

PROPOSAL

Truckee Tahoe Airport District

Total Compensation Study (Part A)

RFP

Due: Monday, May 31, 2021

5:00 pm PT

PROPOSAL CONTACT:

VICKI QUINTERO BRASHEAR

Director of Products and Services

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Tax ID: 68-0067209

www.cpsshr.us



Your Path to Performance

Transmittal Letter

May 31, 2021

Lauren Tapia, Human Resources Manager
Truckee Tahoe Airport District
10356 Truckee Airport Road
Truckee, CA 96161

Subject: Request for Proposal - Total Compensation Study (Part A)

Submitted via email to Lauren.Tapia@TruckeeTahoeAirport.com

CPS HR Consulting (CPS HR) is pleased to submit this proposal to the Truckee Tahoe Airport District (District) to provide comprehensive compensation study services for the District's employees. With a rich history of assisting government agencies with their classification and compensation studies, we at CPS HR are confident that we can provide expert solutions to meet the District's requirements and objectives.

Our Understanding of the Scope of Work

CPS HR understands that the District is seeking a consulting firm to conduct a District-wide compensation study. Our approach to consulting can be summarized in the following statements:

- CPS HR fully understands that compensation studies require an iterative, collaborative, and flexible approach. Our work plans are designed to be inclusionary and collaborative with all stakeholders.
- Compensation systems should be designed to serve as a foundation for an organization over many years. We believe our greatest strength is our ability to work with our clients to develop systems that will adapt to changing operational and economic conditions.

These approaches, along with our methodology, will support the District's goals of ensuring internal alignment and equity between groups and providing market based salary recommendations.

This budget assumes:

- Compensation study:
 - Total Compensation (salary and benefits)
 - Up to **15** benchmark classifications (recommended)
 - Labor market pool of up to **10** agencies (recommended)
 - Review and update of compensation policy and structure
 - Provision of salary recommendations
 - Use of private sector data through the use of Economic Research Institute

At CPS HR, we pride ourselves in establishing and nurturing long-term relationships with the agencies we serve as we live out our mission of bringing excellence in Human Resources to the public sector. We look forward to the opportunity to work with the District on this important project and to partner with your organization into the future.

Our Commitment to Project Success

Capacity and Availability

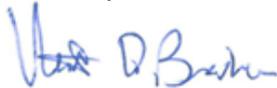
The designated project team is available to integrate project assignments into their existing workload. We pledge our commitment to perform this work in an efficient and timely manner for any and all of the services we present in our workplan provided in this proposal. Our CPS HR Project Team will focus on maintaining open communication with the District’s designated staff to ensure that this project preserves its focus, the District’s objectives are met, and all deliverables adhere to the confirmed timeline and budget.

| CONTACT INFORMATION | |
|---|--|
| Proposal/RFP Process Contact and Contract Authorized Representative | Vicki Quintero Brashear, Director of Products and Services (916) 471-3481; vbrashear@cpshr.us |

Thank you for this opportunity; we very much look forward to working with the Truckee Tahoe Airport District. Should you have any questions, please do not hesitate to contact *me at the contact information above.*

I have the authority to bind CPS HR Consulting into contract. All conditions contained in this proposal, including all pricing quotes, shall be irrevocable for a period of sixty (60) days from the Proposal Opening Date of May 31, 2021.

Sincerely,



Vicki Quintero Brashear
Director of Products and Services

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Proposer Qualifications

About CPS HR Consulting

CPS HR is an innovative, client-centered human resources and management consulting firm specializing in solving the unique problems and challenges faced by government and non-profit agencies. As a self-supporting public agency, we understand the needs of public sector clients and have served as a trusted advisor to our clients *since 1985. Our mission is to promote human resource excellence in the public sector and our vision is to enable people to realize the promise of public service.*

| ORGANIZATION IDENTIFICATION INFORMATION | |
|---|---|
| Legal Name and DBA | Cooperative Personnel Services dba CPS HR Consulting |
| Main Office | 2450 Del Paso Road, Suite 220, Sacramento, CA 95834 Main: (800) 822-4277; FAX (916) 263-3613 <i>*Primary location from which services will be provided.</i> |
| Regional Offices | 100 Congress Avenue, Suite 2000, Austin, TX 78701 4 West Dry Creek Circle, Suite 100, Littleton, CO 80120 1968 S. Coast Hwy # 961, Laguna Beach, CA 92651 |
| Years in Business | Established 1985 |
| # of FTEs | 89 |
| Type of Organization | Joint Powers Authority (Public Agency) |
| State/County Registration #s | As a California JPA with federal income tax exemption under IRS Code Section 115, CPS HR is exempt from most Local and State taxes. |
| Federal Tax ID#/TIN/EIN | 68-0067209 |
| Website | www.cpshr.us |

CPS HR’s core competency is its knowledge of and expertise in the public sector. As a public agency, we understand the challenges and issues facing our client base. We provide best practice expertise that is unique because CPS HR believes in an integrated, systems-based approach to human resources. Our consultants understand that the multiple functional human resources disciplines (including classification and compensation) work together to foster an optimal Human Resource system.

CPS HR CONSULTING SERVICES

ORGANIZATIONAL STRATEGY

- Workforce & Succession Planning
- Organizational Assessment
- Organizational Redesign and Re-Engineering
- Performance Management
- Employee Engagement
- Change Management
- Diversity, Equity & Inclusion

CLASSIFICATION AND COMPENSATION

- Classification
- Compensation

GENERAL HR SERVICES

- HR Outsourcing
- Complaint Investigations

TESTING, RECRUITMENT & SELECTION

- Job Analysis
- Assessment Center Services
- Executive Search
- Recruitment Solutions
- Test Development*
- Test Administration*

*(for employment and licensing certification)

TRAINING AND DEVELOPMENT

- Training Courses & Programs
- Executive Coaching
- Accelerated Leader 360° Assessment™
- Leadership Development

Distinguishing Characteristics

Depth of experience working in public agencies. CPS HR is a joint powers authority, and as such, our charter mandates that we provide services exclusively to public agencies and non-profits. CPS HR has conducted hundreds of classification and compensation related studies for cities, counties, courts, special districts, water and utilities, and higher education institutions.

CPS HR staffing. CPS HR employs only the best staff members. Many of our staff have both public and private classification and compensation experience, they are diligent in their work, listen to and understand the needs of our clients, and possess advanced education and certifications such as **SHRM, IPMA, World at Work**, etc.

Use of best practices. CPS HR applies best practices and utilizes proven classification and compensation principles in all our engagements.

Quality and tailored services. CPS HR delivers quality and tailored classification and compensation services to better meet each client's unique study goals and objectives.

Extensive Experience

CPS HR has been providing classification and compensation services to state, federal, and local governments along with special districts and non-profit organizations for 35 years.

We have performed many studies with agencies of similar size and scope as the Truckee Tahoe Airport District. Additionally, the references and project list we have included in this proposal provide further clarity around the type of classification and compensation projects with which we have worked. With these examples, we have shown how we have collected data, performed analyses on said data, made recommendations, and worked successfully with our partners/clients.

Project List

We have conducted hundreds of classification and compensation studies for municipal agencies, special districts, and higher education. Due to the significant number of projects, we provided a partial list of public agencies for which we have provided classification and compensation services below.

Partial Five-Year Listing

| Partial Public Agency Classification and Compensation Five Year Listing | |
|---|--|
| *CPS HR has provided multiple services to these agencies | |
| Alameda Corridor East Construction Authority | Monterey, County of* |
| Amador-Tuolumne Community Action Agency | Montgomery College, MD |
| American Canyon, City of* | Napa County Transportation & Planning Agency |
| Anaheim, City of* | Oakdale, City of |
| Ashland, City of | Ontario, City of* |
| Association of Bay Area Governments* | Orange, County of* |
| Austin Energy | Petaluma, City of |
| Bell, City of* | Placer, County of* |
| Berkeley, City of* | Rancho Cucamonga, City of |
| Bernalillo, County of* | Redding, City of (Electric Utility) |
| Brawley, City of | Regional Transportation Commission, NV |
| California Bureau of State Audits | Rio Dell, City of* |
| California Dept of Corrections and Rehabilitation | Rocklin, City of* |

| Partial Public Agency Classification and Compensation Five Year Listing *CPS HR has provided multiple services to these agencies | |
|--|--|
| California Department of Energy | Roseville, City of (Electric Utility Department) |
| California Department of Food and Agriculture | Sacramento Municipal Utility District |
| California Department of Human Resources | Sacramento, County of* |
| California Department of Real Estate | Safety Center, Inc. |
| California Office of the Chief Information Officer | San Diego County Water Authority |
| California Seismic Safety Commission | San Joaquin Regional Rail Commission |
| California State University, Sacramento | San Joaquin, County of* |
| Clark, County of* | San Luis Obispo, County of |
| Contra Costa, County of | Santa Cruz Metropolitan Transit District |
| Cucamonga Valley Water District | Santa Cruz Regional Transportation Commission |
| Eureka, City of | Santa Cruz Unified School District |
| Glenn, County of* | Sierra Nevada Conservancy |
| Greater Los Angeles County Vector Control District | Stanislaus, County of* |
| Housing Authority of Santa Clara | State Bar of California |
| Imperial, County of | Superior Court of California, Orange County |
| Jurupa Community Services District | Tehachapi, City of |
| Long Beach Unified School District* | Temecula, City of* |
| Long Beach Water District | University of the West* |
| Los Angeles Co Employees Retirement Assoc.* | Ventura, County of* |
| Los Angeles Department of Water and Power | Vista, City of* |
| Madera, City of | Waxahachie, City of |
| Mojave Water Agency* | Western Area Power Administration |
| Monterey Peninsula Airport District | Yosemite Community College* |

References

Agency Name: Santa Clarita Valley Water Agency, CA (2019 – 2021)

Address: 27234 Bouquet Canyon Rd, Santa Clarita, CA 91350

Contact: Aristeia Mantis, Human Resources, Supervisor; (661) 297-1600 ext. 235; amantis@scvwa.org

Services: Provide classification and compensation studies for single class or department wide projects.

San Diego Association of Governments (SANDAG) (2017 – Present)

Address: 401 B Street, Suite 800, San Diego, CA 92101

Contact: Melissa Coffelt, Manager of HR; (619) 699-1955; melissa.coffelt@sandag.org

Services: Provide classification and compensation studies for single class or department wide projects.

Agency: Colorado River Fire Rescue, Colorado (2018 – 2019)

Address: 1850 Railroad Ave, Rifle, CO 81650

Contact: Leif Sackett, Fire Chief; Leif.Sackett@Crfr.us

Services: CPS HR conducted a comprehensive total compensation survey project in 2018/19 and developed a compensation policy for the District as follow on work in 2019. Additionally, we currently provide Human Resources services on-demand for the District.

Key Personnel

We have a uniquely qualified team of professionals who are readily available to assist the District with its studies. Our CPS HR Project Team will focus on maintaining open communication with the District's designated staff to ensure that this project preserves its focus, the District's objectives are met, and all deliverables adhere to the confirmed timeline and budget.

Project Manager

We have selected **Ms. Michelle Garbato, M.A., SPHR** to serve as Project Manager and Point of Contact for the District during the engagement. The Project Manager's role will be to work directly with the District's Internal Project Manager to (i) ensure the District's study needs and goals and objectives are understood and accurately communicated to District management, other key stakeholders, and the CPS HR Project Team; (ii) conduct client meetings; (iii) be responsive to all client requests; (iv) manage the work of the CPS HR Project Team; (v) meet timeline and budget expectations; (vi) conduct quality control of deliverables; and (vii) meet/provide information/present results to the District.

Ms. Garbato brings over 13 years of progressive experience in public sector human resources at the state and local levels. A consultant and change agent, she has extensive experience partnering with clients and creating and implementing innovative solutions to attract and retain highly qualified employees. She has a talent for managing large scale projects while balancing multiple stakeholder interests and ensuring quality and compliance. She has led statewide initiatives impacting over 200 state agencies and has been responsible for upholding the merit principle for over 220,000 employees. A firm believer in professional growth through education and training, she remains active within the field and holds various human resources certifications and credentials.

Account Manager

Mr. Justin Chaudoin will serve as the local Account Manager for this project. His role will be to work directly under the CPS HR Project Manager and with the District's Internal Project Manager to support all project goals and objectives and allow for a cost-effective approach to more frequent in-person meetings and presentations. Mr. Chaudoin joins CPS HR from the City of San José where he served as the Human Resources Manager for the Department of Parks, Recreation, and Neighborhood Services, which is the second largest department in the City. While with the Department, he oversaw the Employee Services unit which included Recruitment, Training and Development; Employee Engagement; Employee Relations; Investigations; Progressive Discipline; Labor Relations; Workers Compensation; Return to Work; Interactive Process; Classification and Compensation; and Payroll/Timekeeping. He was also responsible for the development and successful implementation of key initiatives to create a lasting shift in organizational culture, such as the development of the Department's Leadership Principles. He has a proven track record in developing and maintaining effective communications and working relationships between management, employees, Union representatives, and inter-agency stakeholders. In addition to his time with the City of San José, he has held key management roles in the private sector, and served as an aviation officer in the U.S. Army for over seven years.

Consultants and Roles

CPS HR has a uniquely qualified team of professionals to assist the District with its studies. Ms. Garbato will be joined by Project Consultants **Sarah Jansen, B.B.A.** and **Edie Sabia**, as well as Technical Specialist, **Igor Shegolev, M.S, SPHR.**

Ms. Jansen is an experienced Senior Human Resources Consultant with CPS HR possessing 15 years of experience, including more than 12 years as a generalist and Deputy HR Director with the County of Lake. During that time, she served as the primary classification and compensation contact for the County, including serving on the County’s Classification and Compensation Committee.

Ms. Sabia is a highly motivated individual with strong leadership skills having over thirty years of experience, in both public and private sectors, related to human resources, payroll, benefits, training, operational administration, project management and accounting. Ms. Sabia is a demonstrated decision maker and problem solver with a strong background in management, administration, operational development and deployment of human resource and payroll information systems.

Mr. Shegolev is a compensation and human resources practitioner with extensive experience in managing HR activities and teaching graduate business courses. For the last two decades, he has held executive jobs in compensation and HR management in government and the healthcare industry. He has worked with a broad spectrum of organizations providing advanced and effective solutions in compensation management, total rewards, and employment analytics.

Each of the team members has broad and deep experience in public sector classification and compensation systems and analysis and are readily available to assist the District with this project. We are committed to meeting the highest professional standards of quality.

Full résumés are provided under **Appendix A.**

| PROPOSED CPS HR TEAM—STAFF ROLES AT A GLANCE | |
|--|--|
| CPS HR Consultant Name, Title, Location | Responsibilities |
| Michelle Garbato, MA, Project Manager | <ul style="list-style-type: none"> ● Develops and ensures the project plan is in alignment with needs of the District ● Manages costs by ensuring project remains within the appropriate scope and expenditure targets ● Acts as primary client liaison and interfaces directly with client representatives ● Defines the direction of the team on the project ● Uses reports and status meetings to control progress/address hurdles ● Ensures project is delivered within budget and scope and on time ● Ensures compliance with terms and conditions of contract ● Checks all deliverables for accuracy and correctness |

| PROPOSED CPS HR TEAM—STAFF ROLES AT A GLANCE | |
|---|---|
| CPS HR Consultant Name, Title, Location | Responsibilities |
| Sarah Jansen, Project Consultant Edie Sabia, Project Consultant Igor Shegolev, Technical Specialist | <ul style="list-style-type: none"> ● In concert with Project Manager, reviews and provides feedback on the project plan and methodologies ● Responsible for the development of all project deliverables ● Uses reports and status meetings to control progress/address hurdles; conducts quality control |

A description of our proposed project approach, work elements, and deliverables for all phases are included in the following section, **Approach to the Project**. A Fee Estimate by work task is provided under the **Cost Proposal** section.

Approach to the Project

Compensation Study Workplan

The compensation work plan outlined in this section is intended to define all tasks within a base salary and comprehensive total compensation study from labor market selection to final reports, and the types of deliverables associated with each task. CPS HR identifies data points collected for base salary studies in addition to total compensation studies.

Following is our methodology and proposed work plan. Specific details, e.g., number of interviews or meetings, for each task follow each one. A table depicting hours per task, staff level assigned, and itemized costs are provided under the **Cost Proposal** section.

