

**City of Portage**  
**Human Resources Committee Meeting**  
**Tuesday, October 11, 2016, 6:00 p.m.**  
**Municipal Building, Conference Room One**  
**Agenda**

Members: Rick Dodd, Chairperson, Dennis Nachreiner, Jeff Montfort, Martin Havlovic, Doug Klapper, Rita Maass

1. Roll call
2. Approval of minutes from the September 13, 2016 meeting.
3. Discussion and possible recommendation on Proposals Received for 2017 Classification and Compensation Study.
4. Adjourn to Closed Session per Chap. 19.85(1)(e) to Discuss proposed Side Letter of Agreement to 2016-2018 WPPA Collective Bargaining Unit Contract.
5. Return to Open Session
6. Discussion and possible recommendation on Proposed Side Letter of Agreement to 2016-2018 WPPA Collective Bargaining Unit Contract.
7. Discussion on Scheduling City Administrator's Performance Evaluation
8. Adjournment

The meeting location is handicap accessible. If you need reasonable accommodations due to a disability, please contact the City Clerk at 608-742-2176 no later than 48 hours prior to the meeting

**City of Portage**  
**Human Resources Committee Meeting**  
**Tuesday, September 13, 2016, 6:00 p.m.**  
**Municipal Building, Conference Room One**  
**Minutes**

**Members Present:** Rick Dodd, Chairperson, Marty Havlovic, Rita Maass, Jeff Monfort & Dennis Nachreiner.

Excused: Doug Klapper

**Also Present:** City Administrator Shawn Murphy, Administrative Assistant Angela Clemmons

**Media Present:** Bill Welsh, CATV & Craig Sauer, PDR

**1. Roll call**

The meeting was called to order at 6:07 pm by Mayor Dodd.

**2. Approval of minutes from the July 12, 2016 meeting.**

Motion by Maass, second by Monfort to approve minutes from the July 12, 2016 meeting. Motion carried 4–0 with Nachreiner abstaining.

**3. Discussion and possible recommendation on 2017 non-represented employees cost of living adjustment.**

Shawn Murphy distributed and reviewed his 9/8/16 memorandum summarizing his proposed cost of living adjustment for non-represented employees. In order to attract and retain quality employees Murphy recommended a 1.5% cost of living increase or Market Adjustment for non-represented compensation as of the 1<sup>st</sup> pay period in 2017. Nachreiner asked if it will affect the overall budget and Murphy stated it will fall within increase parameters. Monfort stated he was in favor of the 1.5% in order to stay competitive. Dodd said that he was in favor of 1% and not 1.5% due to additional opportunities for merit increases. Maass inquired whether there was enough in the budget to include the former Teamster employees. Murphy indicated this would apply to those employees as well. Nachreiner asked if most people are eligible for merit raises. Murphy replied that all non-represented employees are eligible, but the department head approves. Nachreiner then stated he supports a 1% increase. Maass asked if former Teamsters would be eligible for merit raises. Murphy said that annual evaluations will need to be completed in 2017 and their performance considered for merit adjustments in 2018.

Motion by Nachreiner to increase pay 1% for all non-represented employees, second by Havlovic. Motion carried 4 – 1 with Maass voting no.

**4. Convene to Closed Session per Chap. 19.85(1)(c), Wis. Stats. to review proposed classification of selected employees.**

Motion by Maass, 2<sup>nd</sup> by Nachreiner to convene to closed session pursuant to Wisconsin State Statutes 19.85(1)(c) to review proposed classification of selected employees. Motion carried unanimously on call of roll at 6:24 pm.

**5. Return to Open Session.**

Motion by Havlovic, 2<sup>nd</sup> by Maass to return to open session. Motion carried unanimously on call of the roll at 6:43 pm.

**6. Discussion and possible recommendation on proposed classifications of Teamster employees in 2017.**

Motion by Dodd to Council that Teamster employees be brought into non-represented pay ranges per Murphy’s proposal (shown below) with the condition that hire rate and all current wage levels not to be below current hourly rate as listed in the 2016 Teamster agreement, second by Nachreiner. Motion carried unanimously on call of roll.

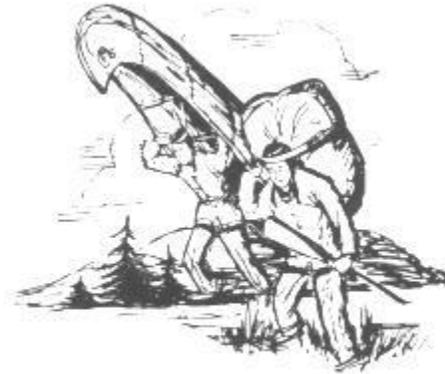
9/12/2016 Position	Number of Employees	Expiring Rate(2016)	Proposed 2017 Rate*	Proposed Classification
MS Crewperson	8	\$21.47 - \$22.41	\$21.47 - \$31.13	4
Mechanic	1	\$22.64 - \$23.68	\$21.47 - \$31.13	4
Asst Mechanic	1	\$22.12 - \$23.05	\$21.47 - \$31.13	4
Building & Grounds	1	\$17.46 - \$17.97	\$17.79 - \$26.20	3
City Hall Custodian	1	\$21.47 - \$22.41	\$17.79 - \$26.20	3
Sewer Operator	3	\$23.07 - \$24.07	\$21.47 - \$31.13	4
Water Operator	3	\$23.07 - \$24.07	\$21.47 - \$31.13	4
*Hire rate not less than rate in expired 2016 Teamster Contract, plus COLA				

**7. Adjournment**

Motion by Nachreiner, second by Maass to adjourn the meeting at 6:47 pm. Motion carried unanimously.

Submitted by Angela Clemmons, Administrative Assistant

Date Approved: \_\_\_\_\_



*"Where the North Begins"*

**REQUEST FOR PROPOSALS**

**City of Portage, WI**  
*Compensation/Classification Study*  
*For*  
*Selected Personnel*

*Release Date: August 23, 2016*  
***Due: September 9, 2016***

Submit Sealed Proposals to:  
Marie A. Moe, City Clerk  
City of Portage  
115 W. Pleasant Street  
Portage, WI 53901  
[Marie.Moe@portagewi.gov](mailto:Marie.Moe@portagewi.gov)  
Phone: 608-742-2176  
Fax: 608-742-8623

# REQUEST FOR PROPOSAL

## Compensation & Classification Study – Selected Employees

### I. INTRODUCTION/PURPOSE

The City of Portage, WI (City) is seeking proposals from qualified consultants to conduct a partial compensation and classification study of selected non-represented full-time employees for the City for the purpose of delivering a report to the Common Council in 2017. The purpose of the study is to evaluate the City's present salary and benefit structure as compared to the job market for comparable positions in the private and public sectors. This Request for Proposals will assist the City in determining which consultant or firm can offer the highest quality service at the most cost effective means. The selected consultant's remuneration will be included in the 2017 City Budget. Interested firms may submit a proposal to Marie A. Moe, City Clerk **no later than 2:00 PM on Friday, September 9, 2016**. Proposals shall be submitted in sealed packages labeled "RFP – Compensation Study".

### II. SCOPE OF SERVICES

The City is interested in obtaining the services of one or more qualified individuals or companies to provide the evaluation however, the City reserves the right accept any proposal that is in the best interest of the City or reject any or all proposals or to retain services from other individuals or companies for related projects/services at any time.

Project completion is negotiable; however a final report for review is expected no later than April 30, 2017.

Specifically, the selected consultant or firm shall provide the following:

1. Review current job classifications and position descriptions, evaluate and validate for knowledge, skills, abilities, essential functions, education/experience, supervision received and any licensing/certification requirements for positions in Administration, Clerical, Engineering, Public Safety and Public Works(custodial, parks, streets and utilities) areas.
2. Conduct interviews with employees and supervisors as needed.
3. Identify appropriate benchmarking standards and conduct salary/wage surveys as needed for similar position with comparable municipalities and businesses.
4. Evaluate and comment on the quality, cost and level of City's employee benefits.
5. Conduct overall review of total compensation system, identify potential pay compression and inequities internally and externally and provide recommendations to address. Also evaluate administration of current system

and provide recommendations for improvement.

6. Employees currently in Teamsters Local No. 695 did not recertify as of 1/1/2017. Evaluate proposed classifications for affected positions and validate or recommend changes.

### **III. COMMUNITY & DEPARTMENT PROFILE SUBJECT TO STUDY**

Portage, Wisconsin (established 1854) is the County seat for Columbia County with an estimated population of 10,238 (2015). The City covers approximately 10 square miles and has 86 FTE employees, 47 of which shall be included in this study. The City is a municipal corporation managed under the Council/City Administrator form of government. The appointed City Administrator oversees the operations of 9 departments. Due in large part to the economic downturn of 2008, the City experienced a significant decline in property values that has only recently began to rebound. Annual budgets (and therefore staffing levels and compensation) have remained stagnant. It was felt that an evaluation of the level of compensation for selected positions was warranted to insure the City attracts and retains high quality employees.

The following functional areas are subject to this study:

**A. Administration (8 positions):** Located in the Municipal Building, City Administration is comprised of 7.15 full-time employees, including the City Administrator, City Clerk, Finance Director, Deputy Clerk, Deputy Treasurer (also serves as Public Works Secretary), Administrative Assistant, Business Development/Planning Director-located at 1800 Kutzke Rd (Enterprise Center) and Court Clerk. Administrative Services comprises the collective management and support activities for the City.

**B. Fire (2 positions):** Located in the Municipal Building, the Fire Department has 2 full-time non-represented staff: Fire Chief and Secretary (80%-shared with Administration). The Department has 5 full-time, represented employees and authorization for up to 40 paid, on-call fire fighters which are not subject to this evaluation.

**C. Parks & Recreation (5 positions):** The Parks & Recreation (P&R) Department is located in 2 separate locations with full-time Manager and full-time Secretary located at 806 Silver Lake Drive. 2 full-time maintenance crewpersons and 1 Park Foreman located in the Maintenance Garage on Fair Blvd are members of the collective bargaining agreement expiring 12/31/2016. The P&R Dept employs a variety of seasonal employees which will be not subject to this study.

**D. Police (8 positions):** Located in the Municipal Building, the Police Dept consists of the following full-time non-represented personnel: Chief, Detective Lieutenant, Administrative Lieutenant, Patrol Lieutenant, 2 Community Service Officers and 2 Confidential Secretaries. The Department has 19 full-time represented personnel which are not part of this study.

**E. Public Works/Engineering (14 positions):** The Public Works Department is located in a garage facility at 616 Washington Street and consists of the following full-time personnel that are subject to the Teamsters Local No 695 agreement expiring 12/31/16: 1 Public Works Forman, 6 Crewpersons and 2 Mechanics, all of whom are supervised by 1 Public Works Superintendent (non-represented). There are also 2 custodial staff(represented) that maintain 4 buildings. The City Engineer/Public Works Director and an Engineering Technician are located in the Municipal Building.

**F. Utilities (10 positions):** The wastewater and water utilities have a total of 10 employees operating out of 3 separate locations. The Wastewater (Sewer) utility has 4 full-time staff stationed at the treatment facility, located at 1600 E Wisconsin St consisting of 3 operators(represented through 12/31/16) and one Superintendent. The Water utility has 3 operators(represented through 12/31/16) operating out of a maintenance facility at 701 W. Slifer Street under supervision of one Superintendent and 1.75 non-represented Account/Billing Clerks located at the Utility office, 135 Northridge Drive. Additionally, the Water Utility Superintendent (non-represented) has an office at 135 Northridge Drive.

#### **IV. MINIMUM RFP SUBMITTAL REQUIREMENTS**

The proposing firm must not be affiliated with any software company that sells, develops, advises or implements specific software projects. The firm must be independent and unbiased. Proposals shall be valid through October 31, 2016.

Six (6) copies of the complete proposal (no more than 10 pages in length) are required and shall include:

1. Name, address and brief description of the business entity. This may include a brochure about the firm.
2. Qualifications to undertake the City's needs. If the firm intends to use other firms for specialized services associated with the list of services described in this RFP, the qualifications must include information on the other firms to be used.
3. A list of similar projects completed by the firm that demonstrates the firm's capabilities working with other municipalities. The list should include the name, address, and telephone number for each client.
4. Profiles of key personnel to be involved in the design of this project.
5. Statement of current workload and demonstration that the firm is capable of taking on additional work.
6. A schedule of fees keyed to each component of the scope of services. The fees for this project shall be lump sum for each component of the project. Include hourly rate schedule for all personnel who will work on this project. Note that the City may conclude the project at the end of any phase.
7. A one page Executive Summary and any additional information that is believed to be useful in the evaluation of the firm's qualifications.

**V. SELECTION PROCESS**

Proposals will be evaluated and the firms judged by designated City officials to be most appropriately qualified may be interviewed. The selection will be based on qualifications, experience, and fees. Cost is one of several evaluation criteria; the City may choose not to select the proposal with the lowest cost. The project is solely funded by the City of Portage. No reimbursement will be made for costs incurred during preparation/presentation of the proposal.

**Qualifications Evaluation**

Selection criteria will be the based upon the following: (10 BEING THE HIGHEST)

	Item	Rating	Weight %	Total
1)	Firm's history and resource capability to perform required services.	X	20%	=
2)	Related Firm experience.	X	10%	=
3)	Qualifications of staff and consultants.	X	10%	=
4)	Quality and content of references included.	X	10%	=
5)	How creative was this submittal? Was it prepared specifically for our purpose?	X	15%	=
6)	Completeness and professionalism of information submitted.	X	10%	=
7)	Fees for services and any reimbursable.	X	25%	=
	Total Score		100%	

The City of Portage reserves the right to accept or reject any or all proposals or select the proposal that it deems to be in the best interests of the City.

**Tentative Selection Process Schedule**

Proposals Due: **Friday, September 9, 2016 at 2:00 PM**

Interviews: TBD

Firm Selection: September 22, 2017

## **VI. AMENDMENTS, ADDENDA OR QUESTIONS**

The City of Portage reserves the right to modify or issue amendments to this RFP. If questions result in the modification of this RFP, the written modifications will be distributed to known proposers, or anyone who has indicated an interest in writing a proposal.

Questions of this RFP should be directed to: Shawn Murphy, City Administrator, (608) 742-2176, Ext 324 or email at [shawn.murphy@portagewi.gov](mailto:shawn.murphy@portagewi.gov). All questions, requests for interpretations or corrections of this RFP must be received by August 31, 2016. Proposers interested in receiving any proposal addenda shall provide an email address to the City Administrator by no later than August 29, 2016.

## **VII. INSURANCE REQUIREMENTS**

Consultants who are awarded a contract shall be expected to provide proof of insurance coverage naming the City of Portage as additional insured. Proof of insurance shall include liability coverage - Occurrence Form in the following limits:

~Vehicle Liability (owned/un-owned & hired vehicles) Bodily Injury & Property Damage:	\$1,000,000
~Personal & Advertising Injury	\$1,000,000
~Professional Liability (E & O)	\$1,000,000

## **VIII. WITHDRAWAL OF PROPOSALS**

Proposals may be withdrawn by the proposer provided a written request is received by the City Clerk before the proposal opening date and time has passed. Any proposal withdrawn will be returned, unopened, to the proposer after the opening process has been completed.



**CONSULTING PROPOSAL**  
**TO**  
**CITY OF PORTAGE**  
**FOR**  
**CLASSIFICATION AND**  
**COMPENSATION STUDY**

**SEPTEMBER 9, 2016**

**Contact:**

**Patrick W. Glynn**  
**Carlson Dettmann Consulting, LLC**  
**6733 Frank Lloyd Wright Avenue**  
**Middleton WI 53562**  
**920.418.2140**  
**patrick.glynn@carlsondettmann.com**

## I. EXECUTIVE SUMMARY

The City of Portage (City) requested a proposal to conduct a classification and compensation study and analysis covering an estimated 47 job classifications. The City's RFP contained a detailed scope of services, which we are prepared to address and/or provide in the course of the project.

Carlson Dettmann Consulting, LLC is a Wisconsin-based firm with extensive experience in public, private, and not-for-profit organizations. The founding partners, Charlie Carlson and Scott Dettmann, combined have over 75 years of consulting and executive experience.

In summary, the steps to complete a consulting study of the job classification systems for the City would be as follows:

- Project Definition and Orientation
  - refinement of the project plan to meet the specific needs of the City
- Position Analysis & Data Collection
  - formal process we use to gather and assess information about the duties, responsibilities and requirements of each position
- Job Evaluation
  - provide an objective means of ranking each position in an organization, independent of individual performance, into a hierarchy
- Market Analysis
  - collect and analyze relevant labor market information for the City to determine competitiveness of base salaries
- Total Compensation Analysis
  - summary review of the City's total compensation program, including development of cost estimates for the major benefit categories
- Pay Plan Design
  - design an appropriate salary structure and draft all of the necessary supporting policies
- Public Presentations
  - detailed presentation discussion of our findings and recommendations
- Employee Appeals (optional)
  - develop an appeal procedure so that a staff member can request a review of the job evaluation and position classification outcome of this study

## II. CONTENT OF PROPOSAL

This study will cover up to 47 of the City's current job classifications. It is the City's desire to develop and manage a unified pay structure for these employees to ensure that the City is able to attract and retain talent. It is our expectation that the City will want to adopt a uniform pay plan for all covered staff that is based on modern compensation principles and practices. The steps proposed for us to complete a consulting study of the job classification systems for the City would be as follows:

### Phase One: Project Definition and Orientation

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

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

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

At the outset of the study, and throughout the process, we would ask the City's decision-makers to provide guidance on four key policy questions:

1. What markets does the City wish to use for which job classifications?
2. Where does the City prefer to position its pay plan(s) in those markets?
3. How does the City want to deliver future pay changes? Based on performance, length of service, changes in living costs, or some combination of two or more of these factors?
4. What role, if any, does the level of employee benefits play into the compensation decisions to be made by the City?

We would lead a discussion on potential answers to these questions, offer our experience and suggestions, and develop the pros and cons of the various alternatives.

### Phase Two: Position Analysis & Data Collection

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

It is our experience that the best way to obtain accurate information is to have employees describe their own jobs in a systematic, complete manner because the person performing the job is the single best source of information about the job. In lieu of employees providing this information, we can work from other forms of job documentation (e.g. job descriptions) provided it is current and complete. The insights and opinions of the supervisor and/or manager are also important to consider.

The position analysis can take four forms: (1) review of the up-to-date job descriptions; (2) completion of our Job Description Questionnaire (JDQ); (3) employee interviews; or (4) a combination of these methods. Assuming the job descriptions are indeed up-to-date, we are comfortable utilizing the City's documentation; however, these may need to be supplemented with additional information depending on the circumstances.

If it is determined that JDQ's are a preferred route, we would require that the City designate one employee per classification to complete a JDQ for that classification. For jobs with multiple incumbents, we propose that the City's designee coordinate a joint JDQ, provided the duties among the incumbents are fundamentally the same. A copy of our JDQ is attached.

While we typically feel that employee interviews are unnecessary and costly, we can offer this service if the client so desires. However, please note that we would interview every department head as part of our base fee for this project.

In order to provide the City with the required analyses as it relates to this project, we require a significant amount of data from the City. It is imperative that the data be complete and accurate to ensure that our analysis is also complete and accurate. The data fields required for the wage analysis include the following individual data for the employees subject to the study:

- First Name, Last Name, Job Title, Department, Current Rate of Pay, Current FLSA Status, FTE, Annual Work Year, Gender, Current Grade, Current Minimum, Current Market Rate / Midpoint, Current Maximum, Hire Date, Job Date, Birth Date

The benefits analysis will require end-of-year aggregate data for the following data elements:

- Wages & Salaries Paid, Paid Leave (Vacation, Sick, Holiday, Sick, Personal), Supplemental Pay (Overtime & Premiums, Comp Time Paid, Shift Differentials, Bonuses), Insurance (Life, Health, Medical, Dental Vision, STD, LTD), Retirement (Defined Benefit, Defined Contribution), and Legally Required Benefits (Social Security, Medicare, Unemployment Paid, Worker's Compensation)

Additionally, other sources of information that are relevant to our analysis will be requested during the course of the project. They include, but are not limited to, the following:

- Organizational charts / tables of organization
- Current policies or contracts (if still applicable)
- Current wage schedules
- Budget/revenue forecasts
- Prior year costs of employee compensation
- Past, present & projected future health insurance data
- Other benefit costs tied to payroll
- Special pay issues (e.g. on call pay; out of class pay; overtime rules; FLSA issues)
- Overtime data related to potential wage compression
- Current performance evaluation documentation

### Phase Three: Job Evaluation

The purpose of job evaluation is to provide an objective means of ranking each position in an organization, independent of individual performance, into a hierarchy (i.e. "a relative ranking of positions"). Our job evaluation methodology is based upon determination of discernible differences in job content. Our system measures job content at objective levels in the following dimensions (otherwise known as "compensable factors"):

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

Each of these factors is broken down into sub-factors with point levels associated with measured levels on each factor. We have used the system in thousands of applications, in both the public and private sectors, and it consistently yields valid results. It has been our experience that these factors of internal job worth are consistent with values found in our client organizations. Because of their breadth, they cover all main aspects of a job and are also seen as relevant to employees at all levels in the organization. We would apply the job evaluation system to all of the documented job content. A summary explanation of the system is attached.

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

Phase Four: Market Analysis

We would collect and analyze relevant labor market information for the City to determine competitiveness of base salaries. As indicated above, the City would have significant input into the selection of markets to be surveyed. We would utilize excellent published data sources, as well as custom survey data as needed, and we maintain an extensive survey library for this purpose. Our current survey database includes data for over 190 Wisconsin counties, cities, towns and villages.

In addition, we have contracted with MarketPay ([www.marketpay.com](http://www.marketpay.com)), an online data warehouse that is loaded with our private sector survey library, as well our own custom survey. Further, if it is found that one of the selected comparables is not in our database, or if the data is no longer current, we will collect that information as part of this project. We believe that there is sufficient published salary survey information for private sector comparisons in the City's labor market for many similar positions.

Phase Five: Total Compensation Analysis and Benefits Review

We approach human resource consulting from a total compensation perspective. As part of this phase of the project, we would conduct a summary review of the City's total compensation program, including development of cost estimates for the major benefit categories: required benefits (social security, Medicare, unemployment and worker's compensation), paid time off, retirement, and medical coverage. All of our research and practical experience indicates that most public employees have benefit programs involving employer cost contributions that are often, but not always, superior to area private sector employers.

It is impossible to obtain accurate local survey measures of benefits costs from private sector employers; however, we can develop reliable anecdotal information to guide the City's decision-makers. We have found that the Kaiser Family Foundation and the Bureau of Labor Statistics provide excellent insights into employer costs from not only a national perspective, but also from a regional level. Using the data collected by these sources, and applying a similar methodology to the local data, we are able to give our clients a starting point from which they can begin their own assessment of their total compensation package. We also can develop reliable estimates of the dollar value of the City programs in determining future hiring salaries.

Phase Six: Pay Plan Design

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

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

Phase Seven: Public Presentations

We advocate transparency in our consultations, so the City can expect an articulate, detailed discussion of our findings and recommendations. We not only encourage our clients to emphasize communication with employees at all steps of the process, but we would anticipate distinct conversations/presentations with the City leadership (e.g. leadership, committee, etc.) as it relates to market selection and placement, mid-project findings and update, review of policy questions, and a final report and presentation(s).

At Carlson Dettmann Consulting, we are proud of our record of adoption and system continuation. We develop and present solutions that are sound, understood, and stand the test of time. We believe this is largely due to the fact that we actively engage our clients in the decision-making process.

#### Phase Eight: Employee Appeals (Optional)

If the City opts to include an appeals process, we would develop an appeal procedure so that a staff member can request a review of the job evaluation and position classification outcome of this study. An appeal process can be useful in the acceptance of the process by the employees. However, if selected, an appeal of the job evaluation result refers to an objection to the pay grade in which the position has been placed and not to the policy decisions made by the City (e.g. pay structure, market comparisons, pay plan implementation strategy, etc.). We believe the standard for an appeal should be that the job has changed substantially during the study so that it could not have been evaluated accurately or there has been a gross error.

We would conduct this appeal process after study recommendations are adopted by the City. The reason why we recommend handling the appeal process in this way is there is nothing to appeal until the recommendations are adopted. The appeal process is keyed toward individual cases, not the system itself.

We have found—for those clients that allow appeals—that this approach keeps the appeals process manageable.

#### **IV. CONSULTING TEAM**

Carlson Dettmann Consulting, LLC is a Wisconsin-based firm with extensive experience in public, private, and not-for-profit organizations. Carlson and Dettmann combined have over 75 years of consulting and executive experience. The Carlson Dettmann team has completed projects in over 15 states, including Wisconsin, Virginia, Ohio, Illinois, Arizona, California and Washington.

Our primary focus is on total compensation as a critical component of the overall human resource strategy. We strive to match each organization's compensation program to its strategic objectives. A well-designed total compensation program that is communicated effectively increases the probability that your employees will understand how their work relates to achieving your organization's strategic goals.

For purposes of this project, Patrick Glynn would be the Project Director and will serve as the primary working contact for the City. Jennifer Hassrick will serve as backup to the project, and assist in various capacities. A summary of their backgrounds is as follows:

- Patrick Glynn – Senior Consultant with CDC since 2013, and nearly two decades experience at the management level in local government with service to Calumet, Sauk, and Marquette Counties. Patrick is the former president of the Wisconsin Public Employer Labor Relations Association, and currently serves on the board of directors of the National Public Employer Labor Relations Association. Patrick has a bachelor's degree from the University of Wisconsin-Stevens Point. Patrick has served as project manager on numerous CDC projects for city, county, and special district/utility clients.
- Jennifer Hassrick – Consultant with CDC and Operations Manager since 2015, and more than ten years of business ownership and management experience. Developed the CDC survey database warehouse and serves as Operations Manager for the firm. She has a bachelor's degree from the University of Wisconsin – Madison and a master's degree from Northern Illinois University.

We are experts in survey design and analysis. In the mid-1990's, our predecessor firms, Carlson Dettmann Associates and Survey Research Associates (subsequently re-named **enetricx**) pioneered online salary surveys and designed and managed the statewide survey sponsored by Wisconsin public employers. Charlie Carlson was CEO of both firms.

We sold the entire **enetricx** firm to Gallup, Inc. in 2008, and the partners supported Gallup's transition of the survey and technology sides of our business for two years. In 2010, Carlson and Dettmann re-acquired their human resource consulting practices and re-established Carlson Dettmann Consulting, LLC.

#### **V. PROFESSIONAL REFERENCES**

We tailor the compensation plans that we develop to the specific requirements, culture, and capacity of each client. While a complete list of our post-Act 10 Wisconsin public sector projects is attached to this proposal, we have

provided information relating to five (5) projects that we believe provide a sampling of similar work we have recently completed. The City is welcome to contact anyone on this list.

<b>Client Name</b>	<b>Description</b>	<b>Contact Info</b>
Calumet County	Uniform pay plan covering all employees (except sworn represented) adopted. Plan is step system with commitment to convert to pay-for-performance.	Todd Romensko 920.849.1448
City of Merrill	Uniform pay plan. Plan is step system to the range maximums.	David Johnson 715.536.5504
City of Watertown	Uniform pay plan covering all employees (except sworn represented). Plan is a step system, with the intent to move to a combination step system to control point with pay-for-performance to range maximum.	Ron Krueger 920.262.4000
Columbia County	Uniform pay plan. Plan is step system to the range maximums.	Joc Ruf 608.742.9667
City of Fitchburg	Uniform pay plan covering all employees (except sworn represented). Plan is combination step system to control point with pay-for-performance to range maximum.	Lisa Sigurslid 608.270.4211

## VI. PROJECT TIMETABLE

We would complete these tasks by implementing the following detailed work plan, subject to the scheduling and availability of the client. The following timetable is suggested for this project:

<b>Task</b>	<b>Anticipated Completion</b>
Initial Meeting with Leadership / Senior Management .....	Week 1
Project Orientation/Initial On-Site Meeting .....	Week 2
Job Analysis / Review (Possible JDQ's).....	Week 6
Market Survey and Analysis .....	Week 10
Job Evaluations .....	Week 12
Review of Results & Fringe Benefit Discussions.....	Week 14
Draft Report .....	Week 16
Review/Discussions with Leadership .....	Week 17
Presentation of Final Report.....	Week 18
Appeals Process.....	Following adoption (if selected)

## VII. PROFESSIONAL FEES

The unit of work by which Carlson Dettmann Consulting prices and conducts its projects are the job(s) to be analyzed as opposed to the hours required to do the work in the project. As such, the total professional fee to CDC for this project would be \$16,500 plus mileage expenses. This fee would include employee project orientations, meetings with the City's staff, on-site management interviews and up to three meetings with the appropriate parties (e.g. leadership, board, committee, etc.) to ensure adoption.

The project fee would be paid in four (4) equal installments of \$4,125: initial payment due upon execution of a professional services agreement, second payment due at the start of the second month of the project, third payment

due at the start of the third month of the project, and the final payment due upon delivery of CDC's findings and recommendations to the City. Expenses would be invoiced monthly during the project.

Our proposal is based upon 47 job classifications identified by the City. However, our experience has been that this count may eventually move up during the course of a project. Accordingly, we propose adjusting the fee appropriately with the City invoiced \$250 for every job evaluation over the 47-job evaluation count.

While we believe job documentation, supplemented with management interviews, is sufficient to complete our work, we also understand that there are times when the City might decide to have employees interviewed. We would conduct employee interviews, as determined by the City, at our hourly rates. Again, department head interviews are included as part of the proposed fee.

Many of our projects include an appeals/review process following adoption of a new plan. Because the approach to appeals varies from client-to-client, we have found it easiest to include this as an optional add-on to a project. If the City desires to incorporate an appeals process, the City will be invoiced \$175 per appeal/review submitted for our review and recommendation, plus travel expenses.

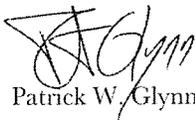
Any additional work may be requested and agreed upon and would be invoiced at either our standard hourly rates of \$225, or for an additional project fee as mutually agreed upon by the City and CDC.

## VII. STATEMENT OF CURRENT WORKLOAD

It is not uncommon for Carlson Dettmann Consulting to be actively involved in several projects at one time, which is also demonstrated by our current workload. However, it is our practice to only submit proposals for those projects which can reasonably be completed by our staff, and in the timeframes defined by our clients. The City's timeline of April 30, 2017, fits into our current workload projections.

This proposal is valid until October 31, 2016. Thank you for the opportunity to submit this proposal, and we hope to have the opportunity to serve the City of Portage on this project and thereafter.

Respectfully submitted on September 8, 2016,



Patrick W. Glynn, Senior Consultant

### Attachments:

- List of Recent Client Projects

**Representative List of Recent Public Sector Projects**

County Governments		
Barron County	Adopted a combination step system to control point with pay-for-performance to range maximum. Appeals currently in process.	Rachael Richie 715.537.6825
Bayfield County	Uniform pay plan covering all employees. Plan is step system to the range maximums.	Mark Abeles-Alison 715.373.6181
Calumet County	Uniform pay plan covering all employees (except sworn represented) adopted. Plan is step system with commitment to convert to pay-for-performance. County is an ongoing Total Rewards Management System (TRMS) client. [Market Update completed in 2015.]	Michelle Wright 920.849.1611
Columbia County	Uniform pay plan. Plan is step system to the range maximums.	Joe Ruf 608.742.9667
Dodge County	Uniform pay plan covering all employees (except sworn represented) adopted. Plan is combination step system to control point with pay-for-performance to range maximum. Assisted County in implementing new performance management system.	Sarah Eske 920.386.3692
Door County [In Process]	Phase 1: Market re-pricing of an existing plan to test competitiveness. Phase 2: Job evaluation of all positions and placement on the wage schedule.	Kelly Hendee 920.746.2306
Douglas County	Uniform pay plan covering all employees (except sworn represented). Plan is combination step system to control point with pay-for-performance to range maximum.	Linda Corbin 715.395.1464
Iowa County	Committee recommendation for a combination step system to control point with pay-for-performance to range maximum.	Allison Leitzinger 608.935.0374
Jefferson County	Uniform pay plan covering all employees. Plan is step system to the range maximums.	Terri Palm 920.674.7103
Jo Daviess County, IL	Uniform pay plan covering all employees. Plan is combination step system to control point with pay-for-performance to range maximum	Dan Reimer 815.777.6557
Lincoln County	Uniform pay plan covering all employees.	Randy Scholz 715.539.2501
Oconto County [Market Update in Progress]	Uniform pay plan. Plan is step system to the range maximums.	Kevin Hamann 920.834.6811
Oneida County	Uniform pay plan covering all employees (except sworn represented). Plan is combination step system to control point with pay-for-performance to range maximum for exempt employees and a step system for nonexempt employees.	Lisa Charbarneau 715.369.6154
Price County [In Process]	Comprehensive compensation study covering all non-represented County staff.	Nick Trimner 715.339.5138
Sawyer County [Market Update in Progress]	Both a compensation plan and employee policy project. Uniform pay plan adopted. Plan is step system to the range maximums.	Tom Hoff 715.638-3245
Shawano County	Uniform pay plan adopted. Plan is step system to the range maximums.	Judy Rank 715.526.4640
Taylor County	Uniform pay plan covering all employees (except sworn represented). Plan is step system.	Marie Koerner 715.748.1403
Waupaca County	Uniform pay plan covering all employees (except sworn represented) adopted. Plan is step system to range maximum for most employees; combination steps to control point with pay-for-performance for department heads and nursing home.	Amanda Welch 715.258.6211

**Representative List of Recent Public Sector Projects**

Wood County	Two pay plans covering all employees (except sworn represented) adopted. Plan for non-supervisory staff is step system. All managers and supervisors have a combination plan with a step system to control point and pay-for-performance to range maximum.	Warren Kraft 715.421.8805
<b>Cities and Villages</b>		
City of Appleton	Uniform pay plan covering all employees (except sworn represented) adopted. Plan is an open range pay-for-performance system. [Market Update completed in 2015.]	Sandy Behnke 920.832.6458
City of Brooklyn Park, MN	Comprehensive update of pay plan for both FLSA Exempt and Non-Exempt staff.	Beth Toal 763.493.8012
City of Burlington [In Process]	Comprehensive compensation study covering all non-represented City staff.	Megan Watkins 262.342.1168
City of De Pere	Uniform pay plan covering all employees (except sworn represented). Plan is combination step system to control point with pay-for-performance to range maximum.	Shannon Metzler 920.339.4045
City of Fitchburg	Uniform pay plan covering all employees (except sworn represented). Plan is combination step system to control point with pay-for-performance to range maximum.	Lisa Sigurslid 608.270.4211
City of Fond du Lac	Uniform pay plan covering all employees (except sworn represented) adopted. Plan is a step system to range maximum.	Deborah Hoffmann 920.322.3625
City of Green Bay [In Process]	Comprehensive compensation study covering all non-represented City staff.	Lynn Boland 920.448.3147
City of Jefferson	Uniform pay plan covering all employees (except sworn represented). Plan is combination step system to control point with pay-for-performance to range maximum.	Tim Freitag 920.674.7700
City of Kenosha	Comprehensive pay plan for all City staff, except unionized police, fire, and transit. Covers independent City water/wastewater utility, as well. Plan is a step system, but our work also included the development of a performance management and employee development system.	Steve Stanczak 262.653.4128
City of Manitowoc	Plan is step system with commitment to convert to combo system.	Rochelle Blindauer 920.686.6995
City of Marshfield	Uniform pay plan covering all employees (except sworn represented). Plan is combination step system to control point with pay-for-performance to range maximum.	Jennifer Rachu 715.486.2004
City of Merrill	Uniform pay plan. Plan is step system to the range maximums.	David Johnson 715.536.5504
City of Neenah	Uniform pay plan covering all employees (except sworn represented) adopted. Plan is an open range pay-for-performance system.	Heather Barber 920.886.6103
City of Oconomowoc	Pay plans for FLSA Exempt and Non-exempt classifications. Market update in 2015.	Tony Posnik 262.569.3225
City of Oshkosh	Uniform pay plan covering all employees (except sworn represented) adopted. Plan is combination step system to control point with pay-for-performance to range maximum. [Market Update in progress, including comprehensive analysis of City Manager compensation.]	John Fitzpatrick 920.236.5112
City of Platteville	Comprehensive compensation study covering all non-represented City staff.	Karen Kort 608.348.1821
City of Racine [In Process]	Comprehensive compensation study covering all non-represented City staff.	Timothy Thompkins 262.636.9175
City of River Falls	Uniform pay plan covering all employees. Plan is combination step system to control point with pay-for-performance to range maximum.	Scot Simpson 715.426.3402
City of South Milwaukee	Uniform pay plan. Plan is step system to the range maximums.	Tami Mayzik 414.768.8051

**Representative List of Recent Public Sector Projects**

City of Superior	Uniform pay plan with step system to the range maximums.	Cammi Koneczny 715.395.7210
City of Watertown	Uniform pay plan covering all employees (except sworn represented). Plan is a step system, with the intent to move to a combination step system to control point with pay-for-performance to range maximum.	Mayor Ron Krueger 920.262.4000
City of Wauwatosa	Uniform pay plan covering all employees (except sworn represented). Plan is combination step system to control point with pay-for-performance to range maximum. Market update in 2015.	Beth Aldana 414.479.8906
City of West Allis [In Process]	Comprehensive compensation study covering all non-represented City staff.	Rebecca Grill 414.302.8294
Village of Weston	Designed uniform pay plan. Plan is combination step system to control point with pay-for-performance to range maximum. Current project to develop employee development process.	Daniel Guild 715.241.2600
Village of Shorewood Hills	Comprehensive compensation study covering all non-represented City staff.	Chris Swartz 414.847.2701
<b>Education</b>		
Mid-State Technical College	Uniform pay plan covering all employees (except faculty) adopted. Plan is an open range pay-for-performance system.	Brianne Petruzalek 715.422.5351
DC Everest School District	Compensation study covering administrators and support staff.	Dr. Kim Hall 715.359.4221 x 1225
Marshfield School District	Compensation study of all administrative positions.	Patrick J. Saucerman 715.387.1101
Neenah Joint School District	New pay plan for former bargaining unit support staff employees. Plan is combination step system to control point with pay-for-performance to range maximum.	Vicky Holt 920.751.6800
Southern Door School District	Staffing and compensation study of administrative support positions. Compensation studies for faculty (adopted) and for administrators and educational support staff (in process).	Patricia Vickman 920.825.7311
Stevens Point School District	Designed pay plans for staff, administration, and phase I of faculty plan.	Florence Haley 715.345.5512
<b>Long Term Care District</b>		
Western Wisconsin Cares	Comprehensive compensation study covering all District staff; nearing completion. Uniform pay plan. Plan is step system to the range maximums.	Bev Monahan 608.785.5718
<b>Utility</b>		
NEW Water	Comprehensive wage survey and pay plan review.	Trisha Brown 920.438.1052
Green Bay Water Utility [In Process]	Uniform pay plan. Plan is step system to the range maximums. Currently assisting with employee development, strengths-based leadership, and employee engagement.	Nancy Quirk 920.448.3499
Milwaukee Metropolitan Sewerage District [In Process]	Comprehensive pay plan review.	Candace Richards 414.225.2117
City of Racine Water and Wastewater	Comprehensive wage survey and market review.	Keith Haas 262.636.9434

**THE HARDING GROUP L.L.C.**  
MANAGEMENT SERVICES

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**TOTAL COMPENSATION  
CLASSIFICATION STUDY  
REQUEST FOR PROPOSAL  
CITY OF PORTAGE  
SEPTEMBER 9, 2016**

THE HARDING GROUP • P.O. Box 625 • Chippewa Falls, WI 54729  
Cell: (715) 828-6828 • Fax: (715) 723-5941 • Office: (715) 723-4865  
[www.hardinggroup.biz](http://www.hardinggroup.biz) • Email: [marc@hardinggroup.biz](mailto:marc@hardinggroup.biz)

**TO: Rick Dodd, Shawn Murphy, and Human Resource Committee members, City of Portage**  
**FROM: Marc R. Harding, Principal The Harding Group LLC**  
**RE: RFP response**  
**DATE: September 9<sup>th</sup>, 2016.**

**Thank you for the opportunity to respond to your request for proposal. We believe based on our past work experiences and our consulting experiences we meet the prerequisite requirements you are looking for in a firm to complete this project.**

**We are uniquely qualified because:**

- a) We have completed similar projects in both the private and public sector.**
- b) We are familiar with the city, community and staff because we have done similar work with the city in prior engagements.**
- c) Our principal is a Certified Compensation Professional with World At Work, an international organization of certified professionals.**
- d) We have been doing similar work for over 40 years both inside companies and on a consulting basis.**
- e) Our approach is customized to each of our clients so we can meet their needs in a way that works best for them.**

**In this project as in others like this we would start with what is the total compensation philosophy of the organization and then work the pieces below to arrive at a system that best fits your needs. We can do this in a two ways: one we can use a committee of employees to help work through this and/or we can work with the council and City Administrator.**

**Please feel free to contact us with any clarifying questions you might have on any of this.**

**1) WHO WE ARE:**

THE HARDING GROUP LLC, IS A MANAGEMENT CONSULTING FIRM THAT HAS BEEN IN BUSINESS SINCE 1994 AND IS LOCATED IN CHIPPEWA FALLS WISCONSIN. WE HAVE ATTACHED A DESCRIPTION OF THE BUSINESS (ABOUT US) AND WHAT SERVICES WE PROVIDE FOR YOUR REVIEW. (WHAT WE DO.) YOU CAN ALSO GO TO [WWW.HARDINGGROUP.BIZ](http://WWW.HARDINGGROUP.BIZ) FOR A COMPLETE DESCRIPTION OF OUR FIRM, PEOPLE AND SERVICES WE PROVIDE.

**2) QUALIFICATIONS:**

THE INDIVIDUALS INVOLVED IN THE PROJECT HAVE OVER 60 YEARS OF PUBLIC SECTOR EXPERIENCE EITHER IN A STAFF ROLE OR IN A CONSULTING ROLE. MR. HARDING HAS HAD A CERTIFICATION THROUGH WORLD AT WORK SINCE 1989 AND HAS COMPLETED NUMEROUS COMPENSATION PROJECTS IN BOTH THE PRIVATE AND PUBLIC SECTOR. AT THIS POINT WE HAVE NO INTENTION OF USING ANY OTHER FIRM.

**3) SIMILAR PROJECTS:**

WE HAVE COMPLETED SIMILAR PROJECTS WITH THE FOLLOWING GROUPS (DETAILED INFORMATION IS ON THE REFERENCE SHEET.)

- 1) RUSK COUNTY MEMORIAL HOSPITAL, LADYSMITH WISCONSIN.
- 2) CITY OF MENOMONIE, MENOMONIE WISCONSIN.
- 3) CITY OF RICE LAKE, RICE LAKE, WISCONSIN.
- 4) RIVERLAND ENERGY COOPERATIVE, ARCADIA WISCONSIN.
- 5) CITY OF PORTAGE, PORTAGE, WISCONSIN.

**4) PROFILES OF THE KEY PEOPLE. (SEE ATTACHED)**

**5) AVAILABILITY TO COMPLETE WORK:**

WE SHOULD NOT HAVE ANY ISSUES ACCOMPLISHING THE OBJECTIVES OF THIS PROJECT IN THE TIME FRAME ALLOTTED. CURRENTLY WE HAVE ABOUT 3-4 PROJECTS IN VARIOUS STAGES OF COMPLETION AND WE ARE IN DISCUSSION WITH SOME OTHER GROUPS TO INITIATE WORK.

## **SCOPE OF SERVICE**

**Based on our review of the RFP, it is our understanding that the following actions would occur with a group of about 50 jobs:**

- 1) Review current job classifications and position descriptions, evaluate and validate for knowledge, skills, abilities, essential functions, education/experience, supervision received and any licensing/certification requirements for positions in Administration, Clerical, Engineering, Public Safety and Public Works(custodial, parks, streets and utilities) areas.**
- 2. Conduct interviews with employees and supervisors as needed.**
- 3. Identify appropriate benchmarking standards and conduct salary/wage surveys as needed for similar position with comparable municipalities and businesses.**
- 4. Evaluate and comment on the quality, cost and level of City's employee benefits.**
- 5. Conduct an overall review of total compensation system, performance management system and identify potential pay compression and inequities internally and externally and provide recommendations to address. Evaluate administration of current system and provide recommendations for improvement.**
- 6. Evaluate proposed classifications for Teamsters local 695 that will be decertifying effective 1/1/2017.**

**Our estimated fees are outlined below.**

<b>Scope work</b>	<b>Estimated fees</b>	<b>Project Total Estimated Costs</b>
<b>Sections 1, 2 and 6</b>	<b>\$6,000.00</b>	<b>\$6,000.00</b>
<b>Sections 3 and 4</b>	<b>\$5,000.00</b>	<b>\$11,000.00</b>
<b>Section 5</b>	<b>\$4,000.00</b>	<b>\$15,000.00</b>
<b>Expenses</b>	<b>10 trips @ \$200.00 Per trip=\$2,000.00</b>	<b>\$17,000.00</b>

**Billable fees for consultants.**

<b>Principal</b>	<b>\$1,000.00-\$1,500.00 per day</b>
<b>Sr. Consultants</b>	<b>\$50-75.00 per hour</b>
<b>Consultants</b>	<b>\$40-60.00 per hour</b>

## **REFERENCES**

**Jeff Grothman  
Former Mayor,  
City of Portage**

**Total compensation analysis and survey work  
Portage, Wi  
608-742-2228**

**Lowell Prange  
City Administrator  
City of Menomonie  
2 compensation survey's  
Menomonie, Wisconsin  
715-232-2187 ext. 101**

**Gerald Sorenson  
CEO  
Riverland Energy Cooperative  
Total Compensation analysis  
Arcadia, Wisconsin  
608-323-3381**

**Curt Snyder  
City Administrator  
Benefits survey  
City of Rice Lake  
Rice Lake, Wisconsin.  
715-234-3454**

**Charisse Oland  
CEO  
Total Compensation analysis and salary and benefit changes  
Rusk County Memorial Hospital  
Ladysmith, Wisconsin.  
715-532-5561**

# THE HARDING GROUP L.L.C.

## MANAGEMENT SERVICES

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### *About Us:*

**The Harding Group** LLC was started by Marc Harding in the fall of 1994 as a Human Resource consulting firm with the purpose of providing HR services for small to medium- sized firms in northwestern Wisconsin.

Marc had 14 years of experience with Cray Research Inc. and wanted to remain in the area. Prior to Cray he was with two counties in administrative and human resource related jobs for more than 6 years. The firm has since evolved into a broader management consulting firm providing a variety of services to private, public and nonprofit organizations. The services focus on improving organizational and individual performance. Marc expanded the scope of services in 1997 when he partnered with Thompson Consulting by providing career transition services and opening offices in Eau Claire, Wisconsin and Duluth, Minnesota. In 2005 he added another suite of services by becoming a Strategic Business Partner with Profiles International, a firm that provides online assessment tools for talent management and organizational assessment. Another milestone was the inception of a Business Advisory Board service where small business owners assist each other as advisors.

Over the years a number of the firm's clients have won numerous awards at the local, state and national level. The Harding Group, LLC is now servicing clients in multiple industry segments in the profit, nonprofit and public sectors. We have clients we have supported who maintain offices on both coasts and have supported international work.

Our extensive experience has taught us if all elements of an organization are in alignment, performance can be exceptional. These elements include: The business Plan, the right Organizational structure, the right People and the right Systems.

Our team today consists of as many as seven to ten multi-disciplined people who are selected specifically to work on each project based on the needs and the industry of the client. Their credentials can be viewed on the *Who We Are* section of the Harding Group LLC website.

***Mission: Provide exceptional services to our clients that increase their organizational or personal performance level.***

# THE HARDING GROUP L.L.C.

## MANAGEMENT SERVICES

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### **What We Do:**

*The Harding Group provides a full suite of business services targeted at improving your bottom line. We do this by focusing on your most important asset your Human Capital. Our services have been instrumental in making organizations more successful. Our clients have been pleased with the quality, leadership and perspective we bring to their businesses. We follow our POPS process in diagnosing and improving your business. Our major services include:*

#### **Total Compensation System Design:**

*Including base, sales, incentive, executive compensation, and benefit plan design. Your base pay, reward and recognition systems should reflect the operating results you are trying to attain and should reinforce the culture you are attempting to create. We can provide analysis, development, and implementation of creative reward and recognition programs that will provide return on this sizable investment.*

#### **Talent Management Services:**

***Talent Acquisition:** For executive, professional, managerial, and board level candidates. One of the most important aspects of all Human Resource functions is that of selecting and hiring the right person for the job. We can provide the appropriate staffing process and job search strategies for various levels of employment for your organization.*

***Talent Assessment:** We have access to a suite of assessment tools that can be used for selection, development, succession planning and executive coaching.*

***Talent Development and Coaching:** We provide a suite of development services targeted at the full range of needs including leadership, employee and organizational assessment and development, and coaching.*

***Talent Engagement:** Our consultants are experts at working with individuals and teams and assessing engagement issues and providing solutions in the form of cultural and employee satisfactions assessment, team building, change management and a variety of other engagement programs.*

***Talent Systems effectiveness:** We have extensive experience working in identifying critical systems impacting groups and individuals performance. We develop solutions that could range from implementing new performance management systems to organizational metrics systems that support your business strategies.*

# THE HARDING GROUP L.L.C.

## MANAGEMENT SERVICES

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### MARC R. HARDING

#### Principal The Harding Group LLC

**Marc R. Harding** is a seasoned executive with over 30 plus years of experience in human resources and general management in both the private and public sector. He started his career in the public sector working for two counties over a seven year time frame in a human resource and administrative management roles. From there he spent fifteen years with Cray Research Inc the leading supercomputer manufacturer where he was part of a team instrumental in helping grow the business from a 400-employee site to a 3000-employee site in an eight-year time frame. Since 1995 he has led a regional management consulting practice doing work with both private and public sector clients. During this time he has worked with a number of small to medium sized industry-leading businesses including start up operations in a variety of contract Human Resource and General Management roles.

His areas of expertise are Total Compensation System Design, Executive and Professional Search, Human Resource Management System Development, Organizational Design and Effectiveness, Business Development and Planning and Performance Management Systems. He has developed a client base in excess of 100 in the years he's been consulting. Six have won state or national awards for their growth and his retained clients have a growth rate in excess of 20%. His background in high change environments has provided him with a unique perspective on what it takes to be successful in today's global economy.

Marc holds a bachelor's degree from the University of Wisconsin at LaCrosse. He has had numerous Continuing Education courses in the Human Resource and General Management fields. These are highlighted by a certification from the American Compensation Association as a Certified Compensation Practitioner. Harvard Leadership courses in Finance, Business Planning, Marketing and Strategic Planning. Intensive training offered through the University of Michigan on Change Leadership.

He is a member of the Society of Human Resource Management, and World at Work professional organizations.

He has been active in the community with a variety of organizations such as Lakeland College Advisory Board, Chippewa Falls Chamber of Commerce, St. Joseph's Hospital Advisory Council, Chippewa Valley Technical College Foundation Board, Chippewa Valley YMCA Board, the United Way, Chippewa County Economic Development Corporation and Momentum West.

# THE HARDING GROUP L.L.C.

MANAGEMENT SERVICES

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## CARINNA M. HARDING

### Consultant, The Harding Group LLC

**Carinna Harding** is an experienced business, project management and leadership professional with 10 plus years of experience in the health care field. As a project manager for EDS/HP she had significant experience working on health care related projects and with technical staff in development of systems to support the Medicaid Management system for the State of Wisconsin.

In her role with The Harding Group she has provided ongoing administrative and professional support on a large variety of assignments, which have included large scale survey work, recruiting, career transition and other Human Resource related projects.

#### Significant Accomplishments

- Managed the implementation of Medicare Part D and BadgerCare Plus programs
- Led increasingly larger teams of technical and non-technical staff overseeing their workload and priorities

#### Education

- MS Epidemiology, December 2002 University of Wisconsin-Madison,
- BS Zoology, May 2001 Business Certificate May 2001

# THE HARDING GROUP L.L.C.

## MANAGEMENT SERVICES

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**John C. Krizek,**

**Sr. Consultant The Harding Group LLC**

**John C. Krizek** has been a leader of Public Sector government in Western Wisconsin for over 24 years and has an outstanding reputation for Lean Budgeting and Labor Relations. In addition he has over 14 years of Operations Management experience in manufacturing where most recently he implemented the Toyota Lean Manufacturing Model. Expertise include but are not limited to, Operations Management, Budgeting that drives out waste, Executive Team Building, Labor Relations, Risk Management, Training, Benefits Design and Cost Reduction.

John has proven experience in evaluating operations problems and incorporating existing resources to provide long term solutions and impressive results. Some of his accomplishments include:

- Certification in Lean Operations Management (University of Kentucky). Implemented Process improvement, space utilization and inventory reduction.
- Developed and Administered 24 annual County Budgets that reduced the tax rate and maintained quality services,
- Management Negotiator of labor contracts with AFSCME, Teamsters and United Rubber and Cork workers. Experience in Union de-certification, accretion, interest and grievance mediation/arbitration.
- Trained over 300 Andersen Windows production associates in the “Kaizen” problem solving process and “5’S” “Lean Transformation.
- Implemented an Injury Prevention and Workers Compensation Control Program that in one year reduced work related injuries by 25% and Workers compensation cost by 50%.
- Performed Public Officials Errors and Omissions risk assessments.
- Implemented PTO and Cafeteria benefit programs that made associates stakeholders.
- Served on Governor Thompson’s Task Force on Shared Revenue. Expert in how to manage municipal operations under the Tax Rate Freeze.
- Through “TQM” developed a collaborative relationship between 38 different departments to achieve the organizations goals.



*"Where the North Begins"*

City of Portage  
115 W. Pleasant Street  
Portage, WI 53901

Response to Request for Proposal  
Compensation/Classification Study for  
Selected Personnel

 **Paypoint HR**  
Strategic Compensation Plans by Design  
Paypoint HR, LLC  
695 Santa Maria Lane  
Davidsonville, MD 21035  
(443) 336-4272  
(443) 926-9930 FAX

Submitted on  
September 9, 2016

## About Paypoint HR

Paypoint HR, LLC (Consultant), whose primary office is located at 695 Santa Maria Lane, Davidsonville, Maryland 21035, is responding to the City of Portage, Wisconsin's (City, Client) request for proposals from qualified consultants to conduct a partial compensation and classification study.

Paypoint HR, LLC is an innovative, cost effective and technologically advanced solution for the public sector's need to provide internally equitable and externally competitive pay plans. We are an independent Woman Owned Small Business (WOSB) and our staff has provided compensation solutions to the public sector for decades.

Our overall approach to the field is unique. Our founding members hail from different practice areas related to classification and compensation. These specialty fields include; legal compliance, research analytics, business strategy and human resources (HR). The common denominator that brings us together is helping our clients recruit and retain quality employees. We do this by collaborating on each project to give our clients strategic recommendations for achieving their goals. We believe we are the only WOSB that brings together experts from multiple specialty areas to design custom classification and compensation plans that give our clients competitive edge in the labor markets where they compete.

Our team includes recognized experts in human resource management and understands that while we follow established standards applied through sound methodology, there is not a "one size fits all" solution to compensation management. The way we look at data is more thorough than our competitors. While we use the "standard" calculations for determining pay, we also have the ability to create ad-hoc reports that meet specific Client needs. Our in-house attorney helps develop legally compliant job descriptions and pay plans based on the most current regulations. Clients benefit from the legal review and appeals processes with a reduction in grievances and an improved sense of equity. Our recommendations take into consideration the business and operational side of organizations. We test our recommendations to ensure they are following sound business practices and will be a solid foundation for our clients going forward. The recommendations we make are intended to produce a structured program that gives ongoing guidance on how to improve the organization's ability to recruit, reward, motivate, and retain talent in a competitive environment.

Paypoint HR has proprietary cloud-based software, Position Vantage Point (PVP) to conduct position evaluations. This software helps quickly update the job descriptions with the input from employees. Because employees help design their job descriptions, they feel valued.

We are members of WorldatWork and the Society for Human Resource Management. Our staff personnel keep abreast of new and emerging trends through continuing education in their respective fields and collaborate on each project to bring best practices to our recommendations.

We feel our expertise, processes, people, survey data library, and proprietary cloud-based software distinguish Paypoint HR from other contractors and will help the client reach its Compensation Study goals

## Understanding of the Scope of Work

Paypoint HR recognizes that we will need to tailor our approach for the job classification and compensation study to fit the operating, fiscal, and competitive needs of the City. The City employs roughly 86 full-time equivalent employees of which, 47 non-represented full-time employees will be included in this study. The purpose of the study is to evaluate the City's present salary and benefit structure as compared to the job market for comparable positions in the private and public sectors. The evaluation will culminate in a final report generated by Paypoint HR and presented to the Common Council in 2017.

The functional areas included in this study are:

- Administration
- Fire
- Parks & Recreation
- Police,
- Public Works/Engineering, and
- Utilities

Specific elements to be provided in the scope of work include:

- Review of current job classifications and position descriptions based on key factors,
- Interviews with employees and supervisors as needed,
- Identification of appropriate benchmarking standards and implementation of salary/wage surveys as needed for similar positions with comparable public and private organizations,
- Evaluation and summary findings on the quality, cost and level of the City's employee benefit package,
- Overall review of the existing total compensation system and administration to identify potential pay compression, inequities internally and externally, and provide recommendations to correct and improve them,
- Evaluation of proposed classifications for positions affected by the Teamsters Local No. 695 non-recertification as of 1/1/2017, and
- Development of a final report, completed no later than April 30, 2017, for presentation to the Common Council.

## Statement of Current Workload

Paypoint HR has considered the time and resources necessary to meet the requirements of the City of Portages' Classification and Compensation study. Our current workload will not impede our ability to provide the City with quality service. At this time, we have only one other project underway and do not have any additional cases scheduled.

## Methodology

Our methodology is comprehensive and encompasses all of the requirements specified in the RFP. Phase A focuses on the Classification/Job Analysis Component. Phase B focuses on the Compensation Component. The standard methodology we will use to conduct both phases of the study will follow the steps laid out in the flowchart (see Figure 1) and delineated below.

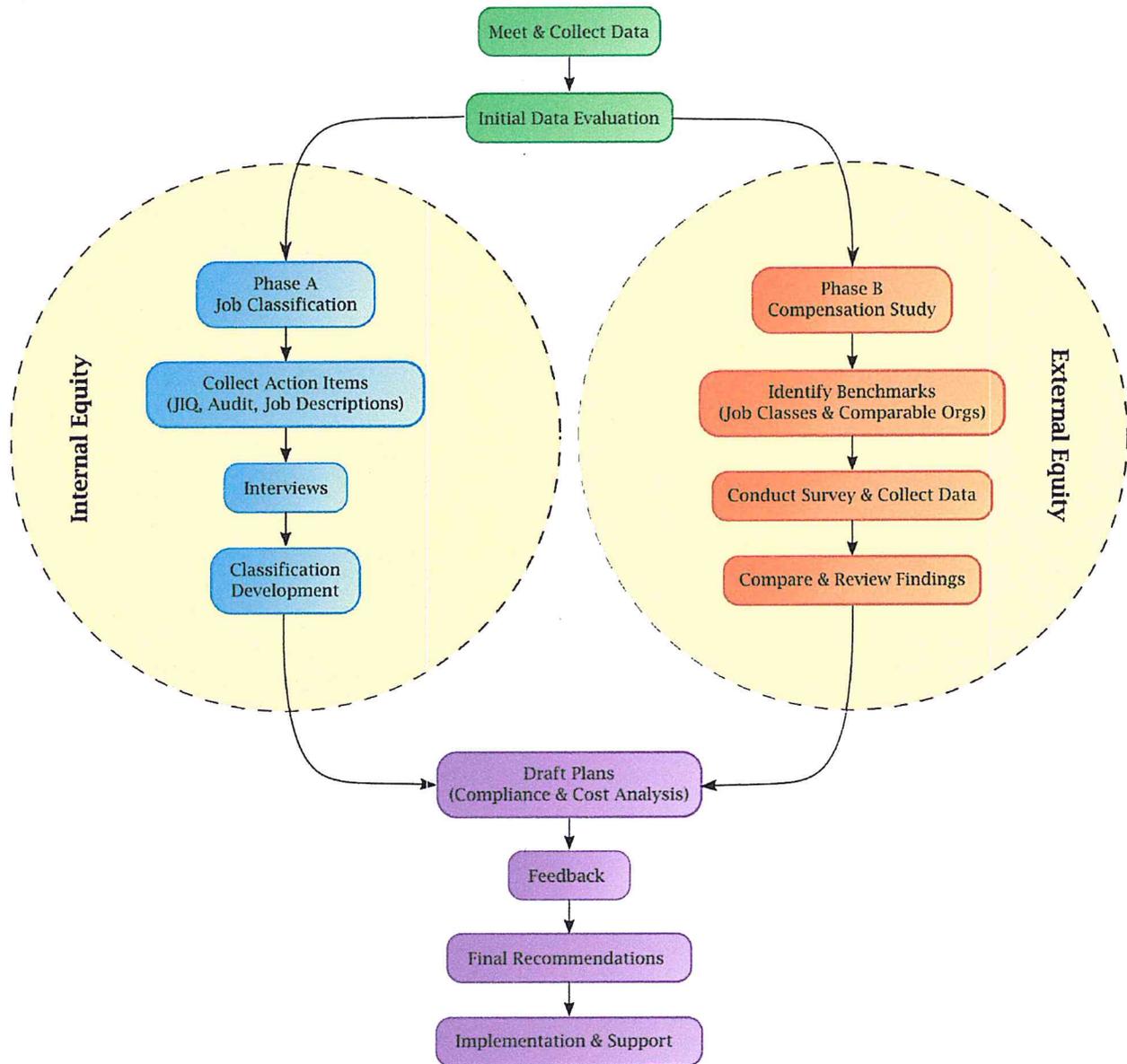


Figure 1 - Flow Chart

## About the City of Portage

In order to best meet the needs of the City, we have taken the time to educate ourselves on the City, its history and philosophy towards the future.

The City of Portage “Where the North Begins” has a rich history packed into its 10 square miles. It was established in 1854 and is the county seat for Columbia County. The Ho Chunk, (Winnebago), Menominee, Kickapoo and Chippewa Native American Tribes dominated the area during the 17<sup>th</sup> century. Both Native American tribes and European traders once lived in the area, and used the lowlands between the Fox and Wisconsin Rivers to move their goods. From 1673 through to 1848 the Fox-Wisconsin Waterway was one of the principal routes used by fur traders between the Great Lakes and the Mississippi watersheds. The completion of the Illinois and Michigan Canal and the introduction of railroads caused traffic to decline and in 1987 the canals were permanently sealed. Now, the Portage Canal is listed in the National Register of Historic Places.

## Transportation Infrastructure

It is important when looking at recruiting and retaining employees to consider how employees and candidates will get to and from work. Using one of the three interstate highways, Interstate 94, Interstate 90, and Interstate 39, Portage is a 30-minute commute to Madison and a 15 minute commute to Wisconsin Dells. The Portage Amtrak station serves as transportation between Chicago and Seattle with daily stops in Portage.

## Government

The City of Portage operates under the Mayor-Council form of government (Wisconsin Statutes Chapter 62) with an appointed administrator. The City elects one representative from each of its (9) Districts to serve on the Common Council. The Human Resources Committee (HRC) of the City Council (of which the Mayor is the chairperson) provides a recommendation to the Common Council for a candidate to fill the City Administrator position. In addition to helping vet qualified candidates for the City Administrator, the HRC assists the Council with general human resources support. The City Administrator recommends hiring of all full-time employees and directly supervises the day-to-day functions of the City.

The City Council sees its function as the elected body serving the shareholders (all citizens) of the City to:

- (1) ensure the long-term financial health of the City;
- (2) promote the highest level of quality of life in all aspects for all residents;
- (3) provide positive leadership for the entire county-wide community in all areas of municipal governance; and
- (4) encourage effective long-term planning in all considerations within Council purview.
- (5) ensure transparency and access to information.

## Progress

In order to meet the community's needs, the City has been innovative in the utilization of its resources and has been resilient through economic downturns. True to its history, the City's leadership team has been working on improving the local economy and has undertaken a strategic approach to development. The Canal Project received federal funding in 2001 and in 2006, construction began. The City's leadership and management team have been diligent in supporting the project and the Portage Canal Society continues to raise funds and make improvements. In the fall of 2015, ground was broken along the eastern part of the downtown section to construct government offices and is expected to be completed and open in 2017. In 2012, the City received a grant to build the Portage Enterprise Center to provide support for start-up manufacturers. The City has Portage Municipal Airport (C47) which serves the city and surrounding communities. The Airport is overseen by the City's Airport Commission and an Airport Manager. Currently the Airport Commission is seeking approval for its Airport Layout Plan (ALP).

According to a Huffington Post article in March of 2015 called *8 Innovations that Caught My Eye*, writer Ari Garber states,

*"What the city has done here, considering it's a town of 10,000 people about 45 minutes outside of Madison, is phenomenal. The city has worked with MATC or the Madison Area Technical College, to house some of their classes onsite, grooming the next generation of digital manufacturing skills and entrepreneurs. I was absolutely amazed that the most innovative grouping of education, business, and resources that I have seen in the past year, was right in my backyard in a town that is hitting WAY above its weight class!"*

## Paypoint HR's Experience with Similar Projects

Our knowledge of the public sector stems from years of experience working with clients in establishing total compensation plan designs and recommendations. We stay up to date on relevant industry trends and regulations. We consider best practices for pay grades, ranges, bands and job classifications. A couple of projects that we are most proud of include:

### ***Mid-America Regional Council***

The Mid-America Regional Council (MARC) is a nonprofit association of 119 city and 9 county governments and the metropolitan planning organization for the Kansas City region. MARC promotes regional cooperation and develops innovative solutions while providing a forum for the region to work together to advance social, economic, and environmental progress. Since 2005, MARC has been awarded a grant from the Federal Government to oversee Head Start and Early Head Start services in metropolitan Kansas City. Paypoint HR was given the responsibility for conducting a comprehensive classification and compensation study including all of its Head Start partner organizations approximately 645 employees. Previously, the individual entities conducted studies independently. We developed a method for collecting relevant data with the MARC project team. To do so, it was key for us to establish clear communication, timelines, expectations and reporting relationships. We were able to simplify job classes and standardize

the job descriptions with attention to compliance with federal, state and local regulations. We conducted a custom external market survey of for profit and non-profit organizations to glean important data and to compare it to our internal study findings for analysis. From there, we were successfully able to work with the project team to review findings, make recommendations, generate an implementation strategy and design long term administration guidelines. Recommendations for future adjustments of new hires, reclassifications, demotions, promotions, lateral transfers, overall maintenance and market adjustments were included in the final work product.

***Prince Georges County, Maryland***

We conducted scheduled internal and external equity analyses as well as grievance related reviews for the school system's 18,000 union and non-union employees. We completed market surveys and analyses with comparable organizations using local municipalities and public school systems with relevant similarities as comparator agencies. The unions consisted of 2 instructional and 3 administrative support groups.

The scope of work included executive level employees, union management and non-union management. We conducted an internal equity review which included interviews with management and employees, job information questionnaires, and an FLSA review to determine exempt, non-exempt and mixed class status. We initiated a program to correct and reverse previously misclassified jobs. We developed a Total Compensation Plan that included pay and benefits. We developed compensation plans for collective bargaining agreement acceptance and acted as lead negotiator on pay grades with the five (5) separate unions.

**Table 1 - References**

Contact Name /Type of Business	Address	Contact Info
Liz Smith Mid-America Regional Council Non-Profit Assoc. of Cities and Counties	600 Broadway, Suite 200 Kansas City, MO 64105	(816) 701-8348 LSmith@MARC.org
Patrick Coronado NASA Goddard Space Flight Center Federal Government	NASA GSFC Code 606.3 Bldg 28 Rm W186B Greenbelt, MD 20771	(301) 286-9323 Patrick.L.Coronado@NASA.gov
Kirk Perry Chief Office of the Asst Secretary for Civil Rights	1400 Independence Ave, SW Washington, DC 20250	(202) 720-2791 Kirk.Perry@ascr.usda.gov
Dr. William R. Hite, Jr * Superintendent of Schools, School District of Philadelphia	440 N. Broad Street Philadelphia, PA 19130	(215) 400-4000

Notes:

\* Dr. William R. Hite, Jr. is the reference for work performed for Prince George's County Public Schools.

## Key Personnel

Our personnel are well respected and have served as speakers for industry associations, financial organizations, universities and more. Our personnel are also members of industry organizations and serve on the Board for several groups. We have industry data readily available for use in our assessments. Information we have access to include the most recent survey reports conducted by industry associations, updates to regulations on a federal and state level, as well as latest trends and best practices. .



**Karin Campbell, SPHR, SHRM-SCP**

Bachelor of Science in Business Marketing, University of Maryland

E-Mail: Karin@PaypointHR.com

Telephone number: (443) 336-4272

Fax number: (443) 926-9930

Mrs. Karin Campbell has led Human Resource initiatives for more than 20 years. She has helped 700+ employers and 15,000 employees with the development and delivery of customized HR solutions for employee management programs; conducting labor cost analysis of employee administration, benefits, retirement, workers' compensation, federal, state, and local taxes; budgeting for human capital including recruiting, onboarding, benefits, risk management, training, and compliance; and planning, design and implementation of payroll administration, health, dental, vision, life, and AD&D insurance, pension as well as ancillary benefits within a limited timeframe to a large workforce.

She has consulted with clients and their employees on complicated employment topics. Her responsibilities also include development and maintenance of compliance and risk management programs. She has taught OSHA compliance as an adjunct professor. Currently she holds SPHR and SHRM-SCP designations and serves on the Board for the ASHRM chapter. Karin worked from 1995-2002 for HRLogic, Inc., a wholly owned subsidiary of Fidelity Investments. Most recently Karin owned her own HR firm, Alpine HR, from 2003 until 2012, when she sold her business. In 2013, Karin formed Paypoint HR, an HR consulting firm which specializes in employee compensation for both private and public sector concerns.



**Dr. Rick Campbell**

Ph.D. in Engineering Science and Mechanics, Penn State University

Bachelor of Science in Applied Mathematics, University of Virginia

E-Mail: Rick@PaypointHR.com

Telephone number: (540) 815-7838

Dr. Rick Campbell's extensive education and experience in the field of mathematics has enabled him to understand highly technical issues. Because he has managed both internal and external clients, he has developed the ability to take the most advanced problems and convert them into easily understood terms and processes.

He has worked for NASA GSFC, GE Aircraft, and Lockheed Martin Space Systems among others. His roles included Team Lead, Project Manager and Principal Engineer.

Dr. Campbell holds 7 U.S. and international patents for his creative ideas on product and process improvement. Rick is experienced with Lean Six Sigma for both service organizations and manufacturing organizations. He brings his unique skills to Paypoint HR in order to improve the accuracy of our research findings and recommendations.



**Steve Hall**

Master of Business Administration, Rollins College  
Bachelor of Arts in Business Management, Rollins College

Steve has over 30 years of successful corporate sales and executive leadership experience in high-growth businesses. He guides serious individuals through corporate sales boot camps with ongoing reinforcement webcasts. In addition, he excels in delivering keynote talks, topical workshops such as Leadership, Extended DISC® and Maximize LinkedIn for selling professionals. He also recruits, assesses and helps to select and then train new sales hires for clients.

Steve spent 5 years as President/CEO of a global retail loss prevention company. This was preceded by multiple successful high-tech Sales VP positions in the supply chain management, data collection, retail security and telecommunications industries. Steve has led teams from as few as 5 to over 130 in both direct and channel business development models. He has jump-started early stage companies and has been VP Sales in a \$1B publicly traded company.

Steve has been a featured speaker and trainer for the Veteran's Administration Benefits Management Conference. He was the keynote speaker for Datamax Corporation's annual client meeting. Other organizations where he has been a featured speaker and trainer are the Anne Arundel Medical Center and Maryland State Department of Education.



**Syndy J. Shilling, Esq.**

Juris Doctor, University of Baltimore School of Law  
Master of Science in Educational Leadership, The John Hopkins University  
Master of Arts in English and Rhetoric, University of Maryland  
Bachelor of Arts in English Education, University of Maryland

Mrs. Syndy J. Shilling, Esq., is an attorney and professor for the University of Maryland. She oversees operations of the student legal aid clinic and teaches pre-law. She serves on the committee responsible for review and development of new and revised policies related to Title IX and equity, diversity, and inclusion issues. She assists students in Code of Conduct and Title IX proceedings.

Syndy worked in the public sector for over 11 years. Syndy's responsibilities included legal review of all job descriptions, compensation studies and classification reviews for instructional positions (teachers, teacher assistants), administrative positions (school leadership roles, central office positions), and non-instructional (food service, maintenance, school resource officers, bus drivers, and management). During this time, she was responsible for legal review of all human resources policies and administrative regulations.

## Schedule of Fees

The standard consulting rate for the senior personnel listed, consistent with the Federal GSA schedule, is \$125 per hour of service. The Classification portion of the study, Phase A, is expected to take 68 hours with a lump sum fee of \$8,500 while the Compensation portion, Phase B, will take 84 hours for a lump sum fee of \$10,500. The total fee for both Classification and Compensation would be \$19,000. Our fee includes expenses associated with travel, phone, materials, and supplies.

In general, projects of this scope and size take 12 weeks to complete.

**Table 2 - Classification & Compensation Study Task Hours**

### PHASE A Classification Study

Task	Hours
A Initial Document Review/Meetings with Study Project Team	8
B Initial Evaluations	8
C Collection and Acknowledgement of Action Items	8
D Employee/Supervisor/Management Buy-In	8
E Classification Concept/Preliminary Allocation	10
F Job Class Description Development/Compliance Review/Update	8
G Draft Class Description Review/Informal Appeal Process	8
H Finalize Compliant Classification Plan/Draft Interim Report	10
<b>Subtotal Professional Hours</b>	<b>68</b>

### PHASE B Compensation Study

Task	Hours
A Identify Benchmark Classifications, Targets and Benefits to be Collected	6
B Compensation Data Collection	12
C Analysis and Preliminary Data Review	18
D Draft Compensation Findings/Additional Analysis/"Working Group" Meeting	6
E Internal Relationship Analysis/Internal Alignment	10
F Compensation Structure/Implementation Plan/Compliance Review	8
G Development of Summaries, Final Report and Deliverables	8
H Final Presentations and Post Implementation Support	16
<b>Subtotal Professional Hours</b>	<b>84</b>

<b>Total Estimated Hours of Phase A &amp; Phase B</b>	<b>152</b>
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## Executive Summary

While the City has done much to improve in the areas of infrastructure, image and economy, it is time to take a look at the people who serve the community to make sure they are being treated fairly. Paypoint HR, LLC realizes that the employees are the City's most valuable asset and will be treated accordingly. By including employee input in the project it is our experience that they feel "heard" and "valued." As such, they will be more likely to find the pride and fulfillment that public service lends. This forward thinking philosophy ensures the City of Portage will be seen as a great place to make a career as well as make a living.

City's 86 employees focus on a wide variety of projects, tasks, and initiatives in approximately 32 distinct job titles. This project is to include 47 non-represented staff. There are approximately eight (8) municipal work-sites, included in this study which may involve separate orientations for each work group.

Obstacles the City has possibly experienced with regard to its ability to attract, motivate, and retain employees are

- Increase in community demands and expectations for service offerings paired with limited resources to quickly adapt;
- Reorganization of operations;
- Difficulty recruiting qualified individuals for certain positions;
- Internal and external pay equity concerns;
- Compliance with employer regulations such as Fair Labor Standards Act (FLSA),
- Pay compression;
- Methodology for career progression; and,
- Adjustments to existing plan have been reactionary, raising questions on the integrity of the plan.

These obstacles are independently problematic and collectively require a change from a tactical HR management style to a strategic HR management philosophy. We believe developing a long term strategy for recruiting and retaining employees is the true intent of this RFP. Paypoint HR, LLC understands we will be working with the Common Council, Human Resources Committee, City Administrator, key leadership staff, and stakeholders (Project Team) to validate the scope of services, methodology, timeliness, and other deliverables.

Paypoint HR has 4 senior staff ready to be deployed for this project and has the resources to confidently provide the City with exceptional service on this important project. We anticipate three (3) on-site visits, but we remain flexible to meet the needs of the City. Our fees are fixed price and include flights, travel time, hotel, auto, phone and basic supplies. We are planning that one meeting will be used to kick-off the project, one meeting to coordinate activities with the project team, and one to present the findings of the study. Our communication plan and Agile work philosophy will ensure the project stays on schedule, with a final report available for review no later than April 30, 2017.

Thank you for your consideration.