

A Proposal to Provide On-Call Human Resources Consulting for Topeka Metropolitan Transit Authority

ORIGINAL



Evergreen Solutions, LLC

September 26, 2019

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Submitted to:

Topeka Metropolitan Transit Authority
Attn: Richard Appelhanz
201 North Kansas Avenue
Topeka, KS 66603

Submitted by:



Evergreen Solutions, LLC
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Topeka Metropolitan Transit Authority
Attn: Richard Appelhanz
201 North Kansas Avenue
Topeka, KS 66603

SUBMITTED VIA EMAIL: rappelhanz@topekametro.org

Dear Mr. Appelhanz:

Evergreen Solutions, LLC is pleased to submit this proposal to provide On-Call Human Resources Consulting for the Topeka Metropolitan Transit Authority (Metro). Our response is based on our review of the Request for Bids (RFB TO-20-07); our understanding of the Kansas labor market; our experience working with public transportation-related entities, hundreds of local governments and other public sector organizations, throughout the country; and our knowledge of best practices in human resources management.

In 2004, Evergreen Solutions was formed to provide an alternative to traditional consulting firms. We provide an innovative and effective option by focusing on clients needing partners and not simply another service provider. As a female-owned business, we are certified as a W/MBE in many states and municipalities across the country.

As a national firm, Evergreen Solutions continues to grow and our territory now includes clients in 46 states. In the State of Kansas, our consultants have worked with Ellis County and Sedgwick County on projects that involved human resources consulting services.

Outside of Kansas, the Evergreen Team has worked with, or is currently on contract to work with, the following local governments in a variety of human resources and management capacities that involved services similar in scope to those being requested: For example, City of Lee's Summit, MO; City of Branson, MO; City of Columbia, MO; Jefferson County, MO; St. Charles County, MO; City of Manitou Springs, CO; City of Fountain, CO; Ouray County, CO; **Davidson Transit Authority, TN**; Blount County, TN; **Dallas Area Rapid Transit, TX**; City of Austin, TX; City of Fate, TX; City of Duncanville, TX; City of Seguin, TX; City of Rowlett, TX; City of Sachse, TX; City of Pflugerville, TX; City of Fredericksburg, TX; City of Conroe, TX; City of Amarillo, TX; City of Page, AZ; Town of Sahuarita, AZ; Ogden City Corporation, UT; City of Reno, NV; City of Albany, OR; Spokane County, WA; City of Bloomington and **Bloomington Transit, IN**; **Fort Wayne-Allen County Airport Authority, IN**; Mahoning County, OH; **Central Ohio Transit Authority, OH**; **Western Reserve Transit Authority, OH**; City of Pittsburgh, PA; County of Montgomery, PA; City of Hyattsville, MD; City of Annapolis, MD; City of Westminster, MD; Allegany County, MD; Washington County, MD; Kent County Levy Court, DE; Ulster County, NY; City of Newport News, VA; City of Suffolk, VA; City of Fredericksburg, VA; City of Covington, VA; City of Williamsburg, VA; County of Culpeper, VA; County of York, VA; Gloucester County, VA; Essex County, VA; Surry County, VA; Isle of Wight County, VA; Prince George County, VA; James City County, VA; Louisa County, VA; Loudoun County, VA; Greensville County, VA; Spotsylvania County, VA; King George County, VA; Alleghany County, VA; City of Raleigh, NC; Union County, NC; Gaston County, NC; New Hanover County, NC; Guilford County, NC; Buncombe County, NC; City of Columbia, SC; City of Lancaster, SC; City of Chester, SC; City of Mauldin, SC; City of Goose Creek, SC; City of Conway, SC; Berkeley County, SC; Charleston County, SC; Dorchester County, SC; City of Douglasville, GA; City of Alpharetta, GA; City of Brookhaven, GA; City of Statesboro, GA; City of Garden City, GA; City of Stockbridge, GA; City of Fayetteville, GA; City of Dublin, GA; City of Roswell, GA; City of Tybee Island, GA; City of Chamblee, GA; City of Savannah, GA; City of Kingsland, GA; Forsyth County, GA; Lumpkin County, GA; Douglas County, GA; Cherokee County, GA; Riviera Utilities Authority, AL; City of Foley, AL; Baldwin County, AL; **Sarasota-Manatee Airport Authority, FL**; **Orlando-Orange County Expressway Authority, FL**; **Hillsborough Area Transportation**

