physical and drug test to be conducted by such physician or physicians as may be designated by the Commission. Such physician shall submit a statement that the applicant is of sound health and has the physical ability to perform the duties, with or without reasonable accommodation, of the position to which he seeks appointment. Cost of such examination shall be borne by Jefferson County. The Commission may also implement a physical agility test for prospective new hires.

H. The Sheriff, in his or her discretion, may employ an assessment center process as an additional tool for evaluation of the top candidates for both new and promotional positions as certified by the Commission.

SECTION 6. PROMOTIONS. Promotions and divisional reassignment shall be made according to this ordinance:

A. **Promotion Eligibility**. Those eligible for promotion shall be limited as follows:

1. Chief Deputy. To take the examination for the position of Chief Deputy, the candidate must have not less than ten (10) years of service with a Sheriff's Office, and not less than five (5) years supervisory experience therein. The candidate must have a Bachelor's degree or the equivalency of 120 college credits. The Sheriff's Office shall, upon request of the Commission, conduct a background investigation to determine the character and reputation of applicants. By the direction and decision of the Sheriff, the background investigation will be completed by a representative of the Human Resources Department, an outside consultant, another law enforcement agency or a combination thereof.

2. Captain. To take the examination for promotion to Captain, the candidate must have not less than seven (7) years of service with the Sheriff's Office and not less than three (3) years supervisory experience therein.

3. Sergeant. To take the examination for promotion to Sergeant, a candidate must have not less than five (5) years of service with the Sheriff's Office.

4. Detective. To take the examination for promotion to Detective, the candidate must have not less than three and one-half (3-1/2) years of service with the Sheriff's Office.

B. **Education – Experience Credit.**

1. An Associate's degree from an accredited college/university shall be deemed the equivalent of six (6) months of service.

2. A Bachelor's degree from an accredited college/university shall be deemed the equivalent of 18 months (1-1/2 years) of service.

3. These equivalents may be used for a successful promotion to a position enumerated in Section 6 (A)(1-4). Only one equivalent may be used on a one time basis only.

C. **Written Examinations.**

1. The process to consider a Sergeant for assignment to a different division or for the promotions to the positions of Chief Deputy, Captain, Sergeant and Detective will be scored as follows: The written test and the oral test shall be given thirty (30) percent weight each. Twenty (20) percent of the final grade shall be based on the job evaluations and other material contained within the employee's personnel file, and another twenty (20) percent of the final score shall be from the "Applicant Profile Questionnaire."

2. Written examinations for the position of Sergeant will be specific for the patrol, detective, support services, and jail divisions. If an individual already holding the rank of Sergeant desires to be eligible for a Sergeant's position in another division, that Sergeant must take the written examination for the Sergeant's vacancy in that division. The number of applicants advancing from the written test to the Civil Service Commission interview is unlimited, as long as a passing score has been received.

3. Written test scores will be valid for a period of 6 months. Test scores kept on file during this time period are division specific (patrol, detective, support services and jail). If a Sergeant's position becomes available in another division, an existing Sergeant must take the written test for that specific division.

4. Written test scores and the scored "Applicant Profile Questionnaire" will <u>not</u> be available to the Commission prior to oral interviews. The Commission shall notify applicants of their respective scores by mail.

SECTION 7. APPOINTMENTS.

A. Whenever a vacancy is to be filled, the Sheriff shall make appointments to the position from the list of applicants who are certified as eligible by the Commission. The Commission shall certify to the Sheriff the names of all persons with the three highest scores on the eligibility list, from which the Sheriff shall make his selection. If more than one vacancy is to be filled, the Commission may certify the names of all persons at the next highest score if the Commission concludes that the three highest scores do not provide a sufficiently large field of eligible candidates.

B. Appointments by the Sheriff shall be made within twenty (20) days after receipt of the certified list from the Commission.

C. Deputy Sheriffs appointed according to the provisions of this ordinance shall hold office on good behavior and shall not be dismissed from such office or demoted or suspended except as provided in this ordinance.

D. All full-time Deputy Sheriffs whose classifications are covered by this ordinance are granted civil service status which shall continue without further examination or appointment, except examination will be required when said Deputy Sheriff seeks a position which constitutes a promotion to a higher classification.

E. The number of full-time Deputy Sheriffs in the classification covered by this ordinance shall be determined annually by the Jefferson County Board.

F. Appointments made pursuant to this ordinance shall be probationary for a period of twelve (12) months and may be terminated by the Sheriff and the Commission acting jointly at any time during such probationary period.

SECTION 8. DISCIPLINARY PROVISIONS.

A. Any member of the Jefferson County Sheriff's Office covered by this ordinance may be suspended, demoted or discharged in accordance with sec. 59.26(8)(b) Wisconsin Statutes.

B. The grievance committee required by sec. 59.26(8)(b), Wis. Stats. shall consist of the members of the Human Resources Committee of the Jefferson County Board.

SECTION 9. GENERAL PROVISIONS.

A. No person holding the position of Deputy Sheriff under this ordinance shall, during the hours when he is on duty, engage in any form of political activity calculated to favor or improve the chances of any political party or any person seeking or attempting to hold political office, nor shall he engage in or appear at any political activity, gathering or profit-making function while off duty and in uniform. This provision is not intended to abridge or interfere with the rights of deputies to engage in political activities during off duty hours, but rather is designed to avoid the appearance of the support of the Jefferson County Sheriff's Office for any political candidate, position or cause.

B. In the event a Deputy Sheriff is elected Jefferson County Sheriff, his appointment as a Deputy Sheriff shall terminate upon his executing and filing the official bond and official oath as Sheriff, unless prior thereto, he requests in writing from the Commission a leave of absence during his term of office as Sheriff. If such leave of absence is granted, such deputy shall be reinstated in the classification of Deputy Sheriff upon his completion of his duties as Sheriff.

C. Policies, rules, regulations and duties of the personnel in the Department shall be established by the Sheriff and incorporated in the Department's policy manual.

D. The Sheriff shall prepare Department rules for the general administration and efficient operation of the Department. Such rules shall be known as the "Department Rules", and Deputy Sheriffs shall be required to conduct themselves in accordance with such rules. Failure so to do shall be cause for discipline.

E. The rights of a Deputy Sheriff in military service of the United States government shall be governed by applicable federal and state laws.

F. Pursuant to sec. 59.26(8)(d), Wisconsin Statutes, the County Board has the power to repeal this ordinance at any time by a vote of three-fourths of the members elect.

SECTION 10. SEVERABILITY. The provisions of this ordinance are severable and provisions or sections which may hereinafter be declared to be illegal or unconstitutional shall be declared repealed and the remainder shall not be affected thereby.

SECTION 11. All other ordinances in conflict with this ordinance are hereby repealed.

SECTION 12. The pay range previously applicable to the position of Lieutenant shall be applicable to the position of Captain.

SECTION 13. EFFECTIVE DATE. This ordinance shall be effective after passage and publication as provided by law.

AYES _____
NOES _____
ABSTAIN _____
ABSENT _____
VACANT _____

Requested by
Human Resources Committee

June 12, 2012

Terri Palm-Kostroski: 2-8-12; 3-27-12; 5-1-12; 5-30-12
Chief Deputy Jeff Parker: 2-7-12; 4-16-12

CIVIL SERVICE ORDINANCE

SECTION 1. PURPOSE. This ordinance is intended to bring qualified persons into county law enforcement work by a system of competitive examinations and to ensure continuity in county law enforcement work by virtue of a permanent appointment as deputy sheriff under a civil service ordinance as set forth in sec. 59.26(8) and Chapter 63, Wisconsin Statutes.

SECTION 2. COMMISSION. (a) There is hereby established a County Civil Service Commission with the duties, functions and authority set forth in sec. 59.26 and Chapter 63 of the Wisconsin Statutes.

(b) Such Commission shall consist of five (5) members, all of whom shall be legal residents of Jefferson County. Appointments shall be made on the basis of recognized and demonstrated interest in, and knowledge of the problems of civil service. No person holding any elected or appointed public position or office of any sort in Jefferson County government shall be appointed thereon.

(c) The Jefferson County Administrator shall appoint members of the Commission, subject to confirmation by the County Board. The office of a commissioner shall be deemed vacant upon the happening of any of the following events:

(1) Death of the incumbent.

(2) Resignation of the incumbent in writing.

(3) Removal of the incumbent by the County Board.

(4) Ceasing to be a resident of Jefferson County.

(d) In the month of December of each year immediately preceding the expiration of the term of office of any such commissioner, the County Administrator shall appoint one member of such Commission to hold office for the term of five (5) years from the first day of January next succeeding the appointment and until a successor is elected and is qualified. Appointment to vacant

positions shall be for the remainder of the original term.

(e) Each member of the Commission shall take and file the official oath.

(f) Each member of the Commission shall receive such compensation as the County Board shall determine.

(g) The Commission shall organize and elect a chairperson whose term of office shall be one (1) year and shall elect a secretary whose term of office shall be one (1) year. Such chairperson and secretary shall serve until election of a successor. The secretary shall cause the minutes of the proceedings of the Commission to be preserved in a proper record book.

(h) Nothing herein shall be construed as to affect the appointment or terms of the present commissioners.

SECTION 3. DUTIES OF THE COMMISSION. It shall be the duty of the Commission:

(a) To prepare and publish such rules and regulations to carry out the provisions of this ordinance as may be necessary to secure the best law enforcement service for the County.

(b) To receive applications and conduct examinations of applicants for positions in the Sheriff's Office of Jefferson County with such frequency as may be necessary to maintain an eligibility list sufficient to meet the needs of the Sheriff's Office.

SECTION 4. APPLICATIONS. (a) All candidates for full-time positions in the classifications of Chief Deputy, Captain, Sergeant, Detective, and Deputy Sheriff shall file a written application with the Jefferson County Human Resources Department upon forms designated. Vacancies in classifications other than those set forth hereinabove shall be filled pursuant to the Jefferson County Personnel Ordinance and shall not be covered by this ordinance.

(b) No person shall be eligible to apply for or be appointed to the positions covered by this ordinance after November 1, 2010, unless:

(1) The applicant is a citizen of the United States.

(2) The applicant has a minimum of sixty (60) college credits or has three (3) years experience as a paid full-time law enforcement officer (civilian or military).

(3) The applicant is at least eighteen (18) years of age.

(4) There is no specific measurement set for height and weight relationships. They shall be in proportion and shall be considered by the medical examiners in determining the applicant's physical fitness for the position.

(5) The applicant shall not have been convicted at any time or any place of a felony, unless the judgment or conviction has been reversed or a complete pardon has been granted.

(6) Visual acuity must be corrected to 20/20.

(7) The applicant must possess a valid Wisconsin driver's license at the time of appointment.

SECTION 5. EXAMINATION. (a) The Commission shall conduct competitive examinations, written and oral, for candidates who apply for positions covered by this ordinance, including persons who are currently deputy sheriffs but who wish to compete for higher classification. The Commission shall establish passing grades for each phase of examination prior to each phase thereof.

(b) The first stage of the testing procedure will be a written examination, administered and proctored by the Commission or its designee. The test used shall be the current test certified for use by the Commission or its designee. The tests used must be validated and job-related.

(c) The Sheriff's Office shall, upon request of the Commission, conduct a background investigation and to determine the character and reputation of applicants. This will be done by the Sheriff's Office Detective Bureau for new hire applicants.

(d) The Commission may refuse to examine a candidate or, after examination, to certify a candidate as eligible who (1) is found to lack any of the established requirements for the position for which that person has applied, or (2) has intentionally made a false statement in any material fact, or (3) is addicted to the habitual use of intoxicating beverages, narcotics or dangerous drugs, or (4) has ever been convicted of a felony without a full pardon, or (5) any other sufficient fact which, because of business necessity, would be a detriment to holding the position of Deputy Sheriff.

(e) The Commission shall establish a certified eligibility list of candidates who meet the prerequisites of the position, and who have scored a passing grade on the written and oral examinations. The Commission may invite representatives of other law enforcement agencies to participate in the oral interview process. Invitees' scores will be given to the Civil Service Commission for discussion and consideration in accordance with the Commission's rules. Invited law enforcement guests are neutral third parties chosen by their respective departments to participate in the process at the request of the Jefferson County Civil Service Commission. Invitees should be individuals that by rank or assignment have a level of expertise that is beneficial in the final scoring process.

(f) Placement on the certified eligibility list for initial appointment shall be by overall score, weighing the scores on the written and oral examinations, 40 percent each, with the remaining 20 percent taken from the applicants file information. For promotional factor weights, see Section 6 (b). Preference points shall be given to veterans of any wars of the United States as provided by sec. 63.08(1)(f) and 230.16 (7), Wisconsin Statutes.

(g) Every candidate on the eligibility list must, prior to appointment, submit to and pass a medical and physical test to be conducted by such physician or physicians as may be designated by the Commission. Such physician shall submit a statement that the applicant is of sound health and has the physical ability to perform the duties of the position to which he seeks appointment. Cost of such examination shall be borne by Jefferson County. The Commission may implement a physical abilities test for prospective new hires.

(h) Notice of the date, time and place for conducting written examinations and notice as to the open Deputy Sheriff positions, the necessary qualifications and where applications may be filed shall be published in a newspaper of county-wide circulation. Such notice shall also be given to schools within this state which confer police science degrees.

SECTION 6. PROMOTIONS. (a) Promotions and divisional reassignment shall be made according to this ordinance.

(b) The process to consider a Sergeant for assignment to a different division or for the promotions to the positions of Chief Deputy, Captain, Sergeant and Detective will be scored as follows. The written test and the oral test shall be given thirty (30) percent weight each. Twenty (20) percent of the final grade shall be based on the job evaluations and other material contained within the employee's personnel file, and another twenty (20) percent of the final score shall be from the "Applicant Profile Questionnaire." The Jefferson County Human Resources Department will score the objective questionnaire according to pre-determined guidelines. A member of the Sheriff's Office Administration will be present during this scoring to answer any questions that Human Resources staff may have.

(c) Written examinations for the position of Sergeant will be specific for the patrol, detective, support services, and jail divisions. If an individual already holding the rank of Sergeant desires to be eligible for a Sergeant's position in another division, that Sergeant must take the written examination for the Sergeant's vacancy in that division. The number of applicants advancing from the written test to the Civil Service Commission interview is unlimited, as long as a passing score has been received.

(d) Written test scores will be valid for a period of 6 months. Test scores kept on file during this time period are division specific (patrol, detective, support services and jail). If a Sergeant's position becomes available in another division, an existing Sergeant must take the written test for that specific division.

(e) Written test scores and the scored "Applicant Profile Questionnaire" will <u>not</u> be available to the Commission prior to oral interviews. The Commission shall notify applicants of their respective scores by mail.

(f) Promotion Eligibility. Those eligible for promotion shall be limited as follows:

(1) Chief Deputy. To take the examination for promotion to Chief Deputy, the candidate must have not less than ten (10) years of service with the Sheriff's Office, and not less than five (5) years supervisory experience therein. The candidate must have a Bachelor's degree or the equivalency of 120 college credits.

(2) Captain. To take the examination for promotion to Captain, the candidate must have not less than seven (7) years of service with the Sheriff's Office and not less than three (3) years supervisory experience therein.

(3) Sergeant. To take the examination for promotion to Sergeant, a candidate must have not less than five (5) years of service with the Sheriff's Office.

(4) Detective. To take the examination for promotion to Detective, the candidate must have not less than three and one-half (3-1/2) years of service with the Sheriff's Office.

(g) Education – Experience Credit. (1) An Associate's degree from an accredited college/university shall be deemed the equivalent of six (6) months of service.

(2) A Bachelor's degree from an accredited college/university shall be deemed the equivalent of 18 months (1-1/2 years) of service.

(3) These equivalents may be used for a successful promotion to a position enumerated in (1), (2) or (3) of Section (d). Only one equivalent may be used on a one time basis only.

(h) At least fourteen (14) days prior to the commencement of the examination process, the Sheriff shall post a notice on the bulletin board, which notice shall identify the supervisory and/or administrative opening and classification, along with the salary range. Such notice shall contain the names of those persons within the Sheriff's Office eligible to write the examination. Eligible sworn staff intending to participate in the examination process shall so indicate in writing by placing their signatures next to their names on the eligibility list.

SECTION 7. APPOINTMENTS. (a) Whenever a vacancy is to be filled, the Sheriff shall make appointments to the position from the list of applicants who are certified as eligible by the Commission. The Commission shall certify to the Sheriff the names of all persons with the three highest scores on the eligibility list, from which the Sheriff shall make his selection. If more than one vacancy is to be filled, the Commission may certify the names of all persons at the next highest score if the Commission concludes that the three highest scores do not provide a sufficiently large field of eligibles.

(b) The Sheriff, in his or her discretion, may employ an assessment center process as an additional tool for evaluation of the top candidates as certified by the Commission.

(c) Appointments by the Sheriff shall be made within twenty (20) days after receipt of the certified list from the Commission.

(d) Deputy Sheriffs appointed according to the provisions of this ordinance shall hold office on good behavior and shall not be dismissed from such office or demoted or suspended except as provided in this ordinance.

(e) All full-time Deputy Sheriffs whose classifications are covered by this ordinance are granted civil service status which shall continue without further examination or appointment, except examination will be required when said Deputy Sheriff seeks a position which constitutes a promotion to a higher classification.

(f) The number of full-time Deputy Sheriffs in the classification covered by this ordinance shall be determined annually by the Jefferson County Board.

(g) Appointments made pursuant to this ordinance shall be probationary for a period of twelve (12) months and may be terminated by the Sheriff and the Commission acting jointly at any time during such probationary period.

SECTION 8. DISCIPLINARY PROVISIONS. (a) Any member of the Jefferson County Sheriff's Office covered by this ordinance may be suspended, demoted or discharged in accordance with sec. 59.26(8)(b) Wisconsin Statutes.

(b) The grievance committee required by sec. 59.26(8)(b), Wis. Stats. shall consist of the members of the Human Resources Committee of the Jefferson County Board.

SECTION 9. GENERAL PROVISIONS. (a) No person holding the position of Deputy Sheriff under this ordinance shall, during the hours when he is on duty, engage in any form of political activity calculated to favor or improve the chances of any political party or any person seeking or attempting to hold political office, nor shall he engage in or appear at any political activity, gathering or profit-making function while off duty and in uniform. This provision is not intended to abridge or interfere with the rights of deputies to engage in political activities during off duty hours, but rather is designed to avoid the appearance of the support of the Jefferson County Sheriff's Office for any political candidate, position or cause.

(b) In the event a Deputy Sheriff is elected Jefferson County Sheriff, his appointment as a Deputy Sheriff shall terminate upon his executing and filing the official bond and official oath as Sheriff, unless prior thereto, he requests in writing from the Commission a leave of absence during his term of office as Sheriff. If such leave of absence is granted, such deputy shall be reinstated in the classification of Deputy Sheriff upon his completion of his duties as Sheriff.

(c) Policies, rules, regulations and duties of the personnel in the Department shall be established by the Sheriff and incorporated in the Department's policy manual.

(d) The Sheriff shall prepare Department rules for the general administration and efficient operation of the Department. Such rules shall be known as the "Department Rules", and Deputy Sheriffs shall be required to conduct themselves in accordance with such rules. Failure so to do shall be cause for discipline.

(e) The following classifications are created within the Jefferson County Sheriff's Office: Chief Deputy, Captain, Sergeant, Detective, and Deputy Sheriff.

(f) No person employed by the Jefferson County Sheriff's Office, nor any person seeking admission thereto, shall be discriminated against contrary to the provisions of Ch. 111, Wisconsin Statutes.

(g) The rights of a Deputy Sheriff in military service of the United States government shall be governed by applicable federal and state laws.

(h) Pursuant to sec. 59.26(8)(d), Wisconsin Statutes, the County Board has the power to repeal this ordinance at any time by a vote of three-fourths of the members elect.

(i) Persons employed in the classifications subject to this ordinance shall meet the training standards set by the Wisconsin Law Enforcement Standards Board.

SECTION 10. SEVERABILITY. The provisions of this ordinance are severable and provisions or sections which may hereinafter be declared to be illegal or unconstitutional shall be declared repealed and the remainder shall not be affected thereby.

SECTION 11. All other ordinances in conflict with this ordinance are hereby repealed.

SECTION 12. The pay range previously applicable to the position of Lieutenant shall be applicable to the position of Captain.

SECTION 13. EFFECTIVE DATE. This ordinance shall be effective after passage and publication as provided by law.

Adopted: 12/14/10 (Ord. 2010-21)
Published: 12/16/10

#16

Notice of Amendment to the Summary Plan Description

For

For Group Dental Benefits with Delta Dental of Wisconsin, Inc.

This Notice of Amendment is part of the Summary Plan Description issued by your Plan Sponsor. If the provisions of this Notice of Amendment and the Summary Plan Description do not agree, the provisions of this Notice of Amendment apply.

Please be advised that effective on the date of your plan's next renewal on or after January 1, 2010, the Summary Plan Description for your dental plan will amend the qualifiers for the term "Dependent" pursuant to a Wisconsin law mandate effective January 1, 2010:

The following language hereby replaces the current language under and including the heading entitled **Covered Dependents** contained in the Summary Plan Description:

"**Covered Dependents**

1. Your lawful spouse;

2. Your unmarried children, including step and adopted children and children placed for adoption with the Covered Employee, who satisfy all of the following criteria:

   (a) The child is less than 27 years of age, regardless of student status; and

   (b) The child is not eligible for coverage under a group dental benefit plan that is offered by the child's employer and for which the amount of the child's premium is not greater than the premium amount for coverage as a Dependent under this plan.

3. Notwithstanding 1. and 2. above, the Covered Employee's adult unmarried dependent children, including step and adopted children and children placed for adoption with the Covered Employee may be covered under this plan if the adult child satisfies all of the following criteria:

   (a) The adult child is a full-time student, regardless of age; and

   (b) The adult child satisfies the requirement under 2. (b), above; and

   (c) The adult child was called to federal active duty in the National Guard or in a reserve component of the U.S. armed forces while the child was attending, on a full-time basis, an institution of higher education; and

(d) The adult child was under the age of 27 when called to federal active duty; and

(e) The adult child re-enrolled as a full-time student within 12 months of returning from active duty.

4. The child of an unmarried child is covered until the child reaches age 19, or age 23 if a full-time student.

5. Unmarried dependent children age 17 and over who are incapable of supporting themselves because of physical or mental incapacity that began prior to their 17th birthday or the date you became eligible for this dental plan.

Dependents in military service are not covered by this dental plan.

Dependents no longer meeting these requirements because of divorce or separation from a Covered Employee or because a dependent is no longer considered a Covered Dependent, may elect to continue coverage. Please see the **Federal Continuation Provision (COBRA)** section in your Summary Plan Description.

Plan Sponsor may require that an enrollee or Covered Employee seeking coverage of a dependent child provide written documentation, initially and annually thereafter, that the dependent child satisfies the criteria for coverage under this plan.

This Notice of Amendment will not affect any of the terms, provisions or conditions of the Summary Plan Description except as stated herein."

Delta Dental of Wisconsin, Inc.

THIS AMENDMENT IS PART OF THE SUMMARY PLAN DESCRIPTION REFERENCED HEREIN AND SHOULD BE KEPT WITH THAT DOCUMENT.

FREQUENTLY ASKED QUESTIONS

IT'S YOUR CHOICE OPEN ENROLLMENT PERIOD

The "It's Your Choice" Open Enrollment period is the new annual opportunity for eligible employees and annuitants to select one of the many health plans offered by the State Group Health Insurance Program. Today, there are more than 18 different health plans to choose from.

The following list contains some of the most commonly asked questions about the enrollment period. You can also find information about key terms in the *Glossary* section at the back of this Guide.

NEW BENEFITS AND ELIGIBILITY CHANGES

1. **What is the It's Your Choice Open Enrollment period?**

   The It's Your Choice Open Enrollment period is an opportunity to change plans, change from family to single coverage and enroll if you had previously deferred coverage. It is offered only to employees, annuitants and surviving spouses and dependents who are eligible under the State of Wisconsin Group Health Insurance Program. Previously, employees and annuitants who deferred coverage were eligible to enroll by serving a preexisting condition waiting period.

2. **What are the new Dependent Eligibility changes?**

   Effective January 1, 2012, state law terminates coverage for adult children at the end of the month in which they turn age 26. This aligns with the age limit in federal law. For detailed information on which dependents are eligible, see the *It's Your Choice: Reference Guide, Frequently Asked Questions* section on Dependent Eligibility.

3. **What are routine or preventive services, and why are they treated differently than treatment of an illness or injury?**

   Routine, preventive care is care that is designed to help prevent disease, or to diagnose it in the early stages. Federal health care reform requires first dollar coverage of preventive care services when grandfathering is lost as a result of significant benefit and/or premium changes. The list of federally required preventive services is available at: http://www.healthcare.gov/news/factsheets/2010/07/ preventive-services-list.html Your provider uses standardized codes to bill your insurer for services.

SEE THE ***IT'S YOUR CHOICE: REFERENCE GUIDE*** *FREQUENTLY ASKED QUESTION* SECTION FOR INFORMATION REGARDING DEPENDENT ELIGIBILITY, FAMILY STATUS CHANGES AND HOW TO USE YOUR BENEFITS.

#18

ORDINANCE NO. 2012-____

Personnel Ordinance amendment addressing employee political activities

THE COUNTY BOARD OF SUPERVISORS OF JEFFERSON COUNTY DOES HEREBY ORDAIN AS FOLLOWS:

SECTION 1. Section HR0530, Political Activity, of the Personnel Ordinance is created as follows:

HR0530 POLITICAL ACTIVITY

A. Definitions. As used in this section.

1. "Workplace" shall mean the regular office and building of an elected official or, in the case of an employee, any place in which the employee is conducting regular business of Jefferson County, including County vehicles.
2. "Elected official" means the Sheriff, Coroner, Register of Deeds, County Clerk, Clerk of Circuit Court, and Treasurer.
3. "Employee" means every County employee except an elected official.
4. "Partisan" means related to an established political party within the meaning of the elections laws of the State of Wisconsin.
5. "Non-partisan" means unrelated to an established political party within the menng of the election laws of the State of Wisconsin.
6. "Political committee" means any person other than an individual and any combination of two or more persons, permanent or temporary, which makes or accepts contributions or makes disbursements, wheter or not engaged in activities which are exclusively political.
7. "Political purposes/activity": an act if for "political purposes" and constitutes "political activity" when it is done for the purpose of influencing the election or nomination for election of any individual to office, for the purpose of influencing the recall from or retention in office of an individual holding an office, for the purpose of payment of expenses incurred as a result of a recount at an election, or for the purpose of influencing a particular vote at a referendum.

B. In general, the following political activities are permissible for employees:

1. Making voluntary contributions for political purposes
2. Participating as a candidate for office, unless prohibited by the Hatch Political Activity Act, provided service in the office will not conflict or interfere with the efficient discharge of an employee's official duties.
3. Expressing opinions as an individual privately and publicly on all political subjects and candidates.
4. Being a member of a political party and participating in party affairs.
5. **The following are some of the political activities that an employee may participate in providing he or she is off duty and not on County property:**
   i. Soliciting votes in support of or in opposition to a partisan candidate for public office or political party office.
   ii. Serving as an officer of a political party, a member of a national, state or local committee of a political party, an officer or member of a committee of a partisan political club, or being a candidate for any of these positions.
   iii. Directly or indirectly soliciting, receiving, collecting, handling, disbursing, or accounting for assessments, contributions, or other funds for a partisan political purpose.
   iv. Taking an active part in managing the political campaign of a partisan candidate for public office or political party office.
   v. Acting as a recorder, watcher, challenger, or similar officer at the polls on behalf of a political party or partisan candidate.
   vi. Organizing, selling tickets to, promoting or actively participating in a fundraising activity of a partisan candidate, political party or political club.
   vii. Driving voters to polls on behalf of a political party or partisan candidate.

viii. Serving as a delegate, alternate or proxy to a political convention.
ix. Addressing a convention, caucus, rally, or similar gathering of a political part in support of or in opposition to a partisan candidate for public office or political party office.
x. Initiating or circulating a nominating petition.
xi. Endorsing or opposing a partisan candidate for public office or political party office in a political advertisement, a broadcast, campaign literature or similar material, except such action shall not be taken in the employee's official capacity, unless the employee is an elected official.
xii. Organizing or reorganizing a partisan political party organization or political club.

C. In general, the following political activities by employees or elected officials are prohibited:

1. Using governmental authority to interfere with or effect nomination or election for any public office or position within any political party.
2. Using governmental authority or influence to intimidate, threaten or coerce any person to vote contrary to his/her own voluntary choosing.
3. Using governmental authority to directly or indirectly intimidate, threaten, or coerce any person to pay, lend or contribute anything of value, including services, to any party, organization, group or individual for political purposes.
4. Using any official authority or influence to coerce any individual or group for political action, or to confer benefits or effect reprisals to secure desired political action or inaction.
5. Offering to pay or accept benefits in return for desired political action or inaction.
6. Requesting or receiving anything of value for influence or help in securing appointive office.
7. Paying or offering payment for securing appointive office.
8. Engaging in political activity on County-owned property or during work hours in such a manner as to give the impression of an official County endorsement of a particular candidate, proposal or position unless the County in fact has taken such a formal position or the employee reasonably believes the employee's political activity to be consistent with his or her official duties.
9. Directly or indirectly soliciting or receiving subscriptions or contributions for any political party or any political purpose while in a building, office or room occupied for any purpose by the County.
10. Either orally soliciting or by email or letter transmitting any solicitation to a County office or be in any manner concerned in soliciting any assistance, subscription or support for any political party or purpose from any person holding any position with Jefferson County while on County time or engaged in official duties.
11. During the hours when on official duty engaging in any form of political activity calculated to favor or improve the chances of any political party or any person seeking or attempting to hold political office. The wearing of political identification while on duty is such a political activity.
12. Use of county services, credit or property for political purposes.

SECTION 2. This ordinance shall be effective after passage and publication as provided by law.

AYES _____
NOES _____
ABSTAIN _____
ABSENT _____
VACANT _____

Requested by
Human Resources Committee

June 12, 2012

Phil Ristow: 10-01-09; 10-15-09

#19

Report to Human Resources Committee
June 5, 2012

Positions authorized to fill. The County Administrator and Human Resources Director have reviewed and approved to fill the following vacant position requests during the first quarter of 2012:

Child Support
- Part-time Financial Support Specialist

Clerk of Courts
- Full-time General Court Clerk II (two positions)

Fair Park
- Part-time (1000 hour) laborer positions (two positions)
- Full-time Fair Park Director

Health Department
- Full-time Public Health Nurse
- Part-time Public Health Technician (Jail)

Human Services
- Full-time Human Services Professional I
- Full-time Mental Health Worker
- Full-time Intake/Oncall Worker
- Full-time Child Protective Services Ongoing Professional I
- Full-time Support Services Planner

Parks
- Part-time (1000 hour) laborer position (two positions)

Sheriff's Office
- Full-time Communications Operator
- Part-time Communications Operator
- Part-time Deputy

UW Extension
- Summer Intern

Emergency Help Requests. The following were emergency help requests approved in the 1st quarter of 2012:

- **Human Services Early Intervention Teacher.** Assistance was approved to provide mandated services during an employee's leave of absence.
- **Human Services Support Services Planner.** Emergency help approved to assist with increasing workload during employee leave of absence.
- **Veterans Service Office**. Help approved to assist until vacant position was filled.
- **Human Services Family Development Worker** to assist during long-term leave of absences.

Reclassifications and Position Change requests for 2013 budget. Attached is a summary of the reclassification and position change requests.

New hires starting above minimum. The following three recent hires were authorized to start either above the minimum step, with additional benefits, or both:

- Public Health Nurse. Do to the difficult in recruiting RN positions, the recent new Public Health Nurse started March 26 at step 4 of the nursing scale ($25.522/hour) and one week of vacation in 2012.
- The Advanced Accountant at Human Services started in April at step 7 ($26.838/hour). The County did three active recruitments prior to finding and hiring this individual. She also received one week of vacation for 2012 and a full two –weeks in 2013.
- The Deputy VSO started on April 9 at step 4 ($17.80/hour) and one week of vacation in 2012.

Respectively submitted,

Terri M Palm
Human Resources Director

2013 Reclassification Requests

Position	Department
WIC Project Director	Health
~~Mechanic~~	~~Sheriff~~
Communications Supervisor	Sheriff
Community Resources Coordinator-Wraparou	Human Services
Personal Assistant Case Manager/Family Coo	Human Services
Human Services Professional II	Human Services
Human Services Professional I	Human Services
Child Protective Services Ongoing Professiona	Human Services
Comprehensive Community Services Supervis	Human Services
Early Intervention Program Coordinator	Human Services
W-2 Economic Support Program Manager	Human Services
Economic Support Specialist Supervisor	Human Services
Early Intervention Services Coordinator	Human Services
Benefits Administrator	Human Resources
Systems Analyst	MIS
~~Cartographer~~	~~LIO~~
Paralegal	DA
Operations Manager	Highway
Assistant Superintendent	Highway
Account Clerk	Highway
Sign Worker	Highway
Equipment Mechanic	Highway

2013 New Position requests

		Gross Cost		
Program Ass't I	Emergency Manage	$	28,745.74	to fulltime
Data Entry Clerk	ROD	$	27,408.73	to fulltime
Programmer Analyst	MIS	$	69,905.63	fund, dedicate 2000 hours to HS and receive greater reimbursement
Systems Analyst	MIS	$	-	unfund, contingent on reclas
Dog Park Attendatnt	Parks	$	6,370.25	increase hours
Volunteer Coordinator	Parks	$	23,467.59	fund 1000 hours
Program Ass't	Parks	$	24,648.94	to fulltime
Co-op Student x 2	Clerk of Courts	$	11,303.25	2 part-time students
Support Service Deputy X 2	Sheriff	$	97,739.45	fund
Janitor	Human Services	$	14,026.52	part-time
Intake/OnCall Workers	Human Services	$	66,174.82	fulltime
		$	369,790.92	

#20

YOUR COUNTY GOVERNMENT AT WORK - SCHEDULE OF MEETINGS 2012-2013

COMMITTEE / BOARD	ROOM/TIME	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR
Administration & Rules/ICC Committee 8:30 a.m. / 9:00 a.m.	Administrative & Rules Last Wednesday; 8:30 a.m. Rm 112 ICC 3rd Monday	30 21	27 18	25 16	29 20	26 17	31 15	28 19	26 17	30 21	27 18	27 18	24 15
Blue Spring Lake Mgmnt District	Called by President												
County Board of Health	Bi Monthly 3rd Wed 1:00 p.m. Conf. Rm		20		15		17		19		20		17
Economic Development Consortium	2nd Wednesday 8:30 a.m. UWX Rm 12	9	13	11	8	12	10	14	12	9	13	13	10
Fair Park Committee	1st Thursday 8:30 a.m.	3	7	5	2	6	4	1	6	3	7	7	4
Farmland Conservation Easement	2nd Monday 8:30 a.m. Rm 112	14	11	9	13	10	8	12	10	14	11	11	8
Finance Committee	2nd Thursday 8:30 a.m. Rm 112	10	14	12	9	13	11	8	13	10	14	14	11
Highway Committee	1st Tuesday 8:00 a.m. Hwy Office	1	5	3	7	4	2	6	4	1	5	5	2
Historic Sites Preservation Commission	4th Thursday 6:30 p.m. UWX	24	28	26	23	27	25	23	27	24	28	28	25
Home Consortium Board	3rd Thursday 9:00 a.m. Waukesha	17	21	19	16	20	18	15	20	17	21	21	18
Human Resources Committee	3rd Tuesday 8:30 a.m. Rm 112	22	19	17	21	18	16	20	18	15	19	19	16
Human Services Board	2nd Tuesday 9:30 a.m. Workforce	8	12	10	14	11	9	13	11	8	12	12	9
Infrastructure Committee	3rd Wednesday 10:30 a.m. Rm 112	16	20	18	15	19	17	21	19	16	20	20	17
Jefferson County Library Council	7:00 p.m. TBD												
Lake Ripley Management District	3rd Saturday 9:00 a.m. Oakland	19	16	21	18	15	19	17	15	19	16	16	20
Land & Water Conservation Committee	3rd Wednesday 8:30 a.m. Rm 202	16	20	18	15	19	17	21	19	16	20	20	17
Law Enforcement Emergency Mgmt	4th Friday 8:30 a.m. Rm 112	25	22	27	24	28	26	23	28	25	22	22	26
Mid-WI Federated Library Systems Bd	Last Tuesday 6:00 p.m. Horicon	29		31		25		27		29		26	
Parks Committee	1st Monday 1:00 p.m. Rm 202	7	4	2	6	3	1	5	3	7	4	4	1
Planning & Zoning Committee	Last Monday 8:30 a.m. Rm 203	X	4	30	27	24	29	26	31	28	25	25	29
Planning & Zoning Public Hearing (PH)	3rd Thursday 7:00 p.m. Rm 205	17	21	19	16	20	19	15	20	17	21	21	18
Planning & Zoning Board of Adjustment (Site Inspections followed by PH)	2nd Thursday 1:00 p.m. Rm 203/205	10	13	12	9	13	11	8	13	10	14	14	18
Planning & Zoning Site Inspections	Mon prior to PH 8:00 a.m. Rm 203	14	18	16	13	17	15	12	17	14	18	18	15
Solid Waste & Air Quality Committee	3rd Friday 8:30 a.m. Rm 203	18	15	20	17	21	19	16	21	18	15	15	19
University Extension Education Committee	2nd Monday 8:30 a.m UW Rm 12	14	11	9	13	10	8	12	10	14	11	11	8
Utility Tax Association	Quarterly	Called by Chair or the Board											
Veterans Service Commission	Annually 2:30 p.m. Rm 112	Called by Chair											
COUNTY BOARD	2nd Tuesday 7:00 p.m. *Monday	*7	12	10	*13	10	9	13	11	X	12	12	16
	7:00 p.m.	***Budget Public Hearing***					23						

NOTE: AGENDAS ARE DUE TO ADMINISTRATOR'S OFFICE BY 10:00 A.M. ON WEDNESDAYS
Regular Meeting Dates are Subject to change and must be given to the County Administrator's Office

Elections
May 8, 2012 / June 5, 2012
August 14, 2012 / November 6, 2012
February 19, 2013 / April 2, 2013

Board of Canvass
May 10 & 15 / June 7 & 12
Aug 16 & 21 / Nov 8 & 13
Feb 21 & 26 / April 4 & 9

Finance Committee
Budget Hearings
September 12, 2012
September 14, 2012
September 17, 2012
September 19, 2012

WI Counties
Annual Conference
September 23-25, 2012

County Fair
July 11-15, 2012

Clean Sweeps
May 19, 2012 Watertown
September 15, 2012 Fort Atkinson
October 5, 2012 Whitewater
April 13, 2013 Fair Park

April 13, 2012

HOLIDAY

Supplemental Information
Proposal to Conduct a Classification and Compensation Study

for

JEFFERSON COUNTY

JUNE 5, 2012

History and Facts About Our Firm

- 1972 – Originated as Public Sector Group of Hay Associates
- 1982 – We became an independent firm with HQ in Chicago
- 1992 – We established our national office in Arizona
- Office locations include Chicago, St. Paul, Austin, Dallas, Denver, Los Angeles, Sacramento, San Diego and Seattle
- We specialize in human resources for public employers
- Over 1,000 public employers served by members of our firm
- 100+ County governments served by our staff members

Our Approach to the Project

- We will work in partnership with HR and project team(s)
- We will encourage extensive participation by staff, Board
- We will emphasize employee participation, communication
- We will be readily available for meetings and presentations
- We will deliver high quality work, on time, within budget
- We will utilize extensive quality assurance procedures
- Our project team will include our President and Owner
- We will provide 12 months of implementation support
- We will provide on-site training for self-sufficiency

PUBLIC SECTOR PERSONNEL CONSULTANTS

Involvement of County Staff

- Maximum participation with minimal disruption
- Scheduling assistance required for meetings, desk audits
- No work space or administrative support required
- On-site visits, interviews, and ride-alongs included

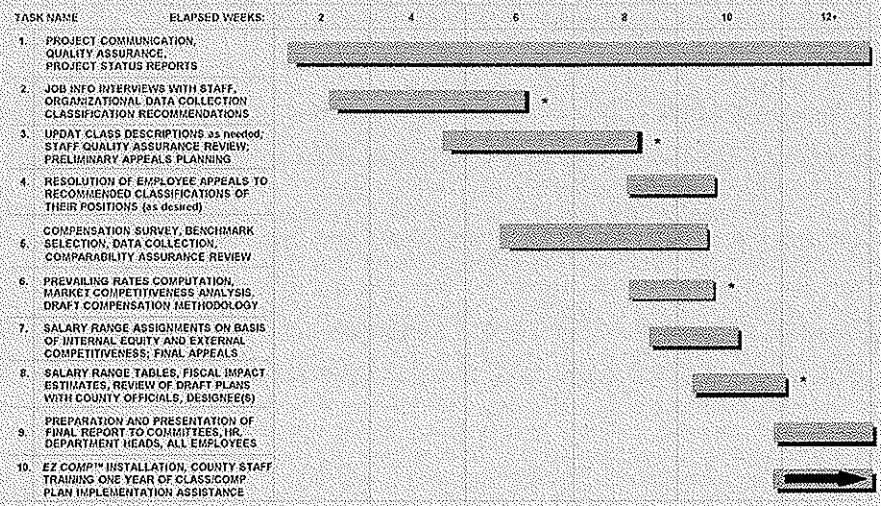
PUBLIC SECTOR PERSONNEL CONSULTANTS

Principal Project Components

- Establish partnership with HR, project team, Elected Officials
- Project planning and scheduling with project designees
- Management and employee information/communication plan
- Project briefings for employees, supervisors, and managers
- Principal project segments:
  - Organizational and Occupational Familiarization
  - Position Analysis and Classification Plan
  - Desk Audits with employees
  - FLSA/ADA/EEO-Compliant Job Descriptions
  - Comprehensive Compensation Survey
  - Competitive, Equitable, Sustainable Compensation Plan
  - Training and one year implementation support

PUBLIC SECTOR PERSONNEL CONSULTANTS

JEFFERSON COUNTY
PROPOSAL TO CONDUCT A CLASSIFICATION AND COMPENSATION STUDY
ESTIMATED PROJECT ELAPSED TIME CHART



JCWI PUBLIC SECTOR PERSONNEL CONSULTANTS 6/12

Jefferson County
Principal Project Tasks – Position Classification

- Custom PAQ distribution and explanation for included employees
- Desk audits w/ representative incumbents or groups of ee's
- Schematic of occupational job families, groups, FLSA designation
- No change, title change, merge, delete, split, new class
- Assignment of individual positions to job classifications
- No change, title change, reclassification of individual positions
- Quality assurance reviews* with HR and department heads
- Resolution of employee review to position's classification
- Updated FLSA/ADA/EEO-compliant job descriptions, as needed

*County staff or HR assistance

PUBLIC SECTOR PERSONNEL CONSULTANTS

Internal Equity Reviews

- We are trained in several tools – Hay, DBM, FES
- We recommend a tool that best meets organizational values and enables the County to maintain an equitable and competitive plan
- Any chosen system can be automated and customized
- County HR staff or project members will be trained in job evaluation, classification and compensation plan maintenance

PUBLIC SECTOR PERSONNEL CONSULTANTS

External Data Sources

- We will collect complete pay plans from survey comparators
- We will collect job descriptions, org charts, budget sheets
- We will follow up to ensure accurate job matching
- We do not rely on databases of survey information
- We do not rely on comparator agencies to make job matches
- We prefer to be in control of data analysis and job matching

PUBLIC SECTOR PERSONNEL CONSULTANTS

Salary Survey Illustration

Current Job Class	Survey Job Class	Participant Organization	Current Midpoint	7/1/12 External Midpoint	Variance $	Variance %
Administrative Assistant			$41,638	$39,278	$2,360	6.01%
	Administrative Specialist I	City of Peoria		$44,699		
	Office Coordinator	State of Illinois		$42,312		
	Secretary III	Madison County		$40,726		
	Administrative Specialist	McLean County		$40,134		
	Administrative Assistant	Rock Island County		$40,019		
	Administrative Assistant	Winnebago County		$39,000		
	Administrative Assistant	Champaign County		$37,783		
	Administrative Assistant	Tazewell County		$32,042		
	Planning & Zoning Secty	Fulton County		$31,928		
	Administrative Secretary	Sangamon County		$30,433		
			Individual Employer Rate:	$37,908		
	Administrative Assistant	Private Sector Peoria Area		$40,648		
			Published Survey Rate:	$40,648		
			Prevailing Rate:	$39,278		

Illustrative Salary Tables

Salary Range	Minimum	Midpoint	Maximum		Salary Range	Minimum	Midpoint	Maximum
16	$21,352	$26,199	$31,045		31	$44,389	$54,465	$64,541
17	$22,419	$27,509	$32,598		32	$46,609	$57,188	$67,768
18	$23,540	$28,884	$34,228		33	$48,939	$60,048	$71,157
19	$24,717	$30,328	$35,939		34	$51,386	$63,050	$74,714
20	$25,953	$31,845	$37,736		35	$53,955	$66,203	$78,450
21	$27,251	$33,437	$39,623		36	$56,653	$69,513	$82,373
22	$28,614	$35,109	$41,604		37	$59,486	$72,988	$86,491
23	$30,044	$36,864	$43,684		38	$62,460	$76,638	$90,816
24	$31,546	$38,707	$45,868		39	$65,583	$80,470	$95,357
25	$33,124	$40,643	$48,162		40	$68,862	$84,493	$100,125
26	$34,780	$42,675	$50,570		41	$72,305	$88,718	$105,131
27	$36,519	$44,809	$53,098		42	$75,920	$93,154	$110,387
28	$38,345	$47,049	$55,753		43	$79,716	$97,812	$115,907
29	$40,262	$49,401	$58,541		44	$83,702	$102,702	$121,702
30	$42,275	$51,872	$61,468		45	$87,887	$107,837	$127,787

Grade No	Step A	Step B	Step C	Step D	Step E	Step F	Step G	Step H	Step I	Midpoint
15	$1,606	$1,646	$1,686	$1,729	$1,771	$1,815	$1,859	$1,906	$1,952	$1,779
16	$1,686	$1,729	$1,771	$1,816	$1,860	$1,907	$1,953	$2,002	$2,051	$1,869
17	$1,771	$1,815	$1,859	$1,906	$1,952	$2,001	$2,050	$2,101	$2,152	$1,962
18	$1,859	$1,906	$1,952	$2,001	$2,050	$2,101	$2,152	$2,206	$2,260	$2,060
19	$1,952	$2,001	$2,050	$2,101	$2,152	$2,206	$2,260	$2,317	$2,373	$2,163
20	$2,050	$2,101	$2,152	$2,206	$2,260	$2,317	$2,373	$2,432	$2,491	$2,271
21	$2,152	$2,206	$2,260	$2,317	$2,373	$2,432	$2,491	$2,554	$2,616	$2,384
22	$2,260	$2,317	$2,373	$2,432	$2,491	$2,554	$2,616	$2,682	$2,747	$2,504
23	$2,373	$2,432	$2,491	$2,554	$2,616	$2,682	$2,747	$2,816	$2,884	$2,629
24	$2,491	$2,554	$2,616	$2,682	$2,747	$2,816	$2,884	$2,956	$3,028	$2,760
25	$2,616	$2,682	$2,747	$2,816	$2,884	$2,956	$3,028	$3,104	$3,180	$2,898
26	$2,747	$2,816	$2,884	$2,956	$3,028	$3,104	$3,180	$3,260	$3,339	$3,043
27	$2,884	$2,956	$3,028	$3,104	$3,180	$3,260	$3,339	$3,423	$3,506	$3,195
28	$3,028	$3,104	$3,180	$3,260	$3,339	$3,423	$3,506	$3,594	$3,681	$3,355
29	$3,180	$3,260	$3,339	$3,423	$3,506	$3,594	$3,681	$3,773	$3,865	$3,523

Jefferson County
Competitive and Equitable Compensation Plan

- $ ranges based on internal equity and external competitiveness
- Development or update of "vertical" relationships of each job group
- Fiscal impact estimates of recommended compensation plan
- Review of draft compensation plan with HR, project designee(s) *
- Assistance with determination of competitiveness policy *
- Compensation administration provisions and final report preparation
- ***EZ COMP***™ installation, implementation training, staff support
- One year of compensation plan implementation support – no cost

*County staff or HR assistance; critical Board or Committee input

PUBLIC SECTOR PERSONNEL CONSULTANTS

Salary Plan Illustration

Salary Ranges per Job Class – (Job Class Order)

Occupational Job Families and Job Classes	-- FY 2012 Recommended --			
	Salary Range	Minimum	Midpoint	Maximum
Treasurer/Recorder Group				
* Treasurer/Recorder	56	$42,017	$52,521	$63,025
Chief Deputy Treasurer	43	$30,480	$38,100	$45,720
Chief Deputy Recorder	43	$30,480	$38,100	$45,720
* Deputy Treasurer	39	$27,613	$34,517	$41,420
* Deputy Recorder	39	$27,613	$34,517	$41,420
Deputy Treasurer/Recorder	39	$27,613	$34,517	$41,420
Auditor's Group				
* Auditor	57	$43,067	$53,834	$64,601
Deputy Auditor, Computer Operations	43	$30,480	$38,100	$45,720
Property Specialist	43	$30,480	$38,100	$45,720
Valuation & Equalization Group				
* Tax Equalization Director	58	$44,144	$55,180	$66,216
* Property Assessor III (Advanced level) (was Senior)	46	$32,823	$41,029	$49,235
* Property Assessor II (Journey level)	43	$30,480	$38,100	$45,720
Property Assessor I (Entry level)	39	$27,613	$34,517	$41,420

Public Sector Personnel Consultants
Extra Values for Jefferson County

- We listen to our clients and are responsive to their needs
- Emphasis on decision-makers, employee "buy-in" throughout project
- Most experienced public sector Human Resources staff in U.S.
- "Staffed" firm dedicated to public sector classification/compensation
- Guaranteed highest quality services and work products
- Over 98% class/comp study implementation success rate
- Custom ***EZ COMP***™ application to ensure self sufficiency
- Twelve months of class and comp plan implementation support

PUBLIC SECTOR PERSONNEL CONSULTANTS

Terri Palm

From: Litke, Eric [elitke@gannett.com]
Sent: Tuesday, May 29, 2012 10:05 AM
To: Terri Palm
Cc: Schneider, Doug
Subject: RE: Open records request -- public payroll data

The reports you describe will suffice for our request. Please proceed at an estimated cost of $106.02 or less, assuming the benfits section does (as you anticipate) include the information detailed in our original request.

Thank you.

Eric Litke
Reporter
Gannett Wisconsin Media Investigative Team
(920) 453-5119

From: Schneider, Doug
Sent: Monday, May 28, 2012 7:55 PM
To: Litke, Eric
Subject: FW: Open records request -- public payroll data

From: Terri Palm [mailto:TerriP@jeffersoncountywi.gov]
Sent: Thursday, May 24, 2012 1:11 PM
To: Schneider, Doug
Cc: Gary Petre
Subject: RE: Open records request -- public payroll data

Mr. Schneider,

In regards to your request below, the following is the information I could produce with about 1 – 2 hours of time to tweak current reports: As of 1/1/12, a census listing of each employee's name, job title, date of most recent hire (would not have experience from previous employment either with Jefferson Co or elsewhere), expected 2012 salary (hourly rate x expected hours to work in the year...would not include budgeted OT, shift diff, etc), 2011 regular earnings (which includes shift differential, on call pay, call-in pay, etc., but NOT overtime), 2011 overtime earnings (strictly overtime earnings either under contract or FLSA regs, does NOT include shift diffs, etc.), 2011 benefits (I have to verify, but I believe the report we have includes the info you requested).

As I mentioned I would anticipate not spending more than 2 hours of time tweaking the reports and reviewing to ensure it meets your request, at a maximum cost of $106.02. If the total benefits section does not exactly meet your requirement, I will let you know if we have the ability to easily write a program to do so, and the associated cost.

However, if you would like the information exactly as requested (except as noted below*), the 2012 estimated salary to include anything other than base hourly rate and/or the 2011 earnings to include only base wages and the 2011 overtime earnings to include misc. earnings such as on-call and shift differential, I would need to have our MIS department reprogram this report to essentially "move' fields around. I estimate there would be no more than 4 hours of MIS staff time and 2 hours of HR staff time to reprogram the report, at a maximum cost of $339.96.

*Regardless, I would be submitting two separate reports that you could integrate together, and the years of experience can only be relayed to date of hire.

Please let me know how you would like me to proceed.

Sincerely,

Terri Palm

Terri M. Palm
Human Resources Director
Jefferson County
320 S. Main St.
Jefferson, WI 53549
920-674-7103

From: Schneider, Doug [mailto:DSCHNEID@greenbay.gannett.com]
Sent: Wednesday, May 09, 2012 3:44 PM
To: barbF@jeffersoncounty.gov
Cc: Terri Palm; Dave Ehlinger
Subject: Open records request -- public payroll data

Barb Frank, County Clerk
Jefferson County, WI

VIA E-MAIL

Re. Open Records Request for Employee Compensation Data

Dear Barb,

Thank you for taking the time the other day to speak with me. Here is a copy of the request we discussed; as you suggested, I am including copies to Terri and Dave.

The Gannett Wisconsin Media Investigative Team, which represents 10 daily newspapers around the state, is compiling information for a database of public employee salaries. We plan to publish a list detailing compensation for every state, county and school district employee, as well as those in cities, towns and villages with populations of 10,000 or more. This will include all employees with a 2012 salary of $25,000 or more.

For each of those employees, please provide:

1. Name
2. Job title
3. Years of experience
4. 2012 projected salary
5. 2011 actual salary
6. 2011 overtime
7. 2011 total benefits (including health insurance, retirement and any other payment not included in salary or overtime)

This information is subject to Wisconsin Open Records Law, which requires that public entities fill such requests "as soon as practicable and without delay." **We ask that you provide your employee compensation data by June 15**, as we understand the demands on your time and the time that may be required to fill this request. To help answer any questions you may have in advance, we have included an instruction sheet on the next page. While gathering this data

previously in select markets, we have generally received the information free of charge. If you anticipate charging costs in excess of $100, however, please contact us in advance.

We ask that you provide the data in digital format, ideally a Microsoft Excel spreadsheet. You can e-mail the information to elitke@gannett.com. If the only option is to mail a CD or hard-copy records, those can be sent to Eric Litke, 632 Center Ave., Sheboygan, WI 53081.

Thanks for your time and help in pulling this together. If you have any questions, please feel free to e-mail (elitke@gannett.com) or call (920) 453-5119. Or, you may contact Doug Schneider at dschneid@greenbaypressgazette.com or (920) 431-8333.

Thank you,

Eric Litke
Reporter
Gannett Wisconsin Media Investigative Team

IMPORTANT THINGS TO KNOW

- We ask that you include the employee's NAME, JOB TITLE, YEARS ON THE JOB, SALARY, PAID OVERTIME and TOTAL BENEFITS.

- **Salaries** should be what the employee was actually paid in 2011, and what he or she is contracted or budgeted to be paid for the 2012 year. We understand that it is impossible for you to provide us with total sick pay, summer school, etc. for the current fiscal year. (For school districts, please try to include monies paid to employees for coaching, advising, etc. Phase II money and other disbursements need not be included.)

- **Overtime** is for actual amount paid in 2011. This figure should include shift differentials or other payments beyond base salary that do not fall under benefits.

- **Benefits** are payments made in 2011 for RETIREMENT FUNDS and SOCIAL SECURITY as well as premiums (if applicable) for HEALTH AND DENTAL INSURANCE, LONG-TERM DISABILITY INSURANCE, LIFE INSURANCE and WORKERS COMPENSATION INSURANCE. We do not need these numbers individually, just in a total benefit amount for each employee.

- We ask that you send us salaries for employees who make $25,000 a year or more. For hourly employees who normally work 40 hours per week, that would include employees who are paid $12 per hour or more.

- Please do the best you can to ensure the accuracy of the listings.

A spreadsheet row could look something like the following:

Name	Title	Experience	'12 Salary	'11 Salary	'11 Overtime	'11 Benefits
John Smith	teacher	17	$31,984	$30,084	$2,420	$13,673

JEFFERSON COUNTY HUMAN RESOURCES DEPARTMENT

2011 Annual Report

The Jefferson County Human Resources Department is pleased to provide the 2011 Human Resources Annual Report and the opportunity to share an overview of the department's programs, initiatives and accomplishments. The Human Resources Department strives to provide the highest level of public service and reflects this through focusing on our objective to be a customer service focused Human Resources Team dedicated to being a resource to staff, departments, Board Supervisors and citizens of Jefferson County.

In February, 2011, public entities in Wisconsin began experiencing change that was and continues to be unprecedented. Not only did the "normal" federal and state regulations in employment law areas continue, but the Budget Repair Bill (BRB) fundamentally changed the rights and responsibilities of public sector employers and employees in the State of Wisconsin. With legal issues still pending regarding the Budget Repair Bill, implementation of the new law was and continues to revolve around change and uncertainty, with the recall election hoping to answer the question of going forward, or turn around and go back.

Significant changes and/or accomplishments throughout this past year due to the implementation of Acts 10 and 32 include:

- With the exception of public safety employees, the County is now *prohibited* from bargaining collectively with a bargaining unit with respect to any factor or condition of employment, except for total base wages. In addition, those base wages are capped (unless a referendum authorizes a greater increase). A 2011 agreement of wages were reached with four AFSCME units, granting a one-time .96% payment at the end of 2011.
- Provided on-going communications and question/answer information to employees, including the effective dates of employees contributing to the the Wisconsin Retirement System and ceasing union dues from payroll deductions.
- Provided additional information on the County's LifeMatters program to assist employees who may struggle financially or emotionally with the impact of the BRB
- Creation of personnel ordinance HR0520, Grievance Resolution Process, as required by law. This grievance procedure specifically outlines the process for termination, discipline and workplace safety grievances.
- Amendment of Personnel Ordinance HR0360, Hours of Work, Overtime and Compensatory Time. Although the amendements require many employees to follow overtime regulations established under the Fair Labor Standards Act, other various sections (shift differentials, on-call pay, etc) adopted language/practices under former union contracts.
- Attended ongoing trainings/seminars regarding the new regulations and implementation factors

Other accomplishments/goals that time and efforts were dedicated to include:

- Settlement of a three-year contract with represented staff at the Sheriff's deposit, 2011-2013
- Revisions to Personnel Ordinance sections HR0100 – HR0400, updating over 14 ordinance <u>not</u> influenced by the BRB
- Continued to work with MIS to develop an on-line timekeeping program. This procedure allows employees to enter exceptions (vacation, sick, missed punch, etc.) on-line. The manager then approves or rejects the exception, and the time is then uploaded to our

KRONOS timekeeping system. This helps our office by cutting down on paperwork and data entry and also gives the employee and manager the ability to see the individual's actual time-entry for the pay period, as well as viewing "live" accrual banks.

- Provided training courses on Supervisor Responsibility and other Employment Law issues.
- Provided a Benefits Fair for all County Employees on October 13, including arranging for our Health Department to be a provider with the two major HMOs in Jefferson County's State Health Insurance Program in order to administer flu shots.

The remainder of this report highlights information on the "normal and regular" functions of the HR Department, including Recruitment and Retention, Compensation and Benefits, Training and Development, Employment Law, Employee and Labor Relations, and specific goals for 2012.

Respectfully Submitted,

Terri M Palm-Kostroski
Human Resources Director

PERSONNEL SUMMARY - The Human Resources Department staff includes: Terri Palm-Kostroski, Human Resources Director; Ellen Braatz, Benefits Administrator; and Tonia Mindemann, Human Resources Specialist. In addition, Tammie Jaeger, Administrative Assistant, provides assistance whenever possible.

In 2011, the Human Resources Department served over 625 employees and elected officials annually in a variety of functions, summarized in the following sections:

RECRUITMENT AND RETENTION - Human Resources supervises and participates in recruitment, interviewing, testing, selection, orientation and evaluations of all employees. In 2011, this included:

- Prepared and placed **65** employment advertisements and job postings, in addition to ads for ongoing recruiting efforts
- Approximately **60** New Employee Orientation sessions were conducted
- **16** 360°-performance evaluations completed, in addition to managing annual evaluations completed on **each** employee
- **55** employees attended new employee orientation
- **82** New Hire reports sent on-line to Wisconsin Department of Workforce Development
- **76** Written Employment verifications were completed
- Administered pre-employment testing to **144** applicants
- Reviewed **463** performance evaluations

Personnel Changes	**2009**	**2010**	**2011**
New Hires	87	79	55
Recalled from Layoff	0	2	0
Terminations/resignations	117	289 (104 w/o CSH)	75
Promotions	13	6	8
Voluntary Transfers	14	6	16
Involuntary Transfers or employees bumped due to another employee laid off	5	7	1
Lay-offs resulting in loss of job	18	3	1
Turnover (Terms/average # employees)	**17.93%**	**45.73%**	**14.15%**
Turnover not considering the sale of CSH	**17.93%**	**15.05%**	**14.15%**
Number of employees (December 31)	**731**	**533**	**527**
Full-time Equivalents (FTE)	**608.88**	**460.1**	**457.9**

COMPENSATION AND BENEFITS - Human Resources also plans, directs, evaluates and explains the employee benefits program, including Health and Dental insurance, the Wisconsin Retirement System, Voluntary Life and Disability Insurance plans, Deferred Compensation, Section 125b plan, as well as vacation, sick and holiday accruals; researches, evaluates and recommends new benefits, including implementation of new benefits; acts as liaison or plan administrator with various insurance carriers and fosters effective relationships with client representatives. The Human Resources Department coordinated the FOURTH annual Benefits Fair with representatives from a majority of our benefit providers. With the cooperation of the Health Department, a flu clinic was also set up during the benefits fair for employees.

1. **LIFEMATTERS (EAP)**
   - Utilization was down slightly from 2.9% to 2.4%
   - **11** employees and/or family members and **2** managers/supervisors/HR staff accessed LifeMatters services, while an additional **50** employees used the self-help tools on the Empathia website
2. **RECLASSIFICATIONS**
   - **7** requests (affecting **7** employees) processed
   - **6** requests were successful (**6** employees affected)
3. **STEP INCREASES**
   - **170** employees received pay "step" increases, in addition to the annual adjustment made to all employees at the beginning of the year.
   - Computed **460** longevity payments, for a total of **$106,526.10**
   - **25** employees received Contingency pay or increase in Contingency pay
4. **SALARY SURVEYS**
   - Participated in **2** Salary surveys and EEO (Equal Employment Opportunity) reporting requests
5. **DEFERRED COMPENSATION**
   - Coordinated **3** on-site meetings with Nationwide, the County's deferred compensation administrator
6. **HEALTH and DENTAL INSURANCE**
   - Completed **2892**Health and Dental insurance related transactions for employees and family members
7. **WISCONSIN RETIREMENT**
   - Enrolled **35** employees into the Wisconsin Retirement System
8. **ACCRUED BENEFITS**
   - Exclusive of Countryside, **20,371.94 hours** of sick time used that was NOT covered under FMLA, costing the County approximately **$564,635.90,** inclusive of WRS and FICA. This does NOT include lost productivity or overtime. This computes to an average of **46.83** hours PER eligible employee…or nearly **6** days.

TRAINING AND DEVELOPMENT. In the fall of 2011 MATC 17 hours of training over four separate days. This training was provided to all department heads.

Schedule & Location:

- **October 4, 2011 – "Essentials of Leadership"** Four hours of instruction presented to 16 department heads.
- **October 11, 2011 – "Turning Conflict Into Collaboration"** Four hours of instruction presented to 18 department heads.
- **November 8, 2011 – "The Courage to Coach"** Three hours of instruction presented to 11 department heads
- **November 28, 2011 - Personal Change and Organizational Change"** Six hours of instruction presented to 15 department heads

EMPLOYMENT LAW

- **Americans with Disability Act and Americans with Disability Act Amendments.** Ensure compliance with the Federal and Wisconsin regulations governing Disabilities in the Workplace. Assisted in **4** reasonable accommodations for employees.
- **COBRA.** Complied with **62** Cobra notifications.
- **Fair Labor Standards Act (FLSA).** The FLSA establishes minimum wage, overtime pay, recordkeeping, and child labor standards affecting full-time and part-time workers in the private sector and in Federal, State, and local governments. **The Human Resources department manages employee time-keeping system and ensures accurate time-entry into payroll/HR system.**
- **Family Medical Leave Act (FMLA).**
  - **113** employees used their protected rights under Federal and/or State FMLA. **37** of these employees were Countryside employees from January – June, 2011.
  - **16,984.18 hours** of protected FMLA leave was used, about **8.1 FTE**! This is an up from last years' **16,414 hours** of protected leave, about **7.9 FTE.**
- **Harassment and Discrimination laws**. Investigated **4** harassment complaints.
- **HIPAA (Health Information Portability and Accountability Act.** Ensure compliance with new regulations as it pertains to employee's health, dental, long-term care insurances and the LifeMatters (Employee Assistance Program).
- Attended **1 unemployment** hearings.
- **Uniformed Services Employment and Reemployment Rights Act (USERRA).**
  - **5** employees were on Military leave at some point in 2011, consisting of **2983** hours.
- **Workers Compensation**. Administers and coordinates back-to-work programs and assists with investigations to prevent Workers Compensation fraud.
  - Received and managed **20 Reportable** First Report of Injury forms.
  - **154** days employees did not work.
  - **68** days of light duty or restricted duty.

EMPLOYEE AND LABOR RELATIONS - Human Resources participates in labor negotiations with Jefferson County's 5 unions (4 AFSCME groups and 1 LAW), also taking a lead in investigations of grievances and complaints.

- **5** union grievances received
- **1** grievance arbitrations filed. All settled either prior to or in mediation process
- **5** disciplinary investigations completed
- **14** changes to the Personnel Ordinance Handbook

GOALS FOR 2012

1. Review of Personnel Ordinances. There are two sections of the Personnel Ordinance remaining to be reviewed and updated (the first four sections have already been reviewed and updated in March, 2012). In addtion, there are approximately 15 new personnel ordinances that need to be written, such as a light duty policy, layoff/recall procedures, workplace violence policy.

2. Complete implementation of an on-line, time-keeping entry system. As one of the goals outlined in the operational study conducted in 2008, the HR department has started, and will continue to move forward with the objective to streamline and automate employee time-keeping processes. Over half of the Courthouse departments are able to enter "exception notices" (i.e. vacation requests) on-line, which is then approved by the supervisor and updated in 'real time'.

3. Continue additional training opportunities for staff (minimum of five topics annually). In addition to continuing to provide training opportunities, there is a need to encourage, motivate or convince different levels of supervisors to attend and promote these training sessions.

4. Complete on-line application process. There is much more to the recruitment process than running an ad, interviewing candidates and making an offer. The reporting requirements alone can consume nearly 3 hours per week of staff time. With the assistance of MIS, we hope to complete an on-line application process, which would automate some of the mandated tracking, retaining and reporting requirements. This program will also make it easier for supervisors to review applications at any time.

5. Instill workplace wellness initiatives, both Countywide and as needed by individual departments. Providing employee with voluntary health lifestyle intiatives can be implemented countywide, while other initiatives, such as "warming up" in the morning, may be more appropriate for more physically enduring departments.