

EXHIBIT A: DESCRIPTION OF SERVICES

Evergreen Solutions, LLC <small>Contractor/Consultant</small>	Administration <small>Department</small>		
Professional Services Agreement <small>Description</small>	Human Resources <small>Division</small>		
August 1, 2023 – January 31, 2024 <small>Agreement Term</small>	Class & Comp Study <small>Project</small>		
021-2301 <small>Agreement Number</small>	\$54,000.00 <small>Amount</small>	10100021 <small>Org. Key</small>	5271 <small>Object Code</small>

Evergreen understands that the County has approximately 600 employees and 342 job descriptions that will be included in the study; however, for Tasks 3, 4, and 11 only 211 employees and approximately 82 job descriptions will be included in those tasks. These tasks would basically exclude employees within the Sheriff's Office, including correctional workers.

Task 1.0 - Project Initiation

TASK GOALS: Finalize the project plan with Calaveras County; gather all pertinent data; finalize any remaining contractual negotiations; and establish an agreeable final timeline for all project milestones and deliverables.

TASK ACTIVITIES

- 1.1 Discuss with the County's Project Manager and any other key project staff (i.e. County Administration and the HR department) the following objectives: understand the mission of the County; review our proposed methodology, approach, and project work plan to identify any necessary revisions and to assess any concerns; reach agreement on a schedule for the project including all assignments and project milestones/deliverables; and establish an agreeable communication schedule.
- 1.2 Identify potential challenges and opportunities for the study. Discuss the strategic direction of the County and some of the short- and long-term priorities. This activity serves as the basis for assessing where the County is going and what type of pay plan will reinforce current and future goals.
- 1.3 Obtain relevant materials, including: any previous projects, research, evaluations, or other studies that may be relevant to this project; organizational charts for the departments and divisions, along with related responsibility descriptions; current position and classification descriptions, salary schedule(s), and classification system; strategic business plans and budgets; and personnel policies and procedures, and the step placement policies. **Note:** Evergreen will review salary schedules, Memorandum of Understandings (MOUs), labor market policies, internal equity structure, and related documentation.
- 1.4 Review and edit the project work plan and submit a schedule for the completion of each project task with the County's Project Manager (CPM).
- 1.5 Provide weekly progress reports to the CPM.

KEY PROJECT MILESTONES: Comprehensive project management plan and database of County employees.

Task 2.0 – Evaluate the Current System

TASK GOAL: Conduct a comprehensive preliminary evaluation of the County's existing compensation plan.

TASK ACTIVITIES

- 2.1 Obtain the existing pay structure and compensation philosophy (if any). Review the existing pay structure and look for potential problems and issues to be resolved.
- 2.2 Determine the strengths and weaknesses of the current pay plan(s). Discuss any pay compression issues that may exist and discuss resolutions.
- 2.3 Work with the CPM to develop a compensation philosophy of where the County desires to be in the market as it relates to employee salaries.
- 2.4 Complete an assessment of current conditions that details the pros and cons of the current system as well as highlights areas for potential improvement in the final adopted solution.

KEY PROJECT MILESTONES: Review of existing compensation plan(s) and assessment of current conditions.

Task 3.0 - Collect and Review Current Environmental Data

TASK GOALS: Conduct statistical and anecdotal research into the current environment within the County and guide subsequent analytical tasks. **Note:** This task would include approximately 211 employees.

TASK ACTIVITIES

- 3.1 Schedule and conduct employee orientation sessions with the County staff.
- 3.2 Meet with department heads to obtain relevant information and statistical/anecdotal data on specific compensation issues and policies. Obtain insight into perceived current compensation system strengths and weaknesses.
- 3.3 Hold focus groups with a sample of staff to obtain additional relevant information and statistical/anecdotal data on specific compensation issues and policies.
- 3.4 Work with the CPM to administer the Job Assessment Tool (i.e., Position Description Questionnaire) and the Management Issues Tool (MIT). Our staff utilizes a web-based tool for data collection, but we can provide paper copies as well as those for classifications without computers or internet access. We will seek approval from the CPM before distribution of the JAT/MIT questionnaire.
- 3.5 Review any data provided by the County that may provide additional relevant insight.

KEY PROJECT MILESTONES: JAT and MIT distribution; interviews; and employee focus groups and orientation sessions.

Task 4.0 – Evaluate and Build Projected Classification Plan

TASK GOALS: Identify the classification of existing positions utilizing Evergreen's job evaluation system; review JAT responses; and characterize internal equity relationships within the County. **Note:** This task would include approximately 211 employees.

TASK ACTIVITIES

- 4.1 Ensure that all draft class specifications are provide to Evergreen by the CPM.
- 4.2 Review the work performed by each classification and score. Include an evaluation of supervisory comments.
- 4.3 Review JAT scores and identify the classification of positions.
- 4.4 Schedule and conduct additional follow up with employees for jobs where uncertainty exists over data obtained from the JATs.
- 4.5 Develop preliminary recommendations for the classification structure. The classification system designed at this point would be based solely on internal equity relationships and would be guided by the JAT scores for each classification. Essentially, a structure of classifications would be established, and classifications with similar scoring would be grouped and spacing between jobs would be determined.
- 4.6 Identify career ladders, as appropriate.
- 4.7 Review recommendations with the CPM.

KEY PROJECT MILESTONES: JAT scores by class; recommended classification changes; and preliminary job structure based on internal equity.

Task 5.0 - Identify List of Market Survey Benchmarks and Approved List of Targets

TASK GOALS: Reach an appropriate number and identify the proper benchmark positions for the external labor market salary and benefits assessment and identify and develop a comprehensive list of targets for conducting a successful external labor market salary and benefits assessment.

TASK ACTIVITIES

- 5.1 Identify a list of classifications (benchmarks) to include in the labor market salary and benefits survey. **Note:** Evergreen will work with the CPM to select up to 125 classifications to use as benchmarks for the market salary and benefits survey.
- 5.2 Evergreen will work with the CPM to select up to 20 targets (i.e., peer organizations) for the market salary and benefits survey.
- 5.3 Finalize a list of survey targets for the external labor market survey, placing a comparative emphasis on characteristics such as: size of the organization; geographic proximity to the San Andreas area; economic and budget characteristics; and other demographic data. **Note:** Evergreen will include counties surrounding Calaveras, such as Tuolumne, Amador, San Joaquin, and Stanislaus.
- 5.4 Review survey methodology with the CPM and refine survey methodology prior to distribution of surveys.
- 5.5 After approval of survey methodology, develop contact list of peer organizations and notify peers of impending surveys.

KEY PROJECT MILESTONES: Preliminary list of benchmark positions for the external labor market assessment salary and benefits survey; final list of benchmark positions for the external labor market assessment; initial list of survey peers; final list of survey peers and contacts; and survey methodology

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

TASK GOALS: Conduct the external labor market salary and benefits survey and provide a summary of the salary and benefits survey results to the CPM for review.

TASK ACTIVITIES

- 6.1 Prepare customized external labor market salary survey for the CPM's approval. Discuss questions and categories to include in the market salary survey with the CPM.
- 6.2 Develop a listing of the current benefits for comparisons with peer organizations.
- 6.3 Using the list of County provided benefits (i.e., base salary, cash supplements, certification pay, auto allowance, employer- paid insurance premium contributions for health, dental, vision insurance, and life insurance, leave benefits including, holidays, sick leave, management leave (comp time), and vacation), develop a list of benefits to include in the external labor market survey.
- 6.4 Prepare benefits survey to be included with salary survey developed in **Task 4.1**.
- 6.5 Contact the targets for electronic completion of the survey. Provide paper copies by fax, if requested.
- 6.6 Conduct necessary follow-up through e-mails, faxes, and phone calls.
- 6.7 Collect and enter survey results into Evergreen's electronic data analysis tools.
- 6.8 Validate all data submitted.
- 6.9 Develop and submit summary report of external labor market salary assessment results. **Note:** Evergreen will produce easily readable labor market data through spreadsheets.
- 6.10 Submit summary report of external labor market salary and benefits assessment results to the CPM.

KEY PROJECT MILESTONES: Market salary and benefits survey instrument and summary report of external labor market and benefits assessment results.

Task 7.0 – Develop Strategic Positioning Recommendations

TASK GOALS: Assess the appropriateness of the County's current compensation policy and develop a plan for County employees, providing issue areas and preliminary recommendations for strategic improvement.