Authority, FL; Santa Rosa County, FL; City of Melbourne; Monroe County, FL; Brevard County, FL; City of Sarasota, FL; City of Winter Park, FL; City of Palm Beach Gardens, FL; City of Plant City, FL; City of Temple Terrace, FL; City of Panama City, FL; City of Coral Springs, FL; City of Doral, FL; City of Hollywood, FL; City of Dania Beach; City of Ft. Myers, FL; Miami-Dade County, FL; Alachua County, FL; Manatee County, FL; Seminole County, FL; Martin County, FL; Sarasota County, FL; Pinellas County, FL; Palm Beach County, FL; and many others. The services provided to some of these clients can be found in **Section 2** of our proposal.

The Evergreen Solutions Team is able to fully comprehend the challenges and goals of Topeka Metro because of our vast understanding of human resources and public sector organizations, and the fact that we possess the necessary experience and qualifications. Our team has significant expertise in providing wage/salary ranges and allocation; performance appraisal systems, tools, and processes; customized employee training; policy development and revision; the creation of new or updated existing job descriptions; ongoing management training and coaching; assistance in the hiring process for executive positions; salary benchmarking; performance reviews; maintenance of personnel records; and similar human resources work for public sector organizations. In addition, Evergreen Solutions has focused on the following human resource services: labor market surveys, classification and compensation studies; benefits surveys; recruitment, hiring, and retention studies; strategic and workforce planning; staffing and efficiency studies; and labor pool availability.

Through our experiences in conducting this wide range of projects, we have gained the knowledge of every aspect of the management and operations involved in public sector human resources. As a result, our team understands how critical effective human resources services are in the overall operation of a proficient and progressive municipality.

Our approach to providing human resources consulting services draws not only from extensive work with public sector clients, but also from direct feedback of our past clients. In essence, we offer our clients tools that are innovative as well as those that have been proven to work in real places with real people.

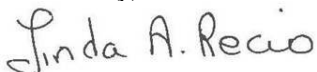
Some of the key facets of Evergreen Solutions' approach include:

- We emphasize communication and feel it is a critical component to successful human resources services. Our team understands that change by its very nature creates anxiety in staff and managers alike. In order to ensure success, administration, department heads, and employees need to be involved in each step of the process that applies to them. This is a critical component of our communication plan.
- Our methodology utilizes the latest in technology in order to reduce the cost to our client partners and enhance wider participation. We offer tools that are in an electronic format. In essence, many steps commonly involved in human resources consulting services can be completed on the Web.
- We understand that one size does not fit all and some consultants provide the same overall solution to every client. Evergreen takes great pride in providing a variety of alternatives that allow our client partners to select the solution that best meets their business and human capital needs.

As President of Evergreen Solutions, LLC, I am authorized to commit our firm contractually to this assignment. All required certifications, including the Price Quote form, can be found in **Section 3**. We appreciate this opportunity and commit to you our best effort if selected for this study.

If you have any questions, please feel free to contact me at (850) 383-0111 or via email at Linda@ConsultEvergreen.com.

Sincerely,



Dr. Linda Recio
President



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Section 1.0:
Project Understanding



1.0 Project Understanding

In this section we provide our understanding of the consulting services being requested, our overall approach and methodology for providing On-Call Human Resources Consulting services described in the RFB for Topeka Metropolitan Transit Authority (Metro).

1.1 Understanding of the Project

Our firm understands that Metro is seeking *qualified firms to provide on-call human resource consulting services ... and support to [Metro's] Human Resources Director, General Manager and Board of Directors* for a period of five years.

Evergreen Solutions has *sufficient experience and [the] qualifications to manage and coordinate all assigned human resource projects in a retainer relationship, and in accordance with the specifications contained in the RFB.*

Our team of recognized experts *will provide clear, concise and readable reports and other deliverables [that] include analysis and recommendations based upon Metro's current financial situation and capabilities.*

We recognize that possible project assignments requested by the HR Director or General Manager include, but are not limited to:

- *wage/salary ranges and allocation;*
- *performance appraisal systems, tools and processes;*
- *customized employee training;*
- *policy development and revision;*
- *create new or update existing job descriptions;*
- *ongoing management training and coaching; and*
- *assist with the hiring process for executive positions.*

Further, we understand that the Board of Directors may assign projects including, but not limited to:

- *hiring;*
- *salary benchmarking;*
- *performance reviews; and*
- *maintenance of personnel records.*

1.2 Approach and Methodology

Evergreen Solutions is uniquely qualified to provide On-Call Human Resources Consulting to Metro as our team includes recognized experts in local government human resources management and understands that there is not a "one size fits all" solution to human resources management. Our approach is built on working collaboratively with all parties to make sound, implementation-focused recommendations.