Task 1 – Review the District’s Background Materials. Upon contract execution, CPS HR will request background information from the District in order to ensure our Project Manager and Project Team are prepared for initial meetings. Examples include: 1. Compensation philosophy and strategy; 2. Salary schedules; 3. Benefits summaries; 4. Budget Information; 5. Compensation policies and procedures, past studies; and 6. Other documents relevant to the study.

Task 2 – Initial Project Meeting/Labor Market Agency and Benchmark Selection Discussions. The CPS HR Project Manager will meet with the District’s Internal Project Manager and any other designated stakeholders, including executive management and labor representatives, to discuss the study methodologies, deliverables, timelines, communication, and data collection methods. The CPS HR Project Manager will determine the District’s compensation philosophy in this meeting to obtain direction and consensus. Additionally, the CPS HR Project Manager will be available to conduct a workshop with these key stakeholders to discuss the following elements of compensation policy:

- Labor Market Agency Selection - This section of the workshop focuses on the typical labor market selection criteria and the process by which CPS HR will evaluate and prepare recommendations for the District’s labor market agencies; such selection criteria typically includes: (i) Geographic Proximity, (ii) Services provided, (iii) Past labor market agency practices, (iv) Cost of Living/Cost of Wages, and (v) Size of the organization (measures may include number of employees or population).
- Additional workshop topics are
 - Labor market position (i.e., median, mean, or other percentile)
 - Benchmark classifications to be selected based on the following criteria:
 - They should be classifications for which counterparts can readily be found in surveyed employers so that sufficient compensation data can be gathered. Classifications which have a large number of comparables from other agencies are generally selected as benchmark classifications.
 - Benchmark classifications should have significant relationships to other classifications

in their occupational group. This ensures they will make good reference points in relating and establishing salaries for other classifications within their occupational groups.

- Elements of total compensation to be surveyed

Client Responsibilities and/or Pricing Assumptions Associated with Task:

- It is assumed that no more than **15** benchmark classifications will be identified for the complement of the classification structure resulting from the classification study.
- It is assumed that no more than **10** labor market agencies will be selected for comparison by the District.

Task 3 – Design, Develop, and Distribute the Survey Instrument. The CPS HR Project Team will develop a comprehensive survey instrument to ensure the effective collection of compensation data from each of the survey agencies. For a *total compensation* study, the following elements of total compensation are added to the base salary survey: (i) Cash add-ons premium pays such as longevity pay and deferred compensation; (ii) Agency contribution to medical, dental, and vision programs; (iii) Agency contributions to defined-benefit retirement programs and Social Security practices; and (iv) Paid time off practices such as Holiday leave, vacation and sick leave, and administrative leave. Additional benefits and/or policies can be collected as agreed.

Task 4 – Review, Analyze, and Validate Labor Market Survey Data. We begin labor market data collection by researching available information online to make preliminary classification matches and obtain benefits data. The CPS HR Project Team will reach out to labor market agencies to confirm and/or complete survey data after completing as much pre-work as possible. We find that this initial collection effort results in greater participation from the labor market agencies. Once we have completed our survey analysis tasks, the CPS HR Project Manager will audit the final data as part of our quality review process.

Classification matching includes reviewing agency background materials such as copies of classification specifications, organization charts, staffing information, and other useful materials to substantiate the accuracy of the comparability of the matches. It is critical that the CPS HR Project Team review such documents since titles alone can often be misleading and should not be relied upon.

To determine whether a match from a labor market agency is comparable to the District’s benchmark, CPS HR utilizes a whole job analysis methodology; this commonly used methodology analyzes the job as a whole, rather than by individual factors, by evaluating the core duties and responsibilities, the nature and level of work performed, and the minimum qualifications to determine whether the classification is comparable enough to be utilized as a match.

Client Responsibilities and/or Pricing Assumptions Associated with Task:

- Should any labor market agencies be non-responsive to requests for information, we will provide the District with contact information and request that they use their professional contacts to follow up on CPS HR’s behalf. We have found this approach to be beneficial.

- At an additional cost, the District may add additional labor market agencies should any in the initial selection be non-responsive or not provide sufficient matches.
- **Responsiveness of labor market agencies is absolutely critical to maintaining the agreed timeline.** An amended timeline will be provided by the CPS HR Project Manager if the data collection period is pushed out.

Task 5 – Design and Develop Data Spreadsheets. CPS HR will develop an individual data sheet for each survey classification that presents the comparable classification used in each agency with the relevant data associated with that classification, such as the position ranking within the labor market and salary range minimum and maximum.

The labor market data analyses will be conducted based upon the labor market position affirmed within the District’s compensation philosophy (e.g., median, mean, or other percentile). Each comparable match for each survey classification is reported in the relevant data sheet for full disclosure and review by others. We find this level of transparency in matching provides for a better understanding and acceptance of study results.

Task 6 – Conduct Benefits Analysis. The benefit data submitted from the labor market agencies will be analyzed quantitatively and qualitatively.

In the quantitative analysis, specific benefits will be incorporated into the base salary data sheets to provide a total compensation analysis. This analysis of program costs will provide the District with an understanding of how the study classes compare against their market when the costs of benefits programs are taken into consideration. Within these data sheets, four different analyses can be conducted based on how our clients wish to view the data:

1. An analysis of the survey classification’s position within the labor market for base salary
2. An analysis of the survey classification’s position within the labor market when the cost of cash add-ons is taken into consideration (total cash)
3. An analysis of the survey classification’s position within the labor market when the cost of cash add-ons and health programs are taken into consideration
4. An analysis of the survey classification’s position within the labor market when the cost of cash add-ons, health program costs, and retirement contributions are taken into consideration (total compensation)

The qualitative analysis will include a write-up of the general trends of benefits offered across the agencies as well as summary tables showing the practices of each agency.

Task 7 – Conduct Internal Equity Analysis/Prepare Draft Salary Recommendations. A comprehensive and balanced pay program is the result of the analysis of external labor market data, combined with an analysis of important internal relationships that reflect the District’s value system of jobs.

With the whole job methodology, the internal pay relationship analysis for non-benchmark classifications will involve several steps to arrive at sound and equitable relationships. Among others,

the most important of these steps will include: 1. Analysis of pay relationships based on the outcome of the classification study; 2. Development of consistent, uniform, and realistic guidelines for determining internal relationships including span of control, nature and level of work performed and related components; and 3. Recommendation of equitable and appropriate internal relationship differentials based on the above.

Provided below is the methodology CPS HR utilizes for establishing salary levels for benchmark and non-benchmark classifications in our compensation studies. This methodology would be applied to all the District study classifications.

1. Conduct a comprehensive understanding of the District's approach to identify the benchmark classifications to be used in the salary setting process.
2. Establish salary recommendations for these benchmark classifications by setting the salary level based on the market data.
3. Conduct a comprehensive review of the District's current internal alignment differentials to determine what their practices are, and if they should be adjusted.
4. Apply recommended internal differentials within job families to build the salary recommendations for classifications which have significant relationships to each other because they are in the same job series or family.
5. Determine the remaining classifications that are not benchmark classifications, or classes that minimal comparable data was available for, and are also not part of a job series or family. These classifications are then reviewed to determine which classifications are the subject classifications currently internally aligned with and whether that relationship should be changed. Evaluation factors include the nature and level of work performed, as well as the minimum qualifications.

The salary recommendations for each study classification will display the following information: (i) Classification title; (ii) Current monthly range maximum; (iii) Recommended monthly range maximum; and (iv) The percentage difference and/or dollar amount difference between the current and recommended monthly range maximum and the steps within a range, if desired. This information will provide the District with the percentage and dollar amount of any increase on a classification-by-classification basis.

Task 8 – Prepare and Present Draft Compensation Report. The CPS HR Project Team will develop a Draft Compensation Report detailing the results of the labor market survey and a suggested implementation plan to address salary range changes. This draft report will comprise the following: 1. Scope of the study; 2. Labor market agencies, including the comparable characteristics (e.g., size, scope of services, number of employees, etc.); 3. Study benchmarks, including methodology utilized to identify benchmarks; 4. Labor market data analysis/methodologies; 5. Results of the base

salary survey; 6. Results of the benefits analyses; 7. Results of the total compensation analysis; 8. Salary recommendations for all classifications; and 9. Implementation methods¹

CPS HR will review the draft report with the Internal Project Manager and designated stakeholders.

Client Responsibilities and/or Pricing Assumptions Associated with Task:

- Costs assume one virtual meeting, for up to two hours, with primary District Project Manager/HR staff to discuss the Draft Compensation Report.
- As the District conducts its review of the Draft Report, client comments and questions will be captured in a single document provided on the online shared drive.

Task 9 – Research and Resolve Issues/Prepare and Present the Final Compensation Report. Based upon the District’s review of the Draft Compensation Report, the CPS HR Project Team will follow-up and resolve any outstanding compensation issues. CPS HR will prepare a final compensation report and will discuss it with the Internal Project Manager and designated stakeholders.

Client Responsibilities and/or Pricing Assumptions Associated with Task:

- Costs assume one meeting, for up to two hours, with primary District stakeholders to present the Final Compensation Report.

¹ It is CPS HR’s standard practice to assist our clients with evaluating and developing a method to implement compensation changes that are identified as a result of the study and this is included within the proposed budget. Our salary recommendations will provide the District with the percentage of pay required to maintain each classification at the desired market position, as well as an average percentage of all classifications within the compensation plan. CPS HR can also provide information on typical implementation strategies such as Step-to-Step and Closest Dollar. However, CPS HR does not provide a detailed analysis of individual employee implementation and costs since our clients typically utilize their own systems for that purpose.

Proposed Timeline

An example timeline follows, and the CPS HR Internal Project Manager and the District can discuss varying approaches to customize the timeline. CPS HR recommends a structured timeline that can be flexible to accommodate varying factors in achieving set milestones.

Our compensation timeline is based upon the assumption that (i) the District approve and accept the classification study within the agreed upon timeframe; (ii) selected labor market agencies will provide the information required within the specified timeframe, and that (iii) the District will be able to review, comment on, and approve study products within agreed upon timeframes.

CPS HR is open to discussion regarding the commencement of the classification study in the interest of the District’s operational goals. The final timeline after that point is highly dependent on any dialog/meetings/time the District will need to review the data internally. **We understand that the District has requested a targeted completion date of September 22, 2021 (with commencement of services on June 23, 2021).** However, with the classification study work intervening, we believe the compensation project will begin after the finalization of classification specifications, which will take place around September 22, 2021.

| Example Total Compensation Study Timeline Begins After Classification Study is Concluded | Week Number(s) |
|---|----------------|
| Review the City’s Background Materials; Labor Market Agency Research | 1 |
| Initial Project Meeting, Labor Market Agency Confirmation, and Benchmark Selection | 2 |
| Design, Develop, and Distribute Survey Instrument | 3-4 |
| Collect, Analyze, and Validate Labor Market Survey Data | 5-7 |
| Conduct Matching Process | 8-9 |
| Client Review of Preliminary Matches; Provides Feedback | 10 |
| Design and Develop Data Spreadsheets/Benefits Analysis | 11-12 |
| Prepare Draft Salary Recommendations and Draft Compensation Report/Conduct Internal Equity Analysis | 13-14 |
| Client Review and Feedback Period | 15 |
| Research and Resolve Issues/Prepare and Present Final Compensation Report | 16-17 |

Time Requirements

Project Management Approach

Availability and Resources

With 89 full-time employees as well as 200+ project consultants and technical experts nationwide, CPS HR delivers breakthrough solutions that help public sector organizations impact the communities they serve. CPS HR has worked with more than 1,200 government and public/non-profit clients throughout the United States and Canada. Our headquarters are located in Sacramento, California. We have regional offices in Southern California; Austin, TX; and Littleton, CO.

CPS HR is dedicated to the commitment of its full complement of resources for the success of all projects. The team members who will be working on this project will be readily accessible and are committed to meeting all deadlines and scheduled timeframes. The designated project team is available to integrate project assignments into their existing workload. We pledge our commitment to perform this work in an efficient and timely manner for any and all of the services we present in the Scope of Services section of this proposal. Additional project team members will be available to provide remote support based on their area of expertise relevant to the needs of the District.

Our Service Philosophy

Delivering on our promise to provide outstanding quality to our clients rests on our reliance of the following foundational principles that we follow every day:

- All materials are kept secure by using our secure Microsoft Teams site and internal shared drive.
- Keeping confidences regarding our client projects, nuances, political influences, etc., is required.
- Transparency and honesty are critical and frequently practices, even when difficult conversations are needed.
- We strive to understand your goals and collaborate with you to achieve them. Our approaches are customized to your needs.
- We will use your time efficiently and respectfully.

Our Communication Model

CPS HR Consulting recognizes that the success of any project depends upon the ability of the consulting team to develop and maintain effective working relationships with the District's Project Representative, management, employees, and other key stakeholders. Throughout the project, we envision collaborating with the District's Project Representative to maintain open lines of project communications and to develop a shared understanding of project needs, goals, and objectives.

CPS HR Consulting considers that open and consistent communication with project stakeholders is a key element of project acceptance and success. For that reason, the work plans presented by CPS HR Consulting contain multiple communication points with the District including:

- Initial project meetings
- Bi-weekly or weekly scheduled Project Meetings (Via e-mail or teleconference)
- Ad-hoc teleconference meetings with the District Project Representative, and other designated stakeholders, as requested
- On-site meetings to present project deliverables, if requested.

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

Cost Proposal

Professional Fixed Fee

CPS HR has prepared the following **professional fixed fee** based on the scope of work outlined.

| Study | Professional Fixed Fee |
|---|------------------------|
| Total Compensation Study | \$62,153.75 |
| Not-To-Exceed Contract Amount: \$62,153.75 | |

Pricing Assumptions

| General Scope | |
|-------------------------------------|---|
| Number of Benchmarks | Up to 15 |
| Number of Labor Markets | Up to 10 |
| Not Included in Expense Cap: | |
| Materials Production | CPS HR provides all documents electronically. Hard copy printing of documents for this engagement will be the responsibility of the District. |
| Consultant Expenses | Travel hours have not been budgeted for this scope as all work is expected to occur virtually. |

Itemized Breakdown of Tasks

| Labor Code | Hours | Cost |
|--|-------|------------|
| Project Preparation, Internal/External Client Kick Off Meetings, Timeline and Task Planning | | |
| Project Manager | 5.00 | \$700.00 |
| Principal Consultant/Technical Specialist | 10.25 | \$1,383.75 |
| Senior Consultant | 10.75 | \$1,290.00 |
| Senior Program Coordinator | 5.50 | \$660.00 |
| Administrative Technician | 5.50 | \$440.00 |
| Task Subtotal | 37.00 | \$4,473.75 |
| Labor Market and Benchmark Research | | |
| Project Manager | 0.00 | \$0.00 |
| Principal Consultant/Technical Specialist | 5.50 | \$742.50 |
| Senior Consultant | 6.00 | \$720.00 |
| Senior Program Coordinator | 1.00 | \$120.00 |
| Administrative Technician | 7.50 | \$600.00 |
| Task Subtotal | 20.00 | \$2,182.50 |
| Survey Development, Distribution, and Data Collection (Salary + Benefits) | | |
| Project Manager | 2.50 | \$350.00 |
| Principal Consultant/Technical Specialist | 5.00 | \$675.00 |

*Proposal to the Truckee Tahoe Airport District
Total Compensation Study (Part A)*

| Labor Code | Hours | Cost |
|--|--------|-------------|
| Senior Consultant | 25.00 | \$3,000.00 |
| Senior Program Coordinator | 13.50 | \$1,620.00 |
| Administrative Technician | 26.00 | \$2,080.00 |
| Task Subtotal | 72.00 | \$7,725.00 |
| Job Matching, Auditing, and Data Analysis | | |
| Project Manager | 7.00 | \$980.00 |
| Principal Consultant/Technical Specialist | 47.00 | \$6,345.00 |
| Senior Consultant | 68.00 | \$8,160.00 |
| Senior Program Coordinator | 35.00 | \$4,200.00 |
| Administrative Technician | 28.00 | \$2,240.00 |
| Task Subtotal | 185.00 | \$21,925.00 |
| Salary Recommendations and Internal Equity Development and Finalization | | |
| Project Manager | 0.00 | \$0.00 |
| Principal Consultant/Technical Specialist | 40.00 | \$5,400.00 |
| Senior Consultant | 0.00 | \$0.00 |
| Senior Program Coordinator | 0.00 | \$0.00 |
| Administrative Technician | 0.00 | \$0.00 |
| Task Subtotal | 40.00 | \$5,400.00 |
| Reporting and Presentations | | |
| Project Manager | 7.00 | \$980.00 |
| Principal Consultant/Technical Specialist | 27.00 | \$3,645.00 |
| Senior Consultant | 13.00 | \$1,560.00 |
| Senior Program Coordinator | 6.00 | \$720.00 |
| Administrative Technician | 17.00 | \$1,360.00 |
| Task Subtotal | 70.00 | \$8,265.00 |
| Project Management, Quality Control, Status Reporting | | |
| Project Manager | 14.50 | \$2,030.00 |
| Principal Consultant/Technical Specialist | 5.50 | \$742.50 |
| Senior Consultant | 11.00 | \$1,320.00 |
| Senior Program Coordinator | 7.50 | \$900.00 |
| Administrative Technician | 5.50 | \$440.00 |
| Task Subtotal | 44.00 | \$5,432.50 |
| Miscellaneous Compensation Items: Implementation Scenarios, Update Pay Structure, Private Sector Data | | |
| Project Manager | 0.00 | \$0.00 |
| Principal Consultant/Technical Specialist | 50.00 | \$6,750.00 |
| Senior Consultant | 0.00 | \$0.00 |
| Senior Program Coordinator | 0.00 | \$0.00 |
| Administrative Technician | 0.00 | \$0.00 |
| Task Subtotal | 50.00 | \$6,750.00 |

Billing Terms

CPS HR will bill in equal installments at the following milestones:

- After kick off meeting
- Final selection of labor market agencies and benchmarks
- Provision of draft matches
- Submission of draft compensation report
- Submission of final compensation report

It is assumed that the District will be responsive to the delivery of all draft deliverables and all subsequent revisions as defined in the agreed upon project timeline. **Unanticipated revisions or delays to the project timeline could result in a need for an addendum to the contract related to contract end date, staff assignments, and/or pricing. Any addenda will be discussed in a timely manner with the District.**

Pricing Philosophy

CPS HR is flexible with the proposed work plan; alternate approaches may be discussed with the District which may in turn change the proposed cost of the project. As described in this proposal, the methods, approach, timelines, as well as the proposed fee, have been prepared as accurately as possible based upon the services requested and study objectives described in the information provided to CPS HR. The proposed professional fees reflect the steps and time necessary to conduct the study in a sound, thorough, and sustainable manner, including important input and review by the District's Internal Project Manager and designated stakeholders to accomplish the study objectives. If changes or additional services are required, we will be happy to discuss changes to the project activities, schedule, and/or fee proposal.

Hourly Rates for Additional Services

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

| Schedule of CPS HR Billing Rates | |
|---|-------------|
| Project Staffing Category | Hourly Rate |
| Project Manager | \$140 |
| Principal Consultant/Technical Specialist | \$135 |
| Senior Consultant/Senior Program Manager | \$120 |
| Administrative Technician | \$80 |

Signature Page

Our proposal shall be irrevocable for a period of sixty (60) days from the Proposal Opening Date.

| | |
|----------------------------|---|
| Organization Name: | CPS HR Consulting |
| Authorized Representative: | Vicki Quintero Brashear, Director of Products and Services |
| Signature: |  |
| Date: | 5/28/2021 |

Appendix A – Project Team Résumés

Michelle Garbato, M.A., SPHR, Project Manager

Employment History

- Principal Human Resources Consultant, CPS HR Consulting
- Human Resources Analyst III, Sanitation Districts of Los Angeles County
- Administrative Manager, County of Orange
- Program Manager, California Department of Human Resources
- Human Resources Manager, Beyond Carnism

Professional Experience

- Generalist and Specialist Human Resources experience with expertise in Recruitment & Selection and Classification & Compensation
- Current Project Manager for classification and compensation studies for public sector clients (state, local and special districts)
- Conduct position/classification analysis, working out of class, salary surveys, developing classification specifications and duty statements, etc.; complete statewide job analyses and exam development for a variety of classification levels and types
- Provide consultative services at state and local organizations; conduct audits, resulting in updates to CA Government Code Section 18661 (creating a Compliance Unit)
- Experience as Lead Trainer & Subject Matter Expert (e.g., job analysis, exam development, orientation and stakeholder sessions)
- Active committee member developing innovative statewide initiatives and policies

Education and Certifications

- M.A., Industrial/Organizational Psychology, California State University, Sacramento, CA
- B.S., Psychology, Rochester Institute of Technology, Rochester, NY
- Senior Professional in Human Resources (SPHR), Human Resources Certification Institute
- Certified Professional (IPMA-CP), International Public Management Association-Human Resources, in progress
- Labor Relations Academy Masters Certification (CLRM), California Public Employers Labor Relations Association, in progress
- Classification & Compensation, Recruitment & Selection, and Workforce & Succession Planning State Credentials, California Department of Human Resources

Sarah Jansen, B.B.A., Project Consultant

Employment History

- Senior HR Consultant, CPS HR Consulting
- Deputy Human Resources Director I/II; Human Resources Analyst I/II, County of Lake, Lakeport, CA
- Human Resources Assistant; Personnel Clerk (Student Trainee); Office Automation Clerk; US Forest Service, Eureka, CA

Professional Experience

- Advise County departments on the complex human resources matters, including but not limited to, leave of absence, employee performance, classification and compensation, etc.; advise departments on Human Resources related laws, policies, MOUs, etc. Oversee and manage the County's recruitment process
- Supervisory responsibilities, including hiring, training, work coordination, and evaluation
- Involved in numerous aspects of the County classification and compensation system, including advising departments, serving as the primary contact for job description development, performing and/or overseeing salary studies, making salary recommendations, etc.
- Serve as joint administrator for the County's HR information system, and primary system administrator for the County's online recruitment system
- Create, edit, and produce reports from the Human Resources and Payroll systems using specialized software (Cognos Impromptu)
- Oversee various mandated state and federal reports (i.e. EEO 4)
- Served as a member of the County's negotiating team for approximately one year
- Participate in benefits open enrollment for the County
- Responsible for the County's "position control" process - ensuring that only allocated, and funded positions are filled

Education

- Bachelors in Business Administration, Magna Cum Laude, Humboldt State University

Edie Sabia

Employment History

- Consultant, CPS HR Consulting
- Manager, Administrative Office of the Courts, Sacramento, CA
- Director of Personnel Administration, Superior Court of California County of Sacramento
- Payroll Tax Consultant, DIRECTV, Inc., El Segundo, CA
- Director of Payroll Services, California Professional Employers, West Hollywood, CA
- Director of Human Resources and Administrative Services, Express Parts Warehouse, Inc., Raleigh, NC

Professional Experience

- Project work with California State departments, and with CPS HR Consulting, involving development of policies and procedures, organizational assessments, evaluation and recommendation of software solutions, recommendations for process improvements, development of documents and tools for process improvement including implementation and training.
- Provided Administrative Office of the Courts human resource strategic and tactical direction to System Integrator team, Center of Excellence and operational team to ensure that project scope, objectives and business needs, both current and future, were meant for the state wide Superior Court deployment and development of Phoenix, an integrated SAP Human Resource and Payroll management system. Provided expertise as a human resource and payroll subject matter expert to program and project team in developing Phoenix policies, priorities, goals and objectives while fostering knowledge transfer. Identified and reported deficiencies in processes and system design strategy to senior management. Managed special projects to ensure expected results were achieved based on project objectives. Ensured that all past Lessons Learned were addressed in moving forward with all projects.
- As Director of Personnel Administrative Services with the Superior Court of California County of Sacramento management of the Personnel Administration Division included human resource, payroll, labor relations, training, and benefits programs for 900 employees. Planned, organized and directed the work of professional, technical, and clerical staff performing the functions of recruitment, selection, classification, discipline, labor relations, staff development, safety/ergonomics, return to work, position control, training and payroll and benefit administration. Advised Court executives, managers and supervisors on the application of statutes, applicable Rules of Court, policies, procedures, and collective bargaining agreements related to payroll, benefits and human resource. Served as the primary Court liaison between the Court and Sacramento County's human resource, payroll and health benefits departments. Responsible for the development and implementation of appropriate policies, procedures, analyses and reports as required in support of the Executive

Office's goals and objectives. Served as a member of the Court's bargaining team participating in meet and confer and meet and discuss sessions with Unions. Oversaw the continuous enhancement of the Court's staff development programs, consistent with the needs of the Court and the direction from the Administrative Office of the Courts.

- Consulting assignment at DIRECTV with responsibilities that included weekly multi-state tax reconciliation and tax reporting for payroll of 4,000 employees employed by 9 corporations. Duties included assisting payroll management with special projects, daily department functions and all communications with federal and state agencies regarding payroll tax issues.
- Management of the day-to-day activities of the Payroll Processing Division of a Professional Employees Organization (PEO) with 275 clients and 8,500 employees. Responsibilities included supervision of 15 staff engaged in the gathering, compiling, calculating, production, auditing and assembly of payroll checks (20,000 per month) and related reports for distribution to clients. Managed the development and implementation of new products and systems for client sites. Responsible for overseeing the maintenance and development of the Company's in-house payroll database and related system operations. Directed the preparation of payroll data for use in governmental and tax filing for multi-state payroll taxes.
- Directed all human resource and payroll related responsibilities at Express Parts Warehouse, Inc. Company acquired Reddi Brake Supply, Inc. (see below) responsibilities were expanded to include administrative services for warehouse locations and corporate office, management of the accounts payable department and fleet management. Administrative services management included negotiating with vendors, administration of communication system and ordering of all company supplies. Fleet management responsibilities included development of procedures for transfer, registration, record keeping and maintenance of vehicles. Assisted with the expansion of company from 9 locations to 88 locations increasing number of employees from 75 to 450 within 60 days; Reorganized Accounts Payable Department to insure audit controls and efficient and timely processing of transactions, resulted in work force reduction.

Education

- Course work in Accounting and Business, Moorpark College
- Completed numerous professional Human Resource, Payroll and Management development seminars

Igor Shegolev, M.S., SPHR, Technical Specialist

Employment History

- Principal HR Consultant, CPS HR Consulting
- Owner, HR Know Consulting
- Faculty Instructor, University of Phoenix
- Senior Director of Compensation, Carondelet Health Network (Ascension Health)
- Manager of Compensation, Northwest Health System
- Compensation Analyst, Pima and Cochise County Government

Professional Experience

- Served as an independent consultant and expert advisor for various projects related to compensation, classifications, employment databases, record keeping, total rewards, executive compensation, policy development and benefits designs.
- Advised companies and government entities on retirement plan design, executive compensation, development of incentive and variable pay structures, classification structure, HRIS systems and databases. Lead team of independent contractors.
- Taught graduate and undergraduate courses in human resources management, economics, organizational behavior, business ethics and employment law.
- Directed development and implementation of compensation and benefits strategies, policies and practices of the Healthcare Network (three hospitals, surgery group and physician group (4,200 employees); oversaw compensation, benefits and HRIS strategies, policies and practices of the 650- bed nonprofit (3,500 employees) hospital.
- Participated in development of organizational strategy and strategic initiatives as a member of executive team.

Education and Certifications

- M.S., Troy University, Troy, AL
- Member, WorldAtWork
- Member, SHRM-GT
- Member, Arizona Total Rewards Association

Appendix B – Sample Compensation Report

We have included below part of a Sample Compensation Report. The full report is available upon request.



The image shows a sample cover page for a compensation report. At the top left is the logo for CPS HR CONSULTING, which consists of the text 'CPS HR' followed by a stylized graphic of three overlapping horizontal bars in yellow, maroon, and olive green, and then the word 'CONSULTING'. To the right of the logo is a black rectangular redaction box. Below the logo, the date 'November 30, 2017' is printed. In the center, the words 'Private and Confidential' are written in a serif font and underlined. Below this is another black rectangular redaction box. The main title 'Total Compensation Report' is centered below the redaction. On the left side, there is a list of contact information: 'SUBMITTED BY: Jennifer Ramos, Principal Consultant, 241 Lathrop Way, Sacramento, CA 95815, t: 916-471-3125 f: 916-561-8451, www.cpshr.us'. Below this is a list of 'Project Consultants: Alfred Bingham, Edie Sabia, Judy Wallace' and 'Support Staff: Sarah Williams, Lynda Guerra'. On the right side of the page, there is a large, stylized graphic composed of three overlapping, curved shapes in yellow, maroon, and olive green, matching the colors in the logo.

CPS HR CONSULTING

November 30, 2017

Private and Confidential

[Redacted]

Total Compensation Report

SUBMITTED BY:
Jennifer Ramos,
Principal Consultant
241 Lathrop Way
Sacramento, CA 95815
t: 916-471-3125 f: 916-561-8451
www.cpshr.us

Project Consultants:
Alfred Bingham
Edie Sabia
Judy Wallace

Support Staff:
Sarah Williams
Lynda Guerra

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I. Introduction

CPS HR Consulting was retained by the ██████████ (City) to conduct a total compensation study for forty-six (46) benchmark classifications. The objective of the study was to determine the competitiveness of the City's base salary and total compensation in the labor market. To achieve this, CPS HR surveyed the City's established labor market of 10 comparable cities and collected and analyzed base salary and total compensation data. Since the City competes for talent with organizations in the Texas Metroplex area, CPS HR proposed the addition of an eleventh labor market agency, the City of Dallas, to serve as a reference point for comparison with larger cities. However, compensation data from the City of Dallas was skewing results and the data was removed from the study.

CPS HR submitted the first Draft Total Compensation Report on November 3, 2017. Upon the City's review and discussions with CPS HR, a Revised Draft Total Compensation Report was produced on November 20, 2017. CPS HR and the City met twice to debrief the draft results. Additionally, CPS HR was able to include salary and benefits received from agencies after the Draft Report was written. The final report contains the project scope and work plan, describes the methodologies utilized in data collection and analysis, and provides the total compensation results for all survey classifications. The data for this report was collected during the months of September through November 2017. All salary and benefit data is as of October 1, 2017. Three agencies (Corsicana, Ennis, and Mansfield) are omitted from this draft report as CPS HR has been unable to secure responses or verify missing data.

City-wide averages and classification specific results are summarized in Section IV of this report. Survey results for each classification are presented in [APPENDIX – A](#). In addition, other benefits and premium pay elements of interest to the City were collected and are summarized in Section V and details presented in [APPENDIX – B](#).

After commencing the total compensation study in April 2017, the City requested for CPS HR to conduct a city-wide classification study which delayed the start of total compensation study. In July 2017, CPS HR conducted a survey of 15 of the selected benchmark classifications to provide the City with a relative preview of results. CPS HR and the City agreed to start the compensation study while the classification study was being finalized.

II. Project Scope and Work Plan

To complete the total compensation study, CPS HR Project Team completed the following tasks:

- Project Manager, Jennifer Ramos, met with, and clarified the scope of work with the City's Director of Human Resources/Civil Service, ██████████.
- Reviewed City background materials including classification specifications, salary schedules, position control documents, organization charts, and internal alignment documentation. CPS HR referred to the City's FY 2017-18 Compensation Plan, with 3% increases to salary ranges effective October 1, 2017.
- Developed a survey instrument (presented in [APPENDIX - C](#)).
- Received confirmation from the City regarding the 11 labor market agencies, 46 benchmark classifications to be surveyed, and the survey instrument. The City of Dallas was later removed from the study during the revised report to prevent skewing results.
- Due to the time constraints and size of the study, CPS HR determined that the most expeditious way of obtaining data was to gather as much information as possible from online sources and then follow-up with the surveyed agency to validate data and complete missing information.
- Researched salary and benefits data from the respective labor market agencies, including salary schedules, classification specifications, benefits summaries, and position control documents where available. The Project Team followed through with agencies to request further information or clarification on job matching and/or benefits levels.
- Prepared a draft report for client review and comment on November 3, 2017.
- CPS HR and the City met to debrief the draft results on November 8, 2017. The City Manager, ██████████; the Director of Human Resources/Civil Service, ██████████; and the Director of Finance, ██████████, met via conference call with CPS HR Project Manager, Jennifer Ramos.
- CPS HR and the City met again to further debrief the draft results on November 13, 2017. The City Manager, ██████████; the Director of Human Resources/Civil Service, ██████████; and the Director of Finance, ██████████, met via conference call with CPS HR Project Manager, Jennifer Ramos.
- Prepared a revised draft report for client review and comment on November 20, 2017.
- Submitted a final report for client review on November 28, 2017. After a debrief meeting with the City, CPS HR prepared and submitted this revised final report on November 30, 2017.

III. Compensation Study Parameters

The first step in conducting a total compensation survey is to determine the basic parameters for the survey. These parameters included:

- Confirmation of the City's labor market position
- Labor market agencies (comparable agencies)
- Survey classifications (benchmark classifications)
- Survey scope

Labor Market Position

CPS HR provides a labor market data analysis based on the median of the market. The labor market median, which is described as the "middle" of the market, is the data point at which half of the complete range of data (excluding the City's data) is higher, and half of the complete range of data (excluding the City's data) is lower. The median is a common market position, particularly in smaller data sets, because the data is less likely to be skewed by high and low payers in the market.

Labor Market Agencies

The agencies surveyed comprise the City's 10 labor market agencies for all 46 classifications surveyed; the final labor market agencies are listed below in Table 1.

Table 1: Labor Market Cities/Towns

| Labor Market Agency |
|------------------------|
| 1. City of Burleson |
| 2. City of Cedar Hill |
| 3. City of Cleburne |
| 4. City of Corsicana |
| 5. City of Desoto |
| 6. City of Duncanville |
| 7. City of Ennis |
| 8. City of Lancaster |
| 9. City of Mansfield |
| 10. City of Midlothian |

The labor market agencies were selected by the City; CPS HR reviewed the agencies selected based on population, area size, and proximity to the City. CPS HR recommended additional or alternate agencies.

Final Total Compensation Report

The City and CPS HR agreed to add one agency, the City of Dallas, which was later removed from the labor market list. CPS HR also reviewed the cost of living and cost of wages, proximity of the labor market agencies, and services provided in order to identify an appropriate labor market for this study.

Tables 2 and 3 below present other key financial factors such as the cost of living and cost of wages of the 10 labor market agencies respectively. Cost of living and cost of wages considerations help us arrive at sound recommendations as part of total compensation. Cost of living measures the amount of money needed to sustain a certain level of living, including basic expenses such as the cost of housing, food, and taxes in an area. Cost of living is often used to compare how expensive it is to live in one city versus another locale. Cost of wages measures the cost of labor or the sum of all wages paid to employees, as well as the cost of employee benefits and payroll taxes, paid by an employer. Cost of wages often factors in direct and indirect (overhead) costs associated with wages paid by the employer.

Data for the following tables is collected from an Economic Research Institute (ERI) database which compiles salary, cost-of-living, and compensation survey data available with current market data for more than 1,000 industry sectors. Additional information for the database is available upon request.

Table 2 below presents the cost of living in [redacted] in comparison to the labor market agencies, as well as a summary of the United States average of cost of living as a point of reference.

Table 2: Labor Market Cities/Towns Cost of Living

| Comparison City | Base City Income Levels | | | | | |
|---------------------|-------------------------|----------|----------|----------|-----------|---------|
| | \$20,000 | \$40,000 | \$60,000 | \$80,000 | \$100,000 | Average |
| [redacted] | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |
| City of Burleson | 101.8% | 101.4% | 101.1% | 100.9% | 100.8% | 101.2% |
| City of Cedar Hill | 95.0% | 95.9% | 96.4% | 97.0% | 97.5% | 96.4% |
| City of Cleburne | 96.2% | 96.7% | 97.1% | 97.6% | 98.0% | 97.1% |
| City of Corsicana | 93.0% | 94.2% | 95.0% | 95.8% | 96.5% | 94.9% |
| City of Desoto | 99.4% | 99.5% | 99.5% | 99.6% | 99.7% | 99.5% |
| City of Duncanville | 96.3% | 96.8% | 97.2% | 97.6% | 98.0% | 97.2% |
| City of Ennis | 86.2% | 88.6% | 90.0% | 91.6% | 93.1% | 89.9% |
| City of Lancaster | 94.1% | 94.4% | 94.9% | 94.9% | 95.3% | 94.7% |
| City of Mansfield | 102.1% | 101.6% | 101.3% | 101.1% | 100.9% | 101.4% |
| City of Midlothian | 96.1% | 96.8% | 97.2% | 97.6% | 98.1% | 97.2% |

Table 3 presents the cost of wages paid by [redacted] in comparison to the labor market agencies, as well as a summary of the United States average of cost of wages as a point of reference.

Table 3: Labor Market Cities/Towns Cost of Wages

| Comparison City | Base City Income Levels | | | | | |
|---------------------|-------------------------|----------|----------|----------|-----------|-----------|
| | \$24,000 | \$36,000 | \$48,000 | \$72,000 | \$108,000 | \$144,000 |
| [redacted] | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |
| City of Burleson | 97.6% | 96.9% | 96.3% | 95.3% | 94.4% | 94.1% |
| City of Cedar Hill | 100.4% | 100.4% | 100.4% | 100.4% | 100.4% | 100.3% |
| City of Cleburne | 97.8% | 97.1% | 96.5% | 95.6% | 94.6% | 94.3% |
| City of Corsicana | 81.1% | 89.8% | 89.1% | 88.4% | 88.6% | 89.2% |
| City of Desoto | 99.8% | 99.9% | 100.0% | 100.0% | 100.0% | 100.0% |
| City of Duncanville | 99.8% | 99.9% | 100.0% | 100.0% | 100.0% | 100.0% |
| City of Ennis | 99.2% | 99.3% | 99.4% | 99.5% | 99.5% | 99.6% |
| City of Lancaster | 100.0% | 100.0% | 100.0% | 99.9% | 99.9% | 99.9% |
| City of Mansfield | 99.3% | 98.2% | 98.2% | 97.3% | 96.2% | 95.7% |
| City of Midlothian | 100.1% | 100.2% | 100.2% | 100.2% | 100.2% | 100.2% |

Survey Classifications

The survey benchmark classifications for the study are presented below, organized by employee groups (i.e. executive, safety, etc.) with the classifications in alphabetical order. Summary descriptions for all survey benchmark classifications are included in the survey instrument displayed in [Appendix C](#).

- Accounts Payable Technician
- Animal Control Officer
- Assistant Director of Senior Citizens Center
- Budget Analyst
- City Engineer
- City Manager
- City Marshal
- City Secretary
- Code Enforcement Officer
- Director of Civic Center*
- Director of Convention and Visitors Bureau*
- Director of Downtown Development*
- Equipment Operator
- Event Coordinator
- Field Supervisor
- Fire Chief
- Fire Pump Engineer
- Firefighter
- GIS Analyst^
- HR Technician^
- Maintenance Technician
- Meter Maintenance Utility Worker
- Municipal Court Clerk
- Planner
- Police Chief
- Police Dispatcher
- Police Lieutenant
- Police Patrol Officer
- Public Information Officer
- Public Works Inspector
- Senior Administrative Secretary^
- Senior Building Inspector

Final Total Compensation Report

| | |
|--|---------------------------|
| Senior Director, Building & Community Services | Senior Director, Utility |
| Senior Director, Economic Development | Senior Mechanic |
| Senior Director, Finance | Senior Payroll Technician |
| Senior Director, Human Resources/Civil Service | Utility Billing Clerk |
| Senior Director, Parks & Recreation | Utility Plant Operator |
| Senior Director, Planning | Utility Worker |
| Senior Director, Public Works | Water Quality Specialist |

^ Represents a new classification level proposed by CPS HR.

* Insufficient comparable classifications

Survey Data Collection Scope

Comparable Classifications – Classification Matching

When conducting a salary survey, the intent is to provide general market trends by comparing the span of control, duties and responsibilities, and knowledge, skill and ability requirements to determine whether these are comparable enough to utilize as a match. With a balanced labor market and the use of whole job analysis, it is reasonable to assume that while some matches will have slightly higher responsibilities and some matches will have slightly lower responsibilities, the overall scope of duties and responsibilities of the combined matches will be balanced.

In the process of matching comparable classifications from other agencies, CPS HR does not only rely on classification specifications. CPS HR references position control documents, where available, to specifically identify which classification, and level of classification, perform the duties of the City's classification. This is particularly relevant to non-supervisory, non-management classifications where there are multi-level classifications within the series matched from the other agencies. This level of analysis is important because classification specifications may describe a certain level of work, for example, as the journey level, when the use of the classification series demonstrates that the majority are assigned to a higher level, which may be described in the classification specification as an advanced level in the classification series. In addition, block budgeting or other fiscal tools facilitating series progression through multiple levels, may provide greater flexibility in the use of the classification structure than is evident in the content of the classification specification. To the extent possible, CPS HR identifies the operational use of a classification, irrespective of how it is defined in the classification specification, in the determination as to whether it is a comparable job match.

Comparable Classifications – Required Number of Comparable Classifications

CPS HR's best practice is that benchmark positions must have a minimum of three classification matches to be analyzed. In most studies, it is common to have some classes for which limited market data exists. Because a compensation plan is developed through the analysis of external market data and internal relationships, the absence of sufficient labor market data for a particular classification does not mean

that no salary recommendation can be developed, since many salary recommendations are ultimately based upon internal equity with other classes.

There are many reasons a benchmark class may not have enough comparable data including:

- Differences in the delivery of services
- Differences in span of control
- Differences in organizational structure
- Differences in operational size
- The classification is not commonly found in other agencies
- Agency does not provide that service

Labor Market Benefits Collected

CPS HR collected numerous benefits and compensation practices, in addition to base salary, to complete the total compensation evaluation of the City in the labor market. When measuring the market, the goal is to identify an agency’s competitive position in the labor market to attract and retain talent, in addition to promoting internal equity. This is done by measuring those benefits that new employees would currently receive upon their date of hire. In addition, reported benefits and premium pay are those which all employees in the group would qualify for, versus premium pay provided to a limited group of employees, such as shift differentials, or assignment pay.

The benefits data collected for the study is presented in Table 4 below.

Table 4: Total Compensation Benefit Data Collected

| Benefit or Pay Practice | Description |
|--|---|
| Comparable Classification Title | CPS HR matched the City’s benchmark classifications to those in the labor market agencies. The methods used by CPS HR for matching classifications is discussed in the previous section. The term “No Comparable Class” is used CPS HR did not find a comparable classification within an agency to a specific benchmark classification. No compensation data will be presented for the benchmark classification for that agency. |
| Minimum and Maximum Base Salary | The minimum and maximum <i>monthly</i> base salary. Where salary range was not available. |

Final Total Compensation Report

| Benefit or Pay Practice | Description |
|--|---|
| Deferred Compensation Contribution | The amount(s) the agency pays into a deferred compensation plan; in many cases, this is a voluntary employee benefit. |
| Longevity Pay Practice | The amount(s) the agency pays for years of service with the agency; for this analysis, CPS HR has used the 10-year level for eligible employees, as this is a more common achievement. Longevity pay at the 10-year mark was calculated into total compensation only if it was an increase to base pay, not a one-time payout. |
| Education Incentive Pay Practice | The amounts the agency pays for the acquisition of education above that which is required for the classification. |
| Certificate Incentive Practices (Safety) | The amounts the agency pays for Intermediate, Advanced, or Master certificate/degree for Police Officer and Lieutenant, Firefighter and Fire Pump Engineer. |
| Medical Plan Contributions | <p>Medical Insurance plan – For standards purposes, the family rate for the <i>most commonly used</i> plan is measured in the market. In some agencies, a flat employer contribution rate is utilized, regardless of the plan selected by employees.</p> <p>Dental Insurance plan – For standards purposes, the family rate for the most commonly used plan is measured in the market. If no amount is entered in the datasheets, the cost may be included in the medical plan costs or the agency does not offer or contribute towards a dental benefit (the benefits summary tables will provide more detail on this).</p> <p>Vision Insurance plan - For standards purposes, the family rate for the most commonly used plan is measured in the market. If no amount is entered in the datasheets, the cost may be included in the medical plan costs or the agency does not offer or contribute to a vision benefit (the benefits summary tables will provide more detail on this).</p> <p>Life Insurance – Whether the agency offers or pays for Life Insurance.</p> <p>Long Term Disability – Whether the agency offers or pays for Long Term Disability.</p> |
| Retirement Contribution | Employer’s contribution to mandated retirement plans, such as the Texas Municipal Retirement System (TMRS). |
| Social Security (Medicare and FICA) Contributions | These amounts reflect the cost of the employer’s contributions to Medicare (1.45%) and FICA (6.20% to maximum of \$118,500 for FY 2017), if the agency participates. |
| Leave Practices | For standards purposes, leave practices reflect leave accrual rates and maximums at one, five, ten, fifteen and 20 years; sick leave accrual rates and maximums; holiday hours, and any administrative leave allotted to employees. |

IV. Survey Results

Labor Market Agency Responses

Critical factors impacting agency participation in the survey included: (1) the availability (transparency) of key compensation and benefit data (i.e. approved budget, job descriptions, salary plan, personnel rules and regulations, etc.) on the agency website or from other public information sources (e.g. Texas Municipal Retirement System); and (2) the availability and willingness of agency personnel to assist with completing the surveys and/or verify completed surveys.

Of the 10 agencies on the approved labor market list, three (3) did not have necessary data available publicly for CPS HR to complete the surveys for this draft report. Further, when contacted by CPS HR consultants, many indicated a lack of available personnel to assist in completing the survey. As of the original draft report on November 3, 2017, CPS HR had responses from the cities of Corsicana and Mansfield that information may be provided soon; the City of Ennis has not responded to CPS HR inquiries. No information was received from the three agencies to include in this revised report. Additionally, as mentioned, the City of Dallas was removed from the study. Thus, this draft report represents the data from only seven (7) labor market agencies.

Table 5: Labor Market Agency Response Status

| Labor Market Agency | Response Status as of 11/28/2017 |
|---------------------|----------------------------------|
| City of Burleson | Complete |
| City of Cedar Hill | Complete |
| City of Cleburne | Complete |
| City of Corsicana | No response |
| City of Dallas | Removed |
| City of Desoto | Complete |
| City of Duncanville | Complete |
| City of Ennis | No response |
| City of Lancaster | Updated salary and benefits |
| City of Mansfield | No response |
| City of Midlothian | Complete |

Benchmark Comparable Classification Requirement

As indicated in the previous section, the survey involved the collection of total compensation data for the City's survey classifications from each of the selected labor market agencies. Three classifications did **not** meet the requirement of three comparable classifications and thus are individually calculated and not included in the overall City-wide results. These positions include Director of Civic Center,

Final Total Compensation Report

Director of Convention and Visitor's Bureau, and Downtown Development Director. They are excluded from the City's overall results and presented separately below.

All data is as of October 1, 2017 and detailed results and analyses are discussed below.

Compensation Results

The City's overall position within the labor market, and the averages for each classification, are presented in this section. Appendix A and B provide detailed results as described below.

Appendix A presents all study classifications with total compensation results. Classifications are presented in alphabetical order.

Note: The designation of "No Comparable Classifications" is used if an agency reported no comparable classification, or if a review of the duties and responsibilities assigned to the classification indicated that it was not comparable, or if the duties were significantly split among more than a single classification. The designation of "Data Not Available" indicates a match was identified but salary could not be obtained.

[Appendix B](#) presents the collected benefit information for all employee groups. An analysis of these benefits is presented in Section V.

Note: The designation of "Not Applicable" (N/A) is used if an agency does not provide a benefit; the designation of "Data Not Available" (DNA) is used if an agency did not provide the needed information.

Comparable Classifications Results

CPS HR notes that the following classifications in this survey have special considerations with respect to the job matching strategy and/or results for some classifications is presented below.

- **Director of Civic Center** – The job matching strategy for this classification was to identify positions with duties and responsibilities related to overseeing multipurpose facilities/venues that are utilized for a variety of civic, recreation or entertainment purposes. At some agencies these types of operations may be provided under Parks & Recreation Department or contracted to a third-party operator.
- **Director of Convention and Visitors Bureau** – The job matching strategy for this classification was to identify positions with duties and responsibilities related to marketing and attracting visitors/businesses to the City to enhance commerce, tourism, economic development, etc. At some agencies these types of operations may be contracted to a third-party operator.
- **Director of Downtown Development** – The job matching strategy for this classification was to identify positions with specific duties and responsibilities related to marketing and attracting visitors/businesses to the Main Street area to enhance commerce, economic development, etc.

██████████
Final Total Compensation Report

At some agencies these types of operations may be contracted to a third-party operator or part of the Economic Development Department.

Comparable Classification Salary Considerations – No Minimum/Maximum Salaries

For some executive level positions, agencies provided the current actual salary and not a salary range. In these cases, those comparable classifications were omitted from calculations as they skewed the mid-points. Salaries for these comparable classifications are provided in the datasheets for comparison. Table 6 below identifies the benchmark classifications with this exception, the original number of matches, number omitted due to actual salary not range, and final number of matches in calculations.

Table 6: Classifications with Matches Omitted Due to No Minimum/Maximum Salaries

| | Total Matches | Omitted Matches | Calculated Matches |
|--|---------------|-----------------|--------------------|
| City Engineer | 7 | 1 | 6 |
| City Secretary | 5 | 1 | 4 |
| Fire Chief | 7 | 3 | 4 |
| Police Chief | 7 | 3 | 4 |
| Public Information Officer | 4 | 1 | 3 |
| Senior Director, Economic Development | 5 | 2 | 3 |
| Senior Director, Finance | 6 | 2 | 4 |
| Senior Director, Human Resources/Civil Service | 7 | 3 | 4 |
| Senior Director, Parks & Recreation | 6 | 2 | 4 |
| Senior Director, Public Works | 7 | 3 | 4 |

Additionally, while the City provided a salary range for the classification of City Manager, only current salaries were available from all comparable agencies. For this reason, the City Manager is not calculated using the mid-point. The City’s maximum salary was used in calculations.

Labor Market Position

This section provides a summary of the City’s position within the labor market by classification. Table 7 provides the following information for each classification and is arranged alphabetically. The tables identify the City’s survey classification and number of comparable classifications identified within the analysis. The following data and calculations are presented for both base salary and total compensation.

- The City’s minimum, maximum, and mid-point monthly salary for the survey classification.
- The labor market median and mean monthly mid-point salary which is calculated using the mid-point of the minimum and maximum monthly salary for each of the comparable classes; that range of data is then computed to provide the median or mean amount.
- The percentage the City’s mid-point monthly salary is above or below the labor market median and mean mid-point; this number indicates what percentage of the City’s salary is required to

move it up or down to the market median or mean.

Use of Mid-point vs. Maximum Salary

CPS HR usually presents compensation data and calculations using the monthly salary maximum collected for job matches in the labor market in relation to the client's maximum salary. However, at the request of the City ██████████, compensation data and calculations are represented using salary mid-points in this report. This is due to the disparity in salary ranges common in the Texas market, primarily in non-safety classifications. CPS HR found that agencies in ██████████ labor market have a difference of up to 50% from the minimum to maximum salary range in non-safety groups. The City's Civil Service classifications typically have much narrower salary ranges.

Civil Service Mid-Point Exceptions

Civil Service classifications (i.e., Firefighter, Fire Pump Engineer, Police Officer, and Police Lieutenant) used as benchmarks in this study do not seem to utilize the mid-point like the City's other benchmarks.

- Firefighter pay ranges from entry level to five years. The City's salary schedule indicates a mid-point and implies increases happen yearly up to the incumbent's 5th year.
- Fire Pump Engineer has no pay range, just a monthly salary of \$5,832.95.
- Police Officer pay ranges from entry level to five years. The City's salary schedule indicates a mid-point and implies increases happen yearly up to the incumbent's 6th year.
- Police Lieutenant pay ranges from entry level and three years. The City's salary schedule indicates a mid-point and seems to imply the only increase happens at year three.

Salary ranges for the City's Civil Service classifications should continue to be handled separate from the non-civil service groups.

The request for use of mid-points stems from the City's belief that mid-points are a better measure of current employer labor costs and actual salaries rather than maximum salary ranges for non-safety classifications in the Texas market. Further compounding the issue in the City is the lack of a formal policy or standard mechanism for moving employees through the 50% salary ranges. According to information collected during the classification study from Position Description Questionnaire (PDQ) interviews and the Director Feedback Survey (distributed at the original onset of the compensation study earlier this year), City employees view the salary maximum as unattainable. City management and employees in multiple departments said that employees may not reach the maximum salary range during their careers due to having no formal policy in place for consistent and fair salary movement under the current practice. The City requested a recommendation from CPS HR on how to address salary structure movement by conducting research in the labor market and referring to best practices. The topic of employee movement within a salary range is addressed in the recommendation section of this report.

PROPOSAL

Truckee Tahoe Airport District

Classification Study (Part B)

RFP

Due: Monday, May 31, 2021

5:00 pm PT

PROPOSAL CONTACT:

VICKI QUINTERO BRASHEAR

Director of Products and Services

CPS HR Consulting
2450 Del Paso Road, Suite 220
Sacramento, CA 95834
P: 916-471-3481
vbrashear@cpsshr.us
Tax ID: 68-0067209

www.cpsshr.us



Your Path to Performance

Transmittal Letter

May 31, 2021

Lauren Tapia, Human Resources Manager
Truckee Tahoe Airport District
10356 Truckee Airport Road
Truckee, CA 96161

Subject: Request for Proposal - Classification Study (Part B)

Submitted via email to Lauren.Tapia@TruckeeTahoeAirport.com

CPS HR Consulting (CPS HR) is pleased to submit this proposal to the Truckee Tahoe Airport District (District) to provide comprehensive classification study services for the District's employees. With a rich history of assisting government agencies with their classification and compensation studies, we at CPS HR are confident that we can provide expert solutions to meet the District's requirements and objectives.

Our Understanding of the Scope of Work

CPS HR understands that the District is seeking a consulting firm to conduct a District-wide classification study. Our approach to classification consulting can be summarized in the following statements:

- CPS HR fully understands that classification studies require an iterative, collaborative, and flexible approach. Our work plans are designed to be inclusionary and collaborative with all stakeholders.
- Classification systems should be designed to serve as a foundation for an organization over many years. We believe our greatest strength is our ability to work with our clients to develop systems that will adapt to changing operational and economic conditions.

These approaches, along with our methodology, will support the District's goal of attracting and retaining high quality staff while maintaining internal equity of the classification system.

This budget assumes:

- Classification study:
 - Up to **21** classifications and up to **25** incumbents
 - FLSA review and physical environment analysis
 - Job description update
 - Incumbent allocations

At CPS HR, we pride ourselves in establishing and nurturing long-term relationships with the agencies we serve as we live out our mission of bringing excellence in Human Resources to the public sector. We look forward to the opportunity to work with the District on this important project and to partner with your organization into the future.

Our Commitment to Project Success

Capacity and Availability

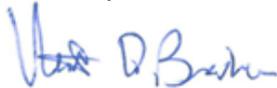
The designated project team is available to integrate project assignments into their existing workload. We pledge our commitment to perform this work in an efficient and timely manner for any and all of the services we present in our workplan provided in this proposal. Our CPS HR Project Team will focus on maintaining open communication with the District’s designated staff to ensure that this project preserves its focus, the District’s objectives are met, and all deliverables adhere to the confirmed timeline and budget.

| CONTACT INFORMATION | |
|---|---|
| Proposal/RFP Process Contact and Contract Authorized Representative | Vicki Quintero Brashear, Director of Products and Services (916) 471-3481; vbrashear@cps hr.us |

Thank you for this opportunity; we very much look forward to working with the Truckee Tahoe Airport District. Should you have any questions, please do not hesitate to contact *me at the contact information above*.

I have the authority to bind CPS HR Consulting into contract. All conditions contained in this proposal, including all pricing quotes, shall be irrevocable for a period of sixty (60) days from the Proposal Opening Date of May 31, 2021.

Sincerely,



Vicki Quintero Brashear
Director of Products and Services

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Proposer Qualifications

About CPS HR Consulting

CPS HR is an innovative, client-centered human resources and management consulting firm specializing in solving the unique problems and challenges faced by government and non-profit agencies. As a self-supporting public agency, we understand the needs of public sector clients and have served as a trusted advisor to our clients *since 1985. Our mission is to promote human resource excellence in the public sector and our vision is to enable people to realize the promise of public service.*

| ORGANIZATION IDENTIFICATION INFORMATION | |
|---|---|
| Legal Name and DBA | Cooperative Personnel Services dba CPS HR Consulting |
| Main Office | 2450 Del Paso Road, Suite 220, Sacramento, CA 95834 Main: (800) 822-4277; FAX (916) 263-3613 <i>*Primary location from which services will be provided.</i> |
| Regional Offices | 100 Congress Avenue, Suite 2000, Austin, TX 78701 4 West Dry Creek Circle, Suite 100, Littleton, CO 80120 1968 S. Coast Hwy # 961, Laguna Beach, CA 92651 |
| Years in Business | Established 1985 |
| # of FTEs | 89 |
| Type of Organization | Joint Powers Authority (Public Agency) |
| State/County Registration #s | As a California JPA with federal income tax exemption under IRS Code Section 115, CPS HR is exempt from most Local and State taxes. |
| Federal Tax ID#/TIN/EIN | 68-0067209 |
| Website | www.cpshr.us |

CPS HR’s core competency is its knowledge of and expertise in the public sector. As a public agency, we understand the challenges and issues facing our client base. We provide best practice expertise that is unique because CPS HR believes in an integrated, systems-based approach to human resources. Our consultants understand that the multiple functional human resources disciplines (including classification and compensation) work together to foster an optimal Human Resource system.

CPS HR CONSULTING SERVICES

ORGANIZATIONAL STRATEGY

- Workforce & Succession Planning
- Organizational Assessment
- Organizational Redesign and Re-Engineering
- Performance Management
- Employee Engagement
- Change Management
- Diversity, Equity & Inclusion

CLASSIFICATION AND COMPENSATION

- Classification
- Compensation

GENERAL HR SERVICES

- HR Outsourcing
- Complaint Investigations

TESTING, RECRUITMENT & SELECTION

- Job Analysis
- Assessment Center Services
- Executive Search
- Recruitment Solutions
- Test Development*
- Test Administration*

*(for employment and licensing certification)

TRAINING AND DEVELOPMENT

- Training Courses & Programs
- Executive Coaching
- Accelerated Leader 360° Assessment™
- Leadership Development

Distinguishing Characteristics

Depth of experience working in public agencies. CPS HR is a joint powers authority, and as such, our charter mandates that we provide services exclusively to public agencies and non-profits. CPS HR has conducted hundreds of classification and compensation related studies for cities, counties, courts, special districts, water and utilities, and higher education institutions.

CPS HR staffing. CPS HR employs only the best staff members. Many of our staff have both public and private classification and compensation experience, they are diligent in their work, listen to and understand the needs of our clients, and possess advanced education and certifications such as **SHRM, IPMA, World at Work**, etc.

Use of best practices. CPS HR applies best practices and utilizes proven classification and compensation principles in all our engagements.

Quality and tailored services. CPS HR delivers quality and tailored classification and compensation services to better meet each client's unique study goals and objectives.

Extensive Experience

CPS HR has been providing classification and compensation services to state, federal, and local governments along with special districts and non-profit organizations for 35 years.

We have performed many studies with agencies of similar size and scope as the Truckee Tahoe Airport District. Additionally, the references and project list we have included in this proposal provide further clarity around the type of classification and compensation projects with which we have worked. With these examples, we have shown how we have collected data, performed analyses on said data, made recommendations, and worked successfully with our partners/clients.

Project List

We have conducted hundreds of classification and compensation studies for municipal agencies, special districts, and higher education. Due to the significant number of projects, we provided a partial list of public agencies for which we have provided classification and compensation services below.

Partial Five-Year Listing

| Partial Public Agency Classification and Compensation Five Year Listing | |
|---|--|
| *CPS HR has provided multiple services to these agencies | |
| Alameda Corridor East Construction Authority | Monterey, County of* |
| Amador-Tuolumne Community Action Agency | Montgomery College, MD |
| American Canyon, City of* | Napa County Transportation & Planning Agency |
| Anaheim, City of* | Oakdale, City of |
| Ashland, City of | Ontario, City of* |
| Association of Bay Area Governments* | Orange, County of* |
| Austin Energy | Petaluma, City of |
| Bell, City of* | Placer, County of* |
| Berkeley, City of* | Rancho Cucamonga, City of |
| Bernalillo, County of* | Redding, City of (Electric Utility) |
| Brawley, City of | Regional Transportation Commission, NV |
| California Bureau of State Audits | Rio Dell, City of* |
| California Dept of Corrections and Rehabilitation | Rocklin, City of* |

| Partial Public Agency Classification and Compensation Five Year Listing *CPS HR has provided multiple services to these agencies | |
|--|--|
| California Department of Energy | Roseville, City of (Electric Utility Department) |
| California Department of Food and Agriculture | Sacramento Municipal Utility District |
| California Department of Human Resources | Sacramento, County of* |
| California Department of Real Estate | Safety Center, Inc. |
| California Office of the Chief Information Officer | San Diego County Water Authority |
| California Seismic Safety Commission | San Joaquin Regional Rail Commission |
| California State University, Sacramento | San Joaquin, County of* |
| Clark, County of* | San Luis Obispo, County of |
| Contra Costa, County of | Santa Cruz Metropolitan Transit District |
| Cucamonga Valley Water District | Santa Cruz Regional Transportation Commission |
| Eureka, City of | Santa Cruz Unified School District |
| Glenn, County of* | Sierra Nevada Conservancy |
| Greater Los Angeles County Vector Control District | Stanislaus, County of* |
| Housing Authority of Santa Clara | State Bar of California |
| Imperial, County of | Superior Court of California, Orange County |
| Jurupa Community Services District | Tehachapi, City of |
| Long Beach Unified School District* | Temecula, City of* |
| Long Beach Water District | University of the West* |
| Los Angeles Co Employees Retirement Assoc.* | Ventura, County of* |
| Los Angeles Department of Water and Power | Vista, City of* |
| Madera, City of | Waxahachie, City of |
| Mojave Water Agency* | Western Area Power Administration |
| Monterey Peninsula Airport District | Yosemite Community College* |

References

Agency Name: Santa Clarita Valley Water Agency, CA

Contact: Aristeia Mantis, Human Resources, Supervisor; (661) 297-1600 ext. 235; amantis@scvwa.org

Contract Amt: Multiple, ongoing

Service Date: 2019 – 2021

Services: Provide classification and compensation studies for single class or department wide projects.

City of Temecula (2018 - Current)

Address: 41000 Main Street, Temecula, CA 92590

Contact: Isaac Garibay, HR Manager; (951) 302-4150; isaac.garibay@TemeculaCA.gov

Services: Provide classification and compensation studies for single class or department wide projects.

City of Cathedral City (2017)

Contact: Eugenia Torres, HR Manager; (760) 770-0317; ETorres@cathedralcity.gov

Address: 68700 Avenida Lalo Guerrero, Cathedral City, CA 92234

Services: Engaged to determine if the Environmental Conservation and Public Works Manager position was comparable to the Facilities and Field Superintendent position. In addition to having the incumbent complete a Position Description Questionnaire, our team conducted in-depth phone interviews with both the incumbent and incumbent's supervisor, developed class specifications, and reviewed existing data provided by the City. Based on our recommendations, the City ultimately chose to move the Facilities and Field Superintendent classification to Public Works. In addition, the CPS HR team updated the class specifications for the Facilities and Field Superintendent classification.

Key Personnel

We have a uniquely qualified team of professionals who are readily available to assist the District with its studies. Our CPS HR Project Team will focus on maintaining open communication with the District's designated staff to ensure that this project preserves its focus, the District's objectives are met, and all deliverables adhere to the confirmed timeline and budget.

Project Manager

We have selected **Ms. Michelle Garbato, M.A., SPHR** to serve as Project Manager and Point of Contact for the District during the engagement. The Project Manager's role will be to work directly with the District's Internal Project Manager to (i) ensure the District's study needs and goals and objectives are understood and accurately communicated to District management, other key stakeholders, and the CPS HR Project Team; (ii) conduct client meetings; (iii) be responsive to all client requests; (iv) manage the work of the CPS HR Project Team; (v) meet timeline and budget expectations; (vi) conduct quality control of deliverables; and (vii) meet/provide information/present results to the District.

Ms. Garbato brings over 13 years of progressive experience in public sector human resources at the state and local levels. A consultant and change agent, she has extensive experience partnering with clients and creating and implementing innovative solutions to attract and retain highly qualified employees. She has a talent for managing large scale projects while balancing multiple stakeholder interests and ensuring quality and compliance. She has led statewide initiatives impacting over 200 state agencies and has been responsible for upholding the merit principle for over 220,000 employees. A firm believer in professional growth through education and training, she remains active within the field and holds various human resources certifications and credentials.

Account Manager

Mr. Justin Chaudoin will serve as the local Account Manager for this project. His role will be to work directly under the CPS HR Project Manager and with the District's Internal Project Manager to support all project goals and objectives and allow for a cost-effective approach to more frequent in-person meetings and presentations. Mr. Chaudoin joins CPS HR from the City of San José where he served as the Human Resources Manager for the Department of Parks, Recreation, and Neighborhood Services, which is the second largest department in the City. While with the Department, he oversaw the Employee Services unit which included Recruitment, Training and Development; Employee Engagement; Employee Relations; Investigations; Progressive Discipline; Labor Relations; Workers Compensation; Return to Work; Interactive Process; Classification and Compensation; and Payroll/Timekeeping. He was also responsible for the development and successful implementation of key initiatives to create a lasting shift in organizational culture, such as the development of the Department's Leadership Principles. He has a proven track record in developing and maintaining effective communications and working relationships between management, employees, Union representatives, and inter-agency stakeholders. In addition to his time with the City of San José, he has held key management roles in the private sector and served as an aviation officer in the U.S. Army for over seven years.

Consultants and Roles

CPS HR has a uniquely qualified team of professionals to assist the District with its studies. Ms. Garbato will be joined by Project Consultant **Sarah Jansen** and Technical Specialist **Igor Shegolev**.

Each of the team members has broad and deep experience in public sector classification and compensation systems and analysis and are readily available to assist the District with this project. We are committed to meeting the highest professional standards of quality.

Full résumés are provided under **Appendix A**.

| PROPOSED CPS HR TEAM—STAFF ROLES AT A GLANCE | |
|--|--|
| CPS HR Consultant Name, Title, Location | Responsibilities |
| Michelle Garbato, MA, Project Manager | <ul style="list-style-type: none"> ● Develops and ensures the project plan is in alignment with needs of the District ● Manages costs by ensuring project remains within the appropriate scope and expenditure targets ● Acts as primary client liaison and interfaces directly with client representatives ● Defines the direction of the team on the project ● Uses reports and status meetings to control progress/address hurdles ● Ensures project is delivered within budget and scope and on time ● Ensures compliance with terms and conditions of contract ● Checks all deliverables for accuracy and correctness |
| Sarah Jansen, Project Consultant | <ul style="list-style-type: none"> ● In concert with Project Manager, reviews and provides feedback on the project plan and methodologies ● Responsible for the development of all project deliverables ● Uses reports and status meetings to control progress/address hurdles; conducts quality control ● Physical environment analysis |
| Igor Shegolev, Technical Specialist | <ul style="list-style-type: none"> ● Focused on internal alignment of classifications and FLSA analysis |

A description of our proposed project approach, work elements, and deliverables for all phases are included in the following section, **Approach to the Project**. A Fee Estimate by work task is provided under the **Cost Proposal** section.

Approach to the Project

Classification Study Work Plan

Following is our methodology and proposed work plan. Specific details, e.g., number of interviews or meetings, for each task follow each one. A table depicting hours per task, staff level assigned, and itemized costs are provided under the **Cost Proposal** section.

Task 1 – Receive and Review Background Materials. Upon contract execution, CPS HR will gather background information including the following materials:

- Organizational Charts
- Classification Specifications (Electronic copies)
- Relevant Policies and Procedures
- Memorandums of Understanding, as applicable
- Past Classification and Compensation Studies
- District’s Mission, Vision, and Values statements

Client Responsibilities and/or Pricing Assumptions Associated with Task:

- The client will upload electronic copies of all documents to a shared online site to be provided by CPS HR.

Task 2 – Initial Project Meeting. The CPS HR Project Manager will meet with the District’s Internal Project Manager, HR Staff, and designated key stakeholders to initiate the project by confirming study goals, objectives, tasks to be performed, and methodologies. During this meeting, CPS HR and the District will also discuss and agree upon a communication plan for this study, since open and consistent communication is a key element in project acceptance and success.

Task 3 – Develop Job Evaluation Tool. CPS HR will use a survey tool to ensure valid information is gathered, analyzed, and documented consistently from incumbents regarding their current classifications. This activity includes finalizing a Position Description Questionnaire (PDQ) for approval by the District, and distribution of the PDQ to study participants. The PDQ is designed to capture specific information, and to be used in studies with multiple analytical goals such as position allocation and classification specification development/revisions.

Client Responsibilities and/or Pricing Assumptions Associated with Task:

- For purposes of creating a cost-effective response, our pricing assumes the District will utilize CPS HR’s PDQ with minor (3-4) edits. Additional hours spent on the task will be contracted separately.

- The PDQ will be provided in English in an online survey format. All surveys must be completed online. Should any employees not have online access, we will discuss varying approaches to the completion of the PDQ which may result in increased pricing for this task.

Task 4 – Conduct Orientation Session. The CPS HR Project Manager will draft a letter to be sent via e-mail to all employees included in the study and invite them to attend a study orientation session. The purpose of the orientation session is to (i) communicate study goals, methodology, and processes; (ii) provide the PDQ and explain to employees how the document should be completed; (iii) explain the role of employees, supervisors, and managers in the study; and (iv) respond to employee questions regarding the study process.

These tasks and processes are critical in gaining employee understanding, trust, and acceptance of the study. Where possible, we encourage human resources staff to attend the meeting(s) to familiarize themselves with employee questions and the responses to those questions.

Client Responsibilities and/or Pricing Assumptions Associated with Task:

- For purposes of this scope of work, we have planned for one (1) one-hour **virtual orientation sessions** to be conducted **via videoconference**, one of which can be recorded by CPS HR for viewing by individuals who are not able to attend the scheduled sessions.

Task 5 – PDQ Completion. Incumbents will have the opportunity to provide information on the duties and responsibilities as it relates to job specifications, duties not covered in the job specification, minimum qualifications, and working conditions and physical environment. Each incumbent’s supervisor will then review the collected data to ensure that the incumbent has accurately and sufficiently captured all pertinent information on job context and work output.

Client Responsibilities and/or Pricing Assumptions Associated with Task:

- All PDQs will be completed online, including supervisor and manager comments/approval.
- Links to surveys will be sent via e-mail by CPS HR. A complete and accurate roster, including employee name and e-mail address (among other data points) and supervisory relationships, will be uploaded to the shared online site by District staff using a Microsoft Excel template provided by CPS HR.
- **Responsiveness of study participants is absolutely critical to maintaining the agreed timeline.** An amended timeline will be provided by the CPS HR Project Manager if the online PDQ completion date is pushed out. Any contract amendment needed due to timeline shift will be discussed with the District at the appropriate point.

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

Client Responsibilities and/or Pricing Assumptions Associated with Task:

- For purposes of creating a cost-effective response, our pricing assumes that:
 - up to **80%** of incumbents will provide completed PDQs. Therefore, project staff will review up to **20** returned PDQs
 - project staff will create interview questions for up to **70%** of the respondents (or **14** incumbents)
 - up to **8** supervisor interviews will be conducted
 - CPS HR Project Team members will develop an interview schedule in coordination with the District. CPS HR will also set up an online scheduling system for incumbents to view the schedule and sign up for his/her preferred time slot.

Task 7 – Conduct Job Evaluation Interviews. In addition to the PDQs, job evaluation interviews will be conducted with incumbents to ensure the CPS HR Project Team has a complete understanding of the duties and responsibilities assigned to each position. Incumbents to be interviewed, or invited to participate in a focus group, is typically determined during the PDQ review. Additionally, interviews with supervisors or managers may also be held to further clarify information documented on their subordinate employees' PDQs. For planning purposes, each interview session will take up to sixty (60) minutes via video or telephone conference.

For purposes of this costing, reschedules for missed interviews has not been estimated.

Task 8 – FLSA Analysis. The CPS HR Project team will analyze the duties and responsibilities of each classification and provide recommendations to ensure compliance with the Fair Labor Standards Act (FLSA) exempt/non-exempt designations. Each classification will be reviewed based upon the duties, responsibilities, scope of authority, and span of control for purposes of determining whether it is exempt or nonexempt from FLSA overtime provisions. CPS HR offers two options: Classification-based or Position-based FLSA Analysis. For this project, we will conduct a Classification-based FLSA Analysis.

Classification-based FLSA Analysis. CPS HR Consulting will review the current classification specifications to determine whether the studied classification can be exempt from FLSA overtime provisions. CPS HR will make the determination based upon updated classification specifications.

Task 9 – Physical Environment Review. The CPS HR Project Team will review each classification's core functions. CPS HR will prepare a questionnaire as part of the data collection effort to gather information about the physical demands and working conditions. In addition, the CPS HR Project Team will capture data through the PDQs about core functions.

Task 10 – Analyze Classification Data. The CPS HR Project Team will analyze all information collected from the incumbents and their supervisor, and any job evaluation interviews to identify the job level, scope, typical duties, requisite knowledge, skills, abilities, and other job-related characteristics of each position. This analysis will be used to develop recommendations regarding classification concepts and a classification structure that aligns with current business needs.

Classification concepts serve as the foundation for a classification plan by identifying the nature and level of jobs, with clear definitions of the differences between them. Classification concepts will also provide the framework for the consolidation of existing classifications, the elimination of classifications and/or the creation of new classifications where appropriate, and the revision and development of classification specifications to ensure they properly identify scope and level of authority relative to other classifications and to ensure that there is consistent titling within the classification plan. Classification concepts include:

- Definition of classification levels, such as entry, journey, advanced journey, and supervisory
- Definition of nature of work such as clerical, technical, professional, supervisory, and management
- Titling protocols and standards within the classification structure
- Flexible staffing, where applicable
- The use and application of common classification allocation factors such as decision-making, scope and complexity, contact with others, supervision received and exercised, and knowledge, skills, and abilities

Upon completion of the classification analysis, CPS HR will deliver:

- Classification Structure – Development of a recommended classification structure for the District, with a crosswalk of any changes from the current structure

Client Responsibilities and/or Pricing Assumptions Associated with Task:

- CPS HR will provide a classification specification template via the shared online site if the District does not already have one that must be utilized.

Task 11 – Prepare, Submit, and Present Draft Classification Report. The CPS HR Project Team will prepare a draft classification report which will include the methodology, findings, and recommended changes to the classification structure. CPS HR will present the draft report to the District’s Internal Project Manager and designated stakeholders.

Client Responsibilities and/or Pricing Assumptions Associated with Task:

- Costs assume one meeting, for up to two hours, with primary District Project Manager/HR staff to discuss the Draft Classification Report, including the Draft Classification Structure.
- As the District conducts its review of the Draft Report and Draft Structure, client comments and questions will be captured in a single document provided on the online shared drive.

Task 12 – Revise Classification Specifications. Once the District has approved the classification study findings, the classification specifications will be revised/created accordingly. The format for classification specification revisions will be submitted to the District for approval. Our methodology for this task will result in:

- Accurately identifying the specific essential duties and responsibilities; required knowledge, skills, and abilities; minimum education and experience requirements; and minimum special qualifications for each position in the study.

- Reviewing, revising, editing, and developing written classification specifications for each study classification that clearly specify and describe a general statement of duties; any distinguishing features of the class; essential duties, knowledge, skills, and abilities; acceptable minimum education and experience; and required special training and certifications.
- Describing the typical work environment for the classification.

CPS HR will provide the revised classification specifications to the District's Internal Project Manager for review and feedback. Upon finalization of the classification specifications, CPS HR will proceed with preparing the Final Classification Report and conduct the incumbent allocations process.

Client Responsibilities and/or Pricing Assumptions Associated with Task:

- Classification specifications will be uploaded to the shared online site. Documents will be marked "Draft" and provided in Microsoft Word with several views – "with mark-up" and "without mark-up." This will allow the District to easily view tracked changes. Edits and comments made by both parties will be captured in these online shared documents. CPS HR will post finalized versions of classification specifications in both Microsoft Word and Adobe PDF marked "Final."
- As the District conducts its review of the Draft Classification Specifications, client comments and questions will be captured in a single document (or in the Class Spec itself using the "Comments" or "Track Changes" functions) provided on the online shared drive.

Task 13 – Prepare, Submit, and Present Final Classification Report. CPS HR will prepare a final classification report upon receiving feedback from the District on the draft report and the revised classification specifications. The District will be responsible for approving and implementing classification specification content changes through their standard process, including any necessary notifications to employees, employee representatives, or the Department of Human Resources.

Client Responsibilities and/or Pricing Assumptions Associated with Task:

- Costs assume one virtual meeting (with the Project Manager in person), for up to two hours, with primary District stakeholders to present the Final Classification Report.

A sample Classification Report is provided under **Appendix B**.

Proposed Timeline

An example timeline follows, and the CPS HR Internal Project Manager and the District can discuss varying approaches to customize the timeline. CPS HR recommends a structured timeline that can be flexible to accommodate varying factors in achieving set milestones.

Our classification study timeline is based upon the assumption that (i) the District is able to enforce orientation, PDQ deadlines, as well as schedule interviews within the designated timeframe, and that (ii) the District will be able to review, comment on, and approve study products within agreed upon timeframes.

CPS HR is open to discussion regarding the commencement of the classification study in the interest of the District’s operational goals. The final timeline after that point is highly dependent on any dialog/meetings/time the District will need to review the data internally. **We understand that the District has requested a targeted completion date of September 22, 2021 (with commencement of services on June 23, 2021).** The “*” below shows the milestone to be completed by this September date.

| Example Classification Study Timeline From receipt of Notice to Proceed/Fully Executed Contract | Week Number(s) |
|--|----------------|
| Receive and Review Background Materials | 1 |
| Initial Project Meeting | 1 |
| Develop Job Evaluation Tool (PDQ) | 2 |
| Conduct Orientation Session | 3 |
| PDQ Completion | 4 |
| Supervisor Review and Approval of PDQs/Prepare for Job Evaluation Interviews | 5-6 |
| Conduct Job Evaluation Interviews | 7-8 |
| Classification/FLSA/Physical Requirements Analysis | 9 |
| Prepare, Submit, and Present Draft Classification Structure; Obtain Client Feedback | 10 |
| Update Classification Specifications | 11-12 |
| Client Review and Feedback Period | 13* |
| Prepare, Submit, and Present Draft Classification Report | 14-15 |
| Client Review and Feedback Period | 15 |
| Create and Present Final Classification Report | 16 |

Time Requirements

Project Management Approach

Availability and Resources

With 89 full-time employees as well as 200+ project consultants and technical experts nationwide, CPS HR delivers breakthrough solutions that help public sector organizations impact the communities they serve. CPS HR has worked with more than 1,200 government and public/non-profit clients throughout the United States and Canada. Our headquarters are located in Sacramento, California. We have regional offices in Southern California; Austin, TX; and Littleton, CO.

CPS HR is dedicated to the commitment of its full complement of resources for the success of all projects. The team members who will be working on this project will be readily accessible and are committed to meeting all deadlines and scheduled timeframes. The designated project team is available to integrate project assignments into their existing workload. We pledge our commitment to perform this work in an efficient and timely manner for any and all of the services we present in the Scope of Services section of this proposal. Additional project team members will be available to provide remote support based on their area of expertise relevant to the needs of the District.

Our Service Philosophy

Delivering on our promise to provide outstanding quality to our clients rests on our reliance of the following foundational principles that we follow every day:

- All materials are kept secure by using our secure Microsoft Teams site and internal shared drive.
- Keeping confidences regarding our client projects, nuances, political influences, etc., is required.
- Transparency and honesty are critical and frequently practices, even when difficult conversations are needed.
- We strive to understand your goals and collaborate with you to achieve them. Our approaches are customized to your needs.
- We will use your time efficiently and respectfully.

Our Communication Model

CPS HR Consulting recognizes that the success of any project depends upon the ability of the consulting team to develop and maintain effective working relationships with the District's Project Representative, management, employees, and other key stakeholders. Throughout the project, we envision collaborating with the District's Project Representative to maintain open lines of project communications and to develop a shared understanding of project needs, goals, and objectives.

CPS HR Consulting considers that open and consistent communication with project stakeholders is a key element of project acceptance and success. For that reason, the work plans presented by CPS HR Consulting contain multiple communication points with the District including:

- Initial project meetings
- Bi-weekly or weekly scheduled Project Meetings (Via e-mail or teleconference)
- Ad-hoc teleconference meetings with the District Project Representative, and other designated stakeholders, as requested
- On-site meetings to present project deliverables, if requested.

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

Cost Proposal

Professional Fixed Fee

CPS HR has prepared the following **professional fixed fee** based on the scope of work outlined.

| Study | Professional Fixed Fee |
|---|------------------------|
| Classification Study | \$41,333.75 |
| Not-To-Exceed Contract Amount: \$41,333.75 | |

Pricing Assumptions

| General Scope | |
|-------------------------------------|---|
| Number of Classifications | Up to 21 |
| Number of Incumbents | Up to 25 |
| Not Included in Expense Cap: | |
| Materials Production | CPS HR provides all documents electronically. Hard copy printing of documents for this engagement will be the responsibility of the District. |
| Consultant Expenses | Travel hours have not been budgeted for this scope as all work is expected to occur virtually. |

Itemized Breakdown of Tasks

| Labor Code | Hours | Cost |
|--|-------|------------|
| Project Preparation, Internal/External Client Kick Off Meetings, Timeline and Task Planning | | |
| Project Manager | 4.25 | \$595.00 |
| Principal Consultant/Technical Specialist | 9.75 | \$1,316.25 |
| Senior Consultant | 2.50 | \$300.00 |
| Senior Program Coordinator | 4.25 | \$510.00 |
| Administrative Technician | 4.50 | \$360.00 |
| Task Subtotal | 25.25 | \$3,081.25 |
| Incumbent Orientation, PDQ Development, FAQ Document | | |
| Project Manager | 0.00 | \$0.00 |
| Principal Consultant/Technical Specialist | 6.75 | \$911.25 |
| Senior Consultant | 2.50 | \$300.00 |
| Senior Program Coordinator | 3.00 | \$360.00 |
| Administrative Technician | 8.75 | \$700.00 |
| Task Subtotal | 21.00 | \$2,271.25 |
| PDQ Distribution and Inventory | | |
| Project Manager | 0.00 | \$0.00 |
| Principal Consultant/Technical Specialist | 2.00 | \$270.00 |

Proposal to the Truckee Tahoe Airport District
Classification Study (Part B)

| Labor Code | Hours | Cost |
|---|-------|------------|
| Senior Consultant | 0.00 | \$0.00 |
| Senior Program Coordinator | 1.00 | \$120.00 |
| Administrative Technician | 6.50 | \$520.00 |
| Task Subtotal | 9.50 | \$910.00 |
| PDQ Review/Selection of Incumbents/Interview Scheduling and Tracking | | |
| Project Manager | 0.00 | \$0.00 |
| Principal Consultant/Technical Specialist | 9.50 | \$1,282.50 |
| Senior Consultant | 23.00 | \$2,760.00 |
| Senior Program Coordinator | 1.00 | \$120.00 |
| Administrative Technician | 5.00 | \$400.00 |
| Task Subtotal | 38.50 | \$4,562.50 |
| Conduct Job Evaluation Interviews (Incumbents and Supervisors) | | |
| Project Manager | 0.00 | \$0.00 |
| Principal Consultant/Technical Specialist | 5.50 | \$742.50 |
| Senior Consultant | 29.00 | \$3,480.00 |
| Senior Program Coordinator | 1.00 | \$120.00 |
| Administrative Technician | 1.00 | \$80.00 |
| Task Subtotal | 36.50 | \$4,422.50 |
| Classification Structure Analysis | | |
| Project Manager | 0.00 | \$0.00 |
| Principal Consultant/Technical Specialist | 6.50 | \$877.50 |
| Senior Consultant | 6.50 | \$780.00 |
| Senior Program Coordinator | 0.00 | \$0.00 |
| Administrative Technician | 2.50 | \$200.00 |
| Task Subtotal | 15.50 | \$1,857.50 |
| Classification Structure Development and Class Spec Development | | |
| Project Manager | 8.00 | \$1,120.00 |
| Principal Consultant/Technical Specialist | 5.50 | \$742.50 |
| Senior Consultant | 23.00 | \$2,760.00 |
| Senior Program Coordinator | 1.00 | \$120.00 |
| Administrative Technician | 2.50 | \$200.00 |
| Task Subtotal | 40.00 | \$4,942.50 |
| Gather Client Feedback on Class Specs/Finalize and Auditing | | |
| Project Manager | 10.00 | \$1,400.00 |
| Principal Consultant/Technical Specialist | 4.00 | \$540.00 |
| Senior Consultant | 5.50 | \$660.00 |
| Senior Program Coordinator | 0.00 | \$0.00 |
| Administrative Technician | 8.50 | \$680.00 |
| Task Subtotal | 28.00 | \$3,280.00 |
| Allocate Staff to Classifications/Implement Client Feedback | | |
| Project Manager | 0.00 | \$0.00 |
| Principal Consultant/Technical Specialist | 4.75 | \$641.25 |

| Labor Code | Hours | Cost |
|---|-------|------------|
| Senior Consultant | 7.75 | \$930.00 |
| Senior Program Coordinator | 0.00 | \$0.00 |
| Administrative Technician | 2.00 | \$160.00 |
| Task Subtotal | 14.50 | \$1,731.25 |
| Reporting and Presentations | | |
| Project Manager | 7.00 | \$980.00 |
| Principal Consultant/Technical Specialist | 9.50 | \$1,282.50 |
| Senior Consultant | 13.00 | \$1,560.00 |
| Senior Program Coordinator | 4.00 | \$480.00 |
| Administrative Technician | 9.00 | \$720.00 |
| Task Subtotal | 42.50 | \$5,022.50 |
| Project Management, Quality Control, Status Reporting | | |
| Project Manager | 11.00 | \$1,540.00 |
| Principal Consultant/Technical Specialist | 3.50 | \$472.50 |
| Senior Consultant | 4.50 | \$540.00 |
| Senior Program Coordinator | 5.00 | \$600.00 |
| Administrative Technician | 4.50 | \$360.00 |
| Task Subtotal | 28.50 | \$3,512.50 |
| Miscellaneous Classification Items: FLSA, Physical Requirements Analyses | | |
| Project Manager | 0.00 | \$0.00 |
| Principal Consultant/Technical Specialist | 34.00 | \$4,590.00 |
| Senior Consultant | 10.00 | \$1,200.00 |
| Senior Program Coordinator | 0.00 | \$0.00 |
| Administrative Technician | 0.00 | \$0.00 |
| Task Subtotal | 44.00 | \$5,790.00 |

Billing Terms

CPS HR will bill in equal installments at the following milestones:

- After kick off meeting
- Provision of PDQ link to incumbents
- Completion of job evaluation interviews
- Submission of draft classification report
- Submission of final classification report

It is assumed that the District will be responsive to the delivery of all draft deliverables and all subsequent revisions as defined in the agreed upon project timeline. **Unanticipated revisions or delays to the project timeline could result in a need for an addendum to the contract related to contract end date, staff assignments, and/or pricing. Any addenda will be discussed in a timely manner with the District.**

Pricing Philosophy

CPS HR is flexible with the proposed work plan; alternate approaches may be discussed with the District which may in turn change the proposed cost of the project. As described in this proposal, the methods, approach, timelines, as well as the proposed fee, have been prepared as accurately as possible based upon the services requested and study objectives described in the information provided to CPS HR. The proposed professional fees reflect the steps and time necessary to conduct the study in a sound, thorough, and sustainable manner, including important input and review by the District's Internal Project Manager and designated stakeholders to accomplish the study objectives. If changes or additional services are required, we will be happy to discuss changes to the project activities, schedule, and/or fee proposal.

Hourly Rates for Additional Services

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

| Schedule of CPS HR Billing Rates | |
|--|-------------|
| Project Staffing Category | Hourly Rate |
| Project Manager | \$140 |
| Principal Consultant/Technical Specialist | \$135 |
| Senior Consultant/Senior Program Coordinator | \$120 |
| Administrative Technician | \$80 |

Signature Page

Our proposal shall be irrevocable for a period of sixty (60) days from the Proposal Opening Date.

| | |
|----------------------------|---|
| Organization Name: | CPS HR Consulting |
| Authorized Representative: | Vicki Quintero Brashear, Director of Products and Services |
| Signature: |  |
| Date: | 5/28/2021 |

Appendix A – Project Team Résumés

Michelle Garbato, M.A., SPHR, Project Manager

Employment History

- Principal Human Resources Consultant, CPS HR Consulting
- Human Resources Analyst III, Sanitation Districts of Los Angeles County
- Administrative Manager, County of Orange
- Program Manager, California Department of Human Resources
- Human Resources Manager, Beyond Carnism

Professional Experience

- Generalist and Specialist Human Resources experience with expertise in Recruitment & Selection and Classification & Compensation
- Current Project Manager for classification and compensation studies for public sector clients (state, local and special districts)
- Conduct position/classification analysis, working out of class, salary surveys, developing classification specifications and duty statements, etc.; complete statewide job analyses and exam development for a variety of classification levels and types
- Provide consultative services at state and local organizations; conduct audits, resulting in updates to CA Government Code Section 18661 (creating a Compliance Unit)
- Experience as Lead Trainer & Subject Matter Expert (e.g., job analysis, exam development, orientation and stakeholder sessions)
- Active committee member developing innovative statewide initiatives and policies

Education and Certifications

- M.A., Industrial/Organizational Psychology, California State University, Sacramento, CA
- B.S., Psychology, Rochester Institute of Technology, Rochester, NY
- Senior Professional in Human Resources (SPHR), Human Resources Certification Institute
- Certified Professional (IPMA-CP), International Public Management Association-Human Resources, in progress
- Labor Relations Academy Masters Certification (CLRM), California Public Employers Labor Relations Association, in progress
- Classification & Compensation, Recruitment & Selection, and Workforce & Succession Planning State Credentials, California Department of Human Resources

Sarah Jansen, B.B.A., Project Consultant

Employment History

- Senior HR Consultant, CPS HR Consulting
- Deputy Human Resources Director I/II; Human Resources Analyst I/II, County of Lake, Lakeport, CA
- Human Resources Assistant; Personnel Clerk (Student Trainee); Office Automation Clerk; US Forest Service, Eureka, CA

Professional Experience

- Advise County departments on the complex human resources matters, including but not limited to, leave of absence, employee performance, classification and compensation, etc.; advise departments on Human Resources related laws, policies, MOUs, etc. Oversee and manage the County's recruitment process
- Supervisory responsibilities, including hiring, training, work coordination, and evaluation
- Involved in numerous aspects of the County classification and compensation system, including advising departments, serving as the primary contact for job description development, performing and/or overseeing salary studies, making salary recommendations, etc.
- Serve as joint administrator for the County's HR information system, and primary system administrator for the County's online recruitment system
- Create, edit, and produce reports from the Human Resources and Payroll systems using specialized software (Cognos Impromptu)
- Oversee various mandated state and federal reports (i.e. EEO 4)
- Served as a member of the County's negotiating team for approximately one year
- Participate in benefits open enrollment for the County
- Responsible for the County's "position control" process - ensuring that only allocated, and funded positions are filled

Education

- Bachelors in Business Administration, Magna Cum Laude, Humboldt State University

Igor Shegolev, M.S., SPHR, Technical Specialist

Employment History

- Principal HR Consultant, CPS HR Consulting
- Owner, HR Know Consulting
- Faculty Instructor, University of Phoenix
- Senior Director of Compensation, Carondelet Health Network (Ascension Health)
- Manager of Compensation, Northwest Health System
- Compensation Analyst, Pima and Cochise County Government

Professional Experience

- Served as an independent consultant and expert advisor for various projects related to compensation, classifications, employment databases, record keeping, total rewards, executive compensation, policy development and benefits designs.
- Advised companies and government entities on retirement plan design, executive compensation, development of incentive and variable pay structures, classification structure, HRIS systems and databases. Lead team of independent contractors.
- Taught graduate and undergraduate courses in human resources management, economics, organizational behavior, business ethics and employment law.
- Directed development and implementation of compensation and benefits strategies, policies and practices of the Healthcare Network (three hospitals, surgery group and physician group (4,200 employees); oversaw compensation, benefits and HRIS strategies, policies and practices of the 650- bed nonprofit (3,500 employees) hospital.
- Participated in development of organizational strategy and strategic initiatives as a member of executive team.

Education and Certifications

- M.S., Troy University, Troy, AL
- Member, WorldAtWork
- Member, SHRM-GT
- Member, Arizona Total Rewards Association

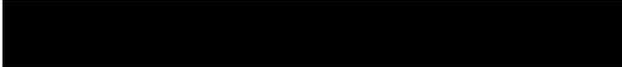
Appendix B – Sample Classification Report

We have included below part of a Sample Classification Report. The full report is available upon request.



Private and Confidential

Classification Study Final Report



September 27, 2017

SUBMITTED BY:
Jennifer Ramos, Principal Consultant
241 Lathrop Way
Sacramento, CA 95815
t: 916-471-3125 f: 916-561-8451
www.cpsr.us

Project Consultants:
Judy Wallace
Alfred Bingham

Support Staff:
Sarah Williams
Lynda Guerra



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I. Background

In 2017, ██████████ contracted with CPS HR Consulting (CPS HR) to conduct a classification and compensation study. The City originally contracted with CPS HR to conduct the compensation study first. As a result of feedback received from Directors and other factors, it was later determined that a sound compensation study could not be guaranteed without first completing a classification study to ensure that all classifications were current and reflective of employees' responsibilities. CPS HR was retained to evaluate the classification structure of 130 classifications within the organization.

At the time of the classification study, ██████████ 313 employees/positions allocated to various classifications. The primary objectives of the study were to:

- (1) review individual positions within each classification to determine if individuals were classified at the correct level and title for their job duties and responsibilities;
- (2) address any cases of working out-of-class and conduct further review;
- (3) identify and edit classification specifications that appear to be outdated, should include additional information, or contain irrelevant information; and
- (4) prepare new classification specifications as necessary.

The 2017 Classification Study Report is designed to provide an overview of study tasks, a conceptual framework for the analysis conducted, specific allocation findings and trends, recommendations for each of the positions encompassed in this study, and proposed next steps.

Once the classification portion of the study is complete, the following objectives of the study will be addressed: (5) review the salaries of comparable local agencies within the labor market to determine if salary adjustments might be warranted; and (6) review the internal salary equity within the ██████████
██████████ A separate compensation report will be provided to the City.

Final Classification Report

The classification study encompasses 313 positions, allocated to 130 classifications which are listed below:

| Existing Classification Structure at Onset of Study | | |
|---|---|--|
| ACCOUNTS PAYABLE TECHNICIAN | FIRE CAPTAIN | PUBLIC SAFETY OFFICER |
| ADMINISTRATIVE CLERK | FIRE CHIEF | PUBLIC WORKS DIRECTOR |
| ADMINISTRATIVE SECRETARY | FIRE LIEUTENANT | PUBLIC WORKS INSPECTOR |
| AIRPORT MANAGER | FIRE LIEUTENANT ADMIN (2080) | PURCHASING MANAGER |
| ANIMAL CONTROL OFFICER | FIRE MARSHAL | RECREATION ASSISTANT |
| ANIMAL CONTROL SUPERVISOR | FIRE PUMP ENGINEER | RECREATION SUPERINTENDENT |
| ASSISTANT CITY MANAGER | FIRE FIGHTER | SALES ASSOCIATE |
| ASSISTANT CITY SECRETARY | FLEET MANAGER | SENIOR ACCOUNTANT |
| ASSISTANT FIN DIRECTOR | GIS TECHNICIAN | SENIOR BUILDING INSPECTOR |
| ASSISTANT FIRE CHIEF | GIS FIELD TECHNICIAN | SENIOR CITIZEN CENTER DIRECTOR |
| ASSISTANT POLICE CHIEF | HEALTH INSPECTOR | SENIOR CODE ENFORCEMENT OFFICER |
| ASSISTANT UTILITY DIRECTOR | HEAVY EQUIPMENT OPERATOR | SENIOR HEAVY EQUIPMENT OPERATOR |
| BUDGET ANALYST | HORTICULTURIST | SENIOR MAINTENANCE TECHNICIAN |
| BUILDING AND DEVELOPMENT TECHNICIAN | HUMAN RESOURCES /CIVIL SERVICE DIRECTOR | SENIOR MAINTENANCE WORKER |
| BUILDING FACILITY LEAD | HUMAN RESOURCES COORDINATOR | SENIOR PAYROLL TECHNICIAN |
| BUILDING INSPECTOR II | INDUSTRIAL WASTE INSPECTOR | SENIOR PUBLIC WORKS INSPECTOR |
| BUILDING MAINTENANCE WORKER | MAINTENANCE TECHNICIAN | SENIOR TRUCK DRIVER/OPERATOR |
| CHIEF PUBLIC WORKS INSPECTOR | MAINTENANCE TECHNICIAN TRAINEE | SENIOR UTILITY PLANT OPERATOR |
| CITY COUNCIL | MAINTENANCE WORKER | SENIOR UTILITY PLANT OPERATOR (Sokoll WTP Operation) |
| CITY ENGINEER | MECHANIC II | SENIOR UTILITY WORKER |
| CITY MANAGER | METER MAINTENANCE SUPERVISOR | SENIOR UTILITY WORKER LINE LOCATOR |
| CITY MARSHAL | METER MAINTENANCE UTILITY WORKER | STREET SUPERINTENDENT |
| CITY SECRETARY | MUNICIPAL COURT CLERK | STREETS FIELD SUPERVISOR |
| CIVIC CENTER DIRECTOR | OPERATION ADMIN ASSISTANT | TEMPORARY PARKS MAINTENANCE WORKER |
| CODE ENFORCEMENT OFFICER | PARKS & RECREATION DIRECTOR | TOURISM EVENT MANAGER |
| COMMUNITY RELATIONS MANAGER | PARKS FIELD SUPERVISOR | TRANSFER STATION ATTENDANT |
| COMMUNITY SERVICES COORDINATOR | PARKS MAINTENANCE WORKER | TRUCK DRIVER/OPERATOR |
| CONVENTION/VISITOR'S BUREAU DIRECTOR | PLANNER | UTILITY BILLING CLERK |
| COURT SUPERVISOR | PLANNING DIRECTOR | UTILITY BILLING SUPERVISOR |
| CROSS CONNECTION CONTROL SPECIALIST | PLANNING TECHNICIAN | UTILITY DIRECTOR |
| DIRECTOR BUILDING & COMMUNITY SERVICES | PLANT MAINTENANCE SUPERINTENDENT | UTILITY WORKER |
| DISPATCH SUPERVISOR | POLICE CHIEF | WASTEWATER PLANT OPERATOR TRAINEE |
| DOWNTOWN DEVELOPMENT DIRECTOR | POLICE CORPORAL | WASTEWATER PLANT SUPERINTENDENT |
| ECONOMIC DEVELOPMENT COORDINATOR | POLICE DISPATCHER | WASTEWATER PLANT UTILITY OPERATOR |
| ECONOMIC DEVELOPMENT DIRECTOR | POLICE LIEUTENANT | WATER PLANT OPERATOR TRAINEE |
| EMERGENCY MANAGEMENT TECHNICIAN | POLICE PATROL OFFICER | WATER PLANT OPERATOR TRAINEE (Sokoll WTP Operation) |
| EQUIPMENT OPERATOR | POLICE SERGEANT | WATER PLANT SUPERINTENDENT |
| EQUIPMENT OPERATOR I | PROJECT LIAISON | WATER QUALITY TECHNICIAN |
| EVENT COORDINATOR | PT ADMINISTRATIVE CLERK | WATER UTILITY PLANT OPERATOR |
| EVENT SETUP CREW | PT ASSOCIATE JUDGE | WATER UTILITY PLANT OPERATOR (Sokoll WTP Operation) |
| FD BATTALION CHIEF | PT EVENT COORDINATOR | WATER/SEWER SUPERINTENDENT |
| FIELD SUPERVISOR | PT FOOD SUPERVISOR/ADMIN CLERK | WW COLLECTIONS FIELD SUPERVISOR I |
| FIELD SUPERVISOR I | PT MAINTENANCE TECHNICIAN | |
| FINANCE DIRECTOR | PT MUNICIPAL COURT JUDGE | |

II. Overview of Timeline/Status of Study Tasks

In conducting the classification study, CPS HR completed the following steps:

1. CPS HR Project Manager, Jennifer Ramos, submitted a proposal to the City for a classification study on April 12, 2017. The City had started a compensation study a couple of months prior in February 2017. However, both parties identified a need to conduct the classification study first based on feedback obtained in a Director survey and other factors.
2. During late April and early May, the Director of Human Resources/Civil Service, ██████████, and Jennifer Ramos held several strategy meetings and conference calls to shift from the compensation to classification study.
3. From May 14-17, 2017, CPS HR received and reviewed background documents provided by the City and listed below in order to formulate a project strategy.

- *Classification Specifications (electronic copies)*

Note: There were some employees with positions titles that did not match any official HR job descriptions, which delayed progress while an alternative approach to including those individuals could be developed.

- *Relevant Policies and Procedures*

- *Previous classification studies*

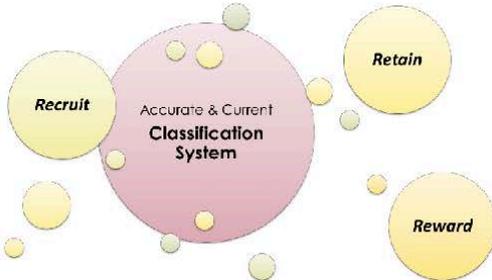
4. On May 16, 2017, CPS HR project consultants, Judy Wallace and Al Bingham, conducted a formal kickoff presentation with City management at the ██████████, to assure all were apprised of the study goals, processes, and objectives. Managers were given an opportunity to express any concerns or questions regarding the study.
5. On May 16, 2017, CPS HR conducted two additional employee orientation sessions to assure all employees were apprised of the study goals, processes, and objectives. Employees also had an opportunity to express any concerns or questions regarding the study.
6. On May 24, 2017, the City and CPS HR coordinated the distribution of a customized Position Description Questionnaire (PDQ) that was pre-populated with existing job description information to make the completion process easier and faster for employees.
7. CPS HR collected job related information from City employees from late May through June 2017. The PDQ summary section of report below provides more details about the three-tiered approach of collecting data from: 1) employees, 2) supervisors, and 3) department heads.
8. CPS HR conducted a detailed analysis of each position through the analysis of individual Position Description Questionnaires (PDQs) and relevant background materials from June through July 2017. CPS HR followed up with the City regarding pending or missing PDQs.

██████████
Final Classification Report

9. On July 12-14, 2017, CPS HR project consultants, Judy Wallace and Alfred Bingham, conducted job evaluation interviews with a representative sample of study incumbents to gain a comprehensive understanding of work performed. Interview schedules are included in the appendix of this report and include respective dates, locations, incumbent names, departments, and class titles.
10. In August 2017, CPS HR analyzed all of the information gathered via the PDQs and job evaluation interviews to identify the scope and level of work performed by each employee as well as the typical duties and the requisite knowledge, skills, abilities, and other job-related characteristics required to perform the work assigned to each position.
11. On August 28, 2017, the Director of Human Resources/Civil Service, ██████████, and Jennifer Ramos met to discuss CPS HR's analysis of Director and Manager classifications. During the call, CPS HR learned of recent changes to City administration. ██████████ shared the Director and Manager Analysis with the Interim City Manager for review and comment. CPS HR received an update on August 31, 2017.
12. CPS HR created and proposed a classification specification template for approval by the Director of Human Resources/Civil Service on September 8, 2017, prior to developing standardized and updated classification specifications.
13. CPS HR developed a Draft Classification Report for the City's review and comments. Allocation recommendations were based on information provided by employees during the PDQ collection, interviews, and follow-up research or data clarification with Human Resources. Submitted initial report via email on September 18, 2017.
14. Developed new classification specifications supporting the classification structure recommendations. The classification specifications include appropriate job definitions; distinguishing characteristics; supervision received and exercised; essential duties and responsibilities statements; knowledge, skills, and abilities statements; minimum qualifications; required training, certifications, or licenses; and physical and environmental working conditions.
15. CPS HR finalized allocation recommendations for each position to an appropriate classification.
16. CPS HR developed a Final Classification Report and submitted to the City on September 27, 2017.
17. CPS HR is scheduled to present Classification Study findings to City Council on October 2, 2017.

Conceptual Framework

An accurate and up-to-date classification system provides an organization with the necessary tools to make administrative, fiscal, and human resources decisions. Further, accurate and current classification specifications provide the fundamental and essential building blocks for successful administration of recruitment, performance management, compensation, and succession planning programs. In addition to providing the basis for human resources management and process decisions, position classification can also effectively support systems of administrative and fiscal control. Identifying positions based on a well-defined and orderly classification system supports organizational planning, operational efficiency and effectiveness, budget analysis and preparation, and various other administrative functions. The goal of this study is to provide the City with a classification structure that will allow it to effectively recruit, retain, and reward employees within the organization in a competitive and sustainable way.



Classification analysis, as applied to the positions in this study, relies upon sound principles of job evaluation. Using these principles, a classification structure should be designed to reflect distinct differences in the levels and types of work being performed based on established classification factors and concepts. This section of the report presents the conceptual framework for the methods used by CPS HR in reviewing an agency’s classification structure. To facilitate review, this section is organized as follows:

- General Guidelines and Definitions
- Nature of the Work
- Classification Job Family Levels

General Guidelines and Definitions

Standard Classification Factors

In order to develop classification/allocation recommendations, each position is first analyzed based on the nature of work performed. Nature of work refers to the occupation, profession, or subject matter field in which each position falls. Positions are initially grouped according to the broad occupational nature of their overall functions, responsibilities, similarities in their employment requirements and the purposes for which they exist. Positions that perform work of a similar nature are considered to be in the same “job family”. Common examples are clerical, technical, professional, supervisor, and manager job families discussed further in the Nature of Work section below. Within each job family, the level of the position is then determined by evaluating it against the following factors:

- **Decision Making** - This consists of (a) the decision-making responsibility and degree of independence or latitude that is inherent in the position, and (b) the impact of the decisions (i.e., within their department and/or agency wide).
- **Scope and Complexity** - This defines the breadth and difficulty of the assigned function or program responsibility inherent in the classification.
- **Contact with Others Required by the Job** - This measures (a) the types of contacts, and (b) the purpose of the contacts.
- **Supervision Received and Exercised** - This describes the level of supervision received from others and the nature of supervision provided to other workers. It relates to the independence of action inherent in a position and the types of classifications supervised (i.e., trade, clerical, technical, professional, sworn, etc.).
- **Knowledge, Skills, and Abilities** - This defines the knowledge, skills, and abilities necessary to successfully perform assigned job duties.

These factors were carefully and consistently applied during the analysis of each position included in the scope of the study. Not all factors will be as pertinent to all positions and each factor is analyzed in accordance with the importance of that particular factor to the kind of job under study.

Whole-Job Analysis

For purposes of this study, CPS HR used a whole-job analysis approach. This approach compares jobs with one another on the basis of an overall evaluation of difficulty or performance. The entire position, including the skills required, the decision-making authority, the scope, the magnitude of work, and the accountability for results, is compared as a whole to other positions. In addition, the overall scope of work (or whole job) is used to determine consistency in titling protocol across departments and allocation to appropriate levels by looking at the holistic impact agency wide.



In regards to the subsequent compensation study phase, it is important to note that job matching with labor market benchmark positions will also be based on the entire position. As an example, title changes alone do not necessarily change the scope of work, and should not exclusively impact pay considerations. This point is particularly relevant to the Director classifications in the City which are recommended for title changes as part of this study.

Broad and Narrow Classifications

Key to the City’s classification structure is the judicious use of broad and narrow classification concepts. It is easy to determine that several positions belong to the same class when the duties are identical. However, in practice, the duties and responsibilities of positions need not be identical in order to be placed in a common classification. Classification plans generally establish classifications based on a determination of “sufficient similarity.” However, within an individual organization, sufficient similarity can be interpreted to coincide with the goals and philosophy of the organization. For example, a broad interpretation recognizes positions that share a core set of classification factors, but accepts substantial variation between positions resulting in varied assignments within each broad classification. In contrast, a narrow interpretation might create separate narrow classifications to address such variations.

Point in Time Analysis

A classification study primarily captures the essential nature of positions at a single point in time. Therefore, recommendations cannot be based upon all possible future changes, particularly in a rapidly changing environment where organizational needs, technologies, and skill requirements are continuously evolving. Overall, the proposed classification structure, the levels of work, and the functional areas identified should provide a strong foundation for the City’s future classification needs.

Preponderance of Duties

Classification studies often find that positions are assigned a wide range of duties and that incumbents have various levels of responsibility at any one time. Therefore, the positions must be analyzed based on their preponderant duties. Preponderance is a measure of importance, and the most preponderant duties of a position are those that support the primary purpose of the position. Sometimes the most time-consuming duties of a position are preponderant; however, consideration must sometimes be given to the responsibility and complexity of certain duties that do not occupy the majority of the incumbent’s time. Overall, the determination of preponderance is a judgment call based on a consistent set of factors applied fairly and equitably across the classification structure.

Sufficient Similarity

Within an individual organization “sufficient similarity” can be broadly or narrowly interpreted. A broad interpretation recognizes positions that share a core set of classification factors, but accepts substantial variation between positions, resulting in broad classes. In contrast, a narrow interpretation might create separate narrow classes to address such variations.

Level of Work, Not Volume of Work

Position classification is a reflection of the level of work performed by an employee and is generally independent of volume. For example, if one employee processes double the work of another, yet the percentages of time spent on those tasks and other duties are comparable, a single classification should be appropriate for both positions. In fact, study questionnaires do not ask for, and the consultants do not consider, the relative productivity of employees when evaluating positions. Likewise, classifications are not distinguished by the amount of time spent by incumbents on tasks or the volume of work assigned to positions since problems of excessive workload are properly solved by redistributing work or adding employees, and not by creating new classifications.

Classification of the Position, Not the Employee

Position classifications should be consistent regardless of who holds the position. As such, a classification study should classify positions, not the incumbents to the positions. Furthermore, a classification system should not consider the capabilities of individual employees or the efficiency and effectiveness of an incumbent. The classification system should not measure of how well an incumbent performs in the position but, rather, it should assess the actual duties assigned to the employee. Thus, classification is not a tool to reward individual achievement, nor should classifications be created simply to reward length of service.

Position versus Classification

Position and classification are two words that are often thought of as interchangeable but, in fact, have very different meanings. In a classification plan, a position is assigned a group of duties and responsibilities performed by one person. Sometimes the word “job” is used in the place of position. In contrast, a classification may contain only one position, or may consist of a number of positions. When there are several positions assigned to one classification, it means that the same title is appropriate for each position because the scope, level, job duties, and responsibilities of each position assigned to the classification are sufficiently similar (but not necessarily identical); the same core knowledge, skills, abilities, and other requirements are appropriate for all positions; and the same salary range is equitable for all positions.

Classification versus Allocation

Classification is the process of identifying and describing the various kinds of work in an organization and grouping similar positions together based on job family, classification series, and classification distinctions. Allocation is more specifically tied to the placement and/or budgeting of positions within an organization. Thus, agencies may allocate a position within an organization based on the results of the classification analysis for that position.

Nature of the Work

The overall nature of the work being performed provides the basis for establishing job families and helps group positions according to their overall functions and responsibilities. Classifications in a job family usually have similarities in their employment requirements that may support career progression. However, classes in the same job family may still require different levels of education, experience, skill, effort, or responsibility. These categories are described as follows:

- **“Clerical/Administrative” classifications** are responsible for general office and/or secretarial support work such as document production/processing, filing, reception, calendar maintenance, scheduling, and data entry. Typically, incumbents use a basic knowledge of office procedures, combined with basic reading, writing and arithmetic skills.

An example in the City of a clerical/administrative classification series is the Administrative Clerk (existing class), Administrative Secretary (existing class) recommended to two levels of Administrative Secretary (no change) and Senior Administrative Secretary (new class). All three classifications require different levels of skill that support career progression within a job family.

- **“Technical” classifications** describe work that requires specialized skills, knowledge, and abilities typically acquired through practical experience. Positions at the technician level typically require incumbents to have, at a minimum, a high school diploma or GED equivalency, combined with college level courses or possession of technical certification.

Some examples of the City’s technical classifications are: Human Resources Technician (new class), Accounts Payable Technician (existing class), Senior Payroll Technician (existing class), Planning Technician (existing class), and Emergency Management Technician (existing class).

- **“Professional” classifications** typically describe work that is analytical in nature, requiring incumbents to possess sufficient knowledge and skill to analyze problems, evaluate and identify alternatives, and recommend/implement actions/solutions; such knowledge is usually obtained through possession of a four-year college degree and/or a highly specialized advanced type of training.

Some examples of professional classifications in the City are: GIS Analyst (new), Budget Analyst (existing), Senior Accountant (existing), and Planner (existing).

Lauren Tapia

To: Justin Chaudoin
Subject: RE: Proposal For Classification Study (Part B)

From: Justin Chaudoin <jchaudoin@cpshr.us>
Sent: Thursday, June 03, 2021 9:48 AM
To: Lauren Tapia <Lauren.Tapia@truckeetahoeairport.com>
Cc: Kevin Smith <Kevin.Smith@truckeetahoeairport.com>
Subject: RE: Proposal For Classification Study (Part B)

Good Morning Lauren,

Vicki was able to approve a 10% cost reduction from what is listed on the submitted proposals if selected to perform both studies. I hope this helps and we look forward to the opportunity to partner with you and the KTRK team!!

Thank You,

Justin T. Chaudoin, MBA, IPMA-SCP
Principal HR Consultant
Business Development

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