TASK ACTIVITIES

- 7.1 Identify the compensation policy and accompanying thresholds.
- 7.2 Using the market salary and benefits data collected in **Task 6.0** and the classification data reviewed in **Task 4.0**, determine the proper pay plan for staff, including number of grades, steps, and ranges.
- 7.3 Produce a pay plan(s) that best meets the needs of the County from an internal equity and external equity standpoint. **Note:** Evergreen will also include factors such as gender and minority equity, fair and equitable pay and compaction within a classification series.

KEY PROJECT MILESTONES: Proposed compensation strategic direction, taking into account internal and external equity and plan for addressing unique, highly competitive positions.

Task 8.0 – Conduct Solution Analysis

TASK GOALS: Conduct analysis comparing JAT values; survey results for the benchmark positions; and produce several possible solutions for implementation.

TASK ACTIVITIES

- 8.1 Conduct regression analysis or other appropriate techniques to properly slot each classification into the proposed pay plan for the County.
- 8.2 Place all classifications into pay grades based on **Task Activity 8.1**. Sort alphabetically by job class title, in descending order by range, and by old class title and new class specifications.
- 8.3 Create implementation solutions for consideration that take into account the current position of the County as well as the findings from the classification and compensation analysis. Identify and prepare a range of compensation policy alternatives.
- 8.4 Meet with the CPM to discuss the potential solutions.
- 8.5 Determine the best solution to meet the needs of the County in the short-term and long-term and document the accepted solution.

KEY PROJECT MILESTONES: Initial regression analysis; potential solutions; and documented final solution.

Task 9.0 – Develop and Submit Draft and Final Reports

TASK GOALS: Develop and submit a draft and final report of the Classification and Compensation Pay Study for Calaveras County and present the final report.

TASK ACTIVITIES

- 9.1 Produce a draft report that captures the results of each previous step and provide to the CPM. The draft report will include any costs associated with all recommendations and will include implementation strategies.
- 9.2 Submit the draft report to the CPM for review and meet with County management staff virtually to present the draft plan and review recommendations. **Note:** Evergreen will address any issues, concerns, and comments the County has prior to the preparation of the final compensation report.
- 9.3 Make edits and submit necessary copies of the final report to the CPM.
- 9.4 Present the final report to the Board of Supervisors.
- 9.5 Develop a communication plan for sharing study results with employees.
- 9.6 Develop implementation database to communicate the process and progress of this project to CPM.

KEY PROJECT MILESTONES: Draft and final reports; final presentation; communication plan; and implementation and maintenance database

Task 10.0 – Develop Recommendations for Compensation Administration

TASK GOAL: Develop recommendations for the continued administration by County staff to sustain the recommended classification and compensation structure.

TASK ACTIVITIES

10.1 Develop recommendations and guidelines for the continued administration and maintenance of the classification and compensation structure, including recommendations and guidelines related to: how employees will move through the pay structure/system as a result of transfers, promotions, or demotions; how to pay employees whose base pay has reached the maximum of their pay range or value of their position; the proper mix of pay; how often to adjust pay scales and survey the market; the timing of implementation; and how to keep the system fair and competitive over time.

10.2 Recommend recruitment/retention strategies, where appropriate.

10.3 Present recommendations to the CPM for review.

KEY PROJECT MILESTONES: Recommendations for compensation administration; and recommendations for recruitment/retention policies

Task 11.0 – Provide Revised Class Descriptions and FLSA Determinations

TASK GOALS: Update existing class descriptions; create new class descriptions as needed, ensuring EEO/ADA requirement satisfaction; provide final version of all class descriptions/specifications in electronic format (i.e., MS Word) after approval by the CPM and the Human Resources Department. **Note:** This task would include approximately 82 job descriptions.

TASK ACTIVITIES

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

11.2 Discuss new class description format with the CPM and the Human Resources Department.

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

11.4 Recommend a systematic, regular process for reviewing job descriptions.

KEY PROJECT MILESTONES: Updated class descriptions; new class descriptions as needed; and FLSA determinations.

Proposed Timeline

Evergreen possesses the ability, staff, skills, and tools to conduct a Classification and Compensation Pay Study for Calaveras County in six months of the project start date and following the execution of a contract. This timeline is based on a tentative start date of August 1, 2023, and a completion date of January 31, 2024. Our proposed timeline can be modified in any way to best meet the needs of the County.