Evergreen Solutions will request that a Project Manager be designated by Metro to serve as our central point of contact. The Project Manager will have the most frequent interaction and involvement with our consultant team.

We will work closely with Metro's designated Project Manager (MPM) throughout the process to ensure clear communication of issues, concerns, and potential outcomes. Our consultants will work closely with Metro to gain a solid understanding of current operational realities, challenges, and desired outcomes. Moreover, we will work with Metro's Project Team to balance the need to meet performance goals while carefully managing the organization's resources.

Evergreen realizes that we need to tailor our approach to fit the operating, fiscal, and competitive needs of the organization. Our recommendations must always reflect competitive needs while supporting the organization's overall mission.

Listed below is an overview of the typical approach that Evergreen Solutions takes when providing On-Call Human Resources Consulting services being requested by Metro.

Kick Off Meeting

Our team begins each engagement by meeting with our client's leadership team. Frequently, this initial meeting will accomplish several goals, including:

- finalizing the project work plan;
- identifying milestone and deliverable dates;
- gaining insight into the organization and management structures and approaches;
- collecting necessary data;
- identifying additional data needs; and
- developing preliminary schedules for subsequent tasks.

Communication Plan

Communication is a critical component of any On-Call Human Resources Consulting services. By communicating with select employees directly and early in the process builds support for the process and the accompanying outcomes. As part of our communication plan, we meet first with key project staff to fully understand the nature and scope of the project. Regular updates will be provided to the client's Project Manager and can be posted on the client's intranet site, if desired. Additionally, a critical component of the communication plan is the distribution of the end product, particularly how the results will be distributed to employees, and is also very critical.

SWOT Analysis

The foundation of our approach is actually quite simple. We generally begin by conducting a strength, weakness, opportunity, and threat analysis (SWOT) of the operations and process for the type of On-Call Human Resources Consulting services being required by Metro and by examining the current policies, practices, and procedures that are used in each human resources discipline and then comparing them to



best practices. We analyze the gaps between current practices and best practices, and then articulate what it takes to transform the existing human resources services into a best practice operation. Our goal is to improve Metro’s performance and perception by drawing on what works and discarding what does not.

Study Type 1	Wage/Salary Ranges and Allocation, Create New or Update Existing Job Descriptions, and Salary Benchmarking
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Employee Orientation and Focus Groups

Along with the Kick-off Meeting for wage/salary ranges and allocation, job description, and/or salary benchmarking human resources services, we also request a copy of the employee database that reflects current classification, pay, and benefits data.

Based on client feedback and a review of best practices, we have designed an orientation curriculum that provides employees insight into the process as well as provides a forum for answering questions and soliciting participation. Following the orientation sessions, we begin the focus group process. Focus groups are used to gain detailed insight into employee perceptions, concerns, and issues. The protocol for the sessions is provided to your project team in advance and refined to meet your needs.

We have found that employee orientation sessions and focus groups are critical venues for building employee participation and gaining buy-in. Since these meetings take place at the outset of the project, they are a critical introduction to the project and the question and answer formats allow employees to become engaged in the process. During these sessions, Evergreen Solutions’ consultants can also help to manage expectations since some employees may have unrealistic expectations based on anecdotal information.

Department Head Interviews

Evergreen Solutions Team conducts one-on-one interviews with department heads and/or senior management (in addition to any other employees the client determines is necessary) to identify challenges for consideration. These interviews allow our staff to add details to our understanding of the organization and its needs. They also allow our consultants the opportunity to better understand the organizational structure of each department as well as the unique recruiting and retention issues that may be present in each department. Frequently, department directors and senior management serve as invaluable resources in explaining how internal equity relationships have evolved over time and explaining the nuances between the differences in jobs.

Job Assessment Tool and Management Issue Tool

An important activity undertaken for a pay and classification study is the distribution of Evergreen Solutions’ Job Assessment Tool© (JAT). These questionnaires are central components of the job evaluation process. The JAT asks a series of questions regarding an employee’s



job that captures the nature of the job and how it interacts with work within the organization.

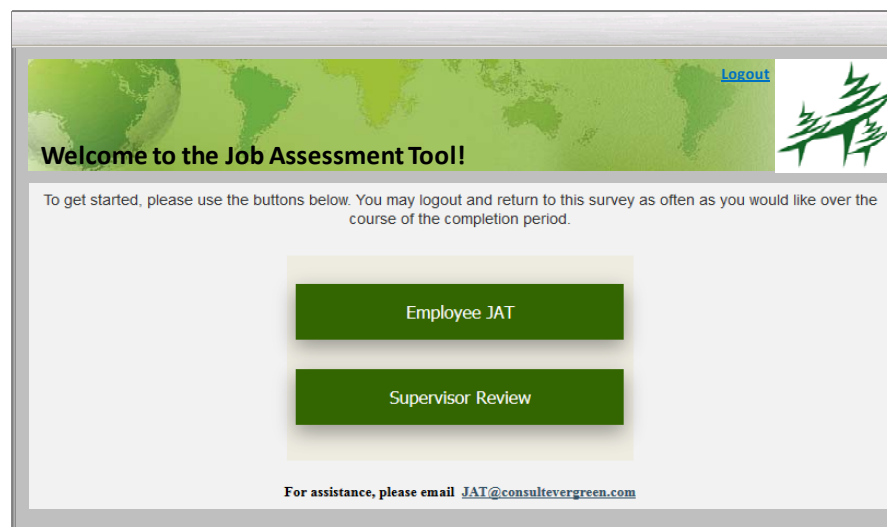
The JAT contains questions that ask about each of the following areas:

- scope of duties;
- complexity of work;
- supervision received and exercised;
- physical requirements;
- financial responsibilities;
- analytical/mental requirements;
- knowledge and skills required for the job; and
- level of responsibility/reporting relationships.

Evergreen Solutions contacts the client's Project Manager if there is a need to clarify question responses or issues with information collected from the JAT. Due to budgetary constraints faced by many of our clients, we have designed the JAT as a web-based tool so that data can be collected electronically. If requested, we can also provide a paper-based version of the tool.

Exhibit 1-1 below depicts a screenshot of the JAT home screen showing the levels of access for a Supervisor. Supervisors have access to their own surveys in addition to the ability to review and approve the surveys of their direct reports. The supervisor review process ensures validation of the JAT data collected from employees and prevents comments made by employees from being taken out of context.

Exhibit 1-1
Supervisor's JAT Home Screen



Source: Evergreen Solutions, 2019



Exhibit 1-2 illustrates how Evergreen Solutions uses the JAT to collect functional details of employee’s jobs. Seeking to understand how employees summarize their responsibilities in their own words allows our analysis to expand beyond what may be conveyed in a traditional job description. An informal survey of municipal employees revealed that 90 percent felt that the job descriptions held on file with their employers were inaccurate or incomplete representations of their duties. Understanding this, Evergreen Solutions designed the JAT to fill in those gaps to ensure that the entirety of an employee’s job is analyzed within the context of the study.

Exhibit 1-2 Job Description and Responsibilities

The screenshot shows a web form titled "Basic Job-Related Information" with a green header and a "Logout" link. The form is divided into several sections:

- Job Introduction:** A text area for a job description with a 2000-character limit.
- Type of Work:** A radio button selection for job levels: Clerical/Manual, Laborer/Trade-Based Occupations, Technical/Paraprofessional, Administrator, Managerial/Professional, and Executive/Advanced Professional.
- Education and Experience:** Two dropdown menus for "Education" and "Experience".
- Licenses and Certifications:** A text area for listing required licenses and certifications with a 255-character limit.

A green "SAVE" button is located at the bottom of the form.

Source: Evergreen Solutions, 2019



Exhibit 1-3 shows a similar page in which employees are asked to list the Essential Functions of their job. These are the tasks and activities that define the classification and make it unique. Gathering information such as this allows Evergreen Solutions to assess the validity of the present classification structure and identify classifications or individuals within classifications that need to be restructured or reclassified.

**Exhibit 1-3
Job Functions**

Essential Job Functions

Logout

On the lines provided, please include all essential job functions you perform. For every function you list, estimate the total percent of your time spent on each function on an annual basis and check off which tasks are a priority. A priority task is one that is core to your position.

Task	Input Field	Percent	Priority
Task 1	[Text Field]	[Input]	<input type="checkbox"/>
Task 2	[Text Field]	[Input]	<input type="checkbox"/>
Task 3	[Text Field]	[Input]	<input type="checkbox"/>
Task 4	[Text Field]	[Input]	<input type="checkbox"/>
Task 5	[Text Field]	[Input]	<input type="checkbox"/>
Task 6	[Text Field]	[Input]	<input type="checkbox"/>
Task 7	[Text Field]	[Input]	<input checked="" type="checkbox"/>
Task 8	[Text Field]	[Input]	<input checked="" type="checkbox"/>
Task 9	[Text Field]	[Input]	<input type="checkbox"/>
Task 10	[Text Field]	[Input]	<input type="checkbox"/>

Source: Evergreen Solutions, 2019

In addition to the JAT, Evergreen Solutions also distributes our Management Issues Tool (MIT). The MIT is distributed to supervisors and managers and is used to collect specific information from supervisors and managers related to such issues as recruitment and retention problems, classification issues, pay equity issues, problems with titles, and other related issues. Each MIT will be logged and a specific response will be provided. The MIT process is designed to allow supervisors and managers to give direct input into the process



	<p>and they serve as “red flags” to Evergreen Solutions staff during the analysis portion of the project.</p>
<p>Preliminary Assessment</p>	<p>As a starting point for analysis, Evergreen’s project consultants review the client’s database in comparison to the pay plan and information collected from the JATs to produce a preliminary assessment. The preliminary assessment summarizes the strengths and weaknesses of your human resource management system. The compensation analysis focuses on the number of pay grades, range widths, percentage differences between grades, step plans versus open range plans, and the expected time to reach full job competency. The overall analysis focuses on structure, movement, and equity (internal) as well as specific concerns such as turnover, longevity, compression, and range anomalies. The issues we identify in the assessment become core considerations in creating the potential solutions later in the process.</p>
<p>Job Evaluation</p>	<p>The next step in the classification process is to review responses to the JATs and identify any possible misclassifications. Once the review of the JATs has been completed, Evergreen Solutions’ consultants will evaluate all jobs on each of the compensatory factors, score each position, and determine if there is any need for further investigation of specific positions. If serious discrepancies exist, Evergreen Solutions’ consultants will work directly with the client’s Project Manager to resolve any issues.</p> <p>Once work has been properly classified, changes in the current classification system rankings can be recommended. Our goal is to produce a classification system that reflects the internal equity relationships suggested by the JAT scoring conducted earlier.</p>
<p>Market and Benefits Surveys</p>	<p>A key component of assessing compensation is to consider market position, which is sometimes referred to as external equity or competitiveness. The market survey is used to obtain standard range information related to minimum, midpoint, and maximum salaries. Data collection will focus on the public sector, but will include information from the private sector where applicable. Further, we will look to include any employers to whom the organization has recently lost employees.</p> <p>In addition, a benefits survey could be administered in tandem with the market survey. Special consideration can be given to select highly competitive, market-driven positions if necessary.</p>
<p>Benchmarks</p>	<p>One of the most important components of the external assessment is in the selection and utilization of benchmark positions for the labor market survey. We work with the client to identify the appropriate number of benchmark positions to best fit their needs in the labor market survey. Based on our experience, we have found that it is simply not practical to survey all positions within the organization– the resulting surveys become too cumbersome for labor market peers to complete, and the response rate on the whole suffers. We ensure,</p>



through multiple checks and balances, that the benchmark positions chosen will represent a broad spectrum of positions across the organization, from all job families, pay levels, and functional areas.

Targets

To conduct an external labor market assessment, we work with the organization to identify the most appropriate targets to survey. Evergreen Solutions selects peer organizations based on the local labor competition, regional markets, and class-specific markets. Peer organizations should be those organizations that compete with the client for labor in at least one job family. Peers in the public sectors will be included in the survey, and if necessary, augmented with published secondary data sources.

Typically, Evergreen Solutions waits until the outreach process has been completed to identify the complete list of market peers. This is because we often uncover specific information during the focus group and interview sessions that identifies potentially critical survey targets. Ideally, we would like to work with the client after the outreach has been concluded to identify the final list of potential market peers.

An important factor of our methodology is that the client has the final approval of all aspects of the study. We will not proceed with the analysis unless the client is completely comfortable with the survey targets chosen. Often, there are different factors impacting an organization, such as proximity to a major metropolitan area, technology corridor, or specific market (i.e., military base), that have a direct effect on its ability to recruit and retain employees in specific positions. These factors have to be taken into account when selecting survey targets. Once the targets are selected and approved, the survey instrument is developed and sent to the client for final approval. Subsequent to client approval, the survey is then distributed to the targets in both paper and electronic formats.

Evergreen Solutions uses a four-fold method of communicating with respondents. Our staff notifies the target group that the survey is being sent or made available, confirms receipt, and encourages participation. Once the data are received, they are cleaned, validated, and summarized. A separate report is issued that shows the results of the salary survey.

Unifying the Solution

After determining the appropriate division of work and market position, the compensation structure may be created. There is not a single, perfect solution for every client partner. The nuances and unique characteristics of each client necessitate a customized solution to best meet the organization's needs.

The Evergreen Solutions Team has considerable experience in developing multiple solutions and working with client partners to determine the one that best meets their needs. Our analytical team uses a variety of tools to produce various potential solutions: regression analysis, market thresholds, and other human resource models. Several major options are presented to the client's team before the implementation plan is created.



	<p>At this stage in the process we typically meet with the client to identify the direction of the final solution. A draft report is presented for review and comment. Typically our client is asked to examine the draft solution objectively and provide insights and recommendations on the direction of the report. When this process is completed, Evergreen Solutions' consultants may proceed with the final solution, which also contains information regarding fiscal impact and implementation.</p>
Study Type 2	Performance Appraisal Systems, Tools and Processes, and Performance Reviews
Performance Evaluation System	<p>Over time, the public sector has shown an increased awareness of the necessity of conducting regular performance reviews and evaluations and linking those reviews and evaluations to compensation management. The Evergreen Solutions team has worked with numerous public sector clients in developing and implementing performance evaluation systems as well as alternative reward strategies that incorporate the unique environment and circumstances of our client partners.</p>
Study Type 3	Customized Employee Training and Ongoing Management Training and Coaching
Conduct External and Internal Assessments	<p>Using the information gathered during the SWOT Analysis, the Evergreen Team analyzes, designs, and initiates a custom training program based on the specific needs and goals of the project. Expectations and objectives for employee training are established and a calendar for training activities may be created. Logistics for training sessions, working definitions, and reporting protocols are also established.</p>
Curriculum Development and Delivery	<p>With the goal of developing, submitting, and revising curricula for each course according to subject matter, training topics and course materials may be discussed and reviewed with the Metro Project Manager. Quantifiable performance measures can be identified and post-training testing materials are developed and provided to the Project Manager for review and approval. Once the MPM provides approval, delivery of the training system is coordinated.</p>
Study Type 4	Policy Development and Revision
Conceptual Data Collection	<p>Information assessed during the SWOT Analysis, is used by the Evergreen Team who meets with the Metro Project Manager, and any other designated staff, to discuss Metro's desired culture, definition of excellence, and future goals. Focus groups with Metro staff may be scheduled and conducted to discuss the current culture, roles, and responsibilities.</p>



	<p>A model of the roles, values, rewards, and structures that correspond with the strategic direction of Metro will be developed. An overview of this model will be provided to the Metro Project Manager.</p>
Peer Best Practice Survey	<p>Evergreen will work with Metro to determine the peer institutions for inclusion in a best practices survey, in addition to incorporating findings from our database of over 250 human resources best practices.</p>
Policy Analysis and Implementation	<p>A gap analysis of current practices against best practices will be conducted to determine alternatives that most closely align with Metro's direction and policy goals. A report summarizing the findings and recommendations for policy development and/or revision will be provided to Metro.</p>
Study Type 5	Assist with the Hiring Process (including Executive Positions)
Needs Assessment	<p>The Evergreen Solutions team will work with the Metro Project Manager and other necessary Metro staff to conduct a needs assessment. The goal of this assessment will be to determine the specifics for the position to be filled. A summary report of the needs assessment will be provided to the Metro Project Manager.</p>
Candidate Search and Interviews	<p>Based on approval from the MPM, Evergreen's consultants can begin the search for potential candidates to fill the position. Potential candidates' references will be checked and a final list of candidates will be presented to the MPM for review and approval. Based on the determination by the MPM, Evergreen can begin the candidate interview process.</p>
Hiring Manual	<p>If desired by Metro, a guide can be developed to outline recommendations and best practices for future hiring processes.</p>
Study Type 6	Maintenance of Personnel Records
System Maintenance	<p>Our goal is to produce recommendations that are effective and that can be maintained by our clients. We are strongly committed to providing transparent and replicable solutions. In essence, when we complete our core assignment, our goal is that our client's staff can maintain and update the system on their own. We are readily available to provide assistance, but our goal is to give our clients all the tools and training that are needed. Towards this end we will provide the Human Resources Department with all necessary tools and training to maintain the system(s) over time.</p>



For example, based on client needs and industry best practices, Evergreen Solutions has developed a compensation and classification maintenance tool to assist our clients with implementing, managing, and updating the solutions: **JobForce Manager**. This tool allows our clients to estimate future pay plan changes, update market information, make determinations on reclassifications, and create new jobs. By automating these tasks, *JobForce Manager* allows our clients to not only streamline, but also increase the fairness and transparency of regular compensation and classifications tasks after solution implementation.

Exhibit 1-4 displays the interface from **JobForce Manager** for determining a position's pay grade; additional features include a job scoring tabulation sheet, market survey results database and summary report, pay plan report, and employee salary calculators for modeling fiscal impacts of compensation changes at the employee level. All data and reports are downloadable and printable, so they can be provided to key decision makers.

Exhibit 1-4
JobForce Manager Tool

Pay Plans	Scoring/Grading	Compensation	Market		
Download Data Grid Edit					
CURRENT TITLE ▲	PAY PLAN	JAT SCORE	REGRESSION MIDPOINT	MARKET MIDPOINT	POSITION MIDPOINT (SELECT)
Accounting Specialist II	ESP	212.5	\$30,100.27	\$31,220.80	\$31,508.69
Accounting Specialist III	ESP	251.3	\$39,058.27	\$34,379.43	\$40,213.96
Accounting Specialist IV	ESP	306.3	\$42,315.73	\$40,166.80	\$44,335.90
Accounting Supervisor	ESP	500.0	\$67,561.02	\$69,350.91	\$68,779.53
Acquisition Specialist	ESP	306.3	\$42,315.73	\$41,595.60	\$44,335.90
Administrative Aide	ESP	312.5	\$43,130.09	\$36,624.74	\$44,335.90
Administrative Recording Secretary	Professional	381.3	\$52,088.10	\$40,994.30	\$58,245.16
Administrative School Secretary I	ESP	206.3	\$29,295.91	\$31,619.17	\$33,084.13
Administrative School Secretary II	ESP	231.3	\$32,543.36	\$35,996.59	\$34,738.33
Administrative School Secretary III	ESP	256.3	\$35,800.82	\$37,701.80	\$38,299.01
Administrative Secretary I	ESP	231.3	\$32,543.36	\$32,190.02	\$33,084.13
Administrative Secretary I	ESP	306.3	\$39,388.91	\$33,190.02	\$33,084.13
Administrative Secretary II	ESP	231.3	\$32,543.36	\$33,919.04	\$34,738.33
Administrative Secretary II	ESP	231.3	\$32,543.36	\$33,919.04	\$34,738.33
Administrative Secretary III	ESP	256.3	\$35,800.82	\$35,971.01	\$38,299.01
Administrative Specialist	Professional	231.3	\$32,543.36	\$43,762.63	\$35,422.62
Administrative Specialist-ocnookFood Services	Professional	279.0	\$38,243.91	\$42,961.08	\$40,626.61



Section 2.0:
Experience and Qualifications



2.0 Experience and Qualifications

In this section we include a list of similar projects that Evergreen Solutions has worked with, or is currently on contract to work with, focusing on transit authorities, but also including other public sector clients; three references for which Evergreen has provided related services, and biographies of project team members.

2.1 Related Experience

Salary Study

Davidson Transit Organization, Tennessee

Evergreen Solutions was hired by the Davidson Transit Organization (DTO) in Nashville to provide an in-depth analysis of its compensation plan including an evaluation of market competitiveness and compensation structure applicable to administrative exempt and non-exempt staff (120 positions). This study included a review of current compensation practices and the development of a compensation philosophy, defining the appropriate labor market to which DTO should be compared, evaluating the FLSA status of each position, making salary recommendations for various jobs based on market data collected, completing an assessment of total compensation, and the provision of recommendations to assist with implementation.



Compensation Salary Study Review

Davidson Transit Organization, Tennessee

Evergreen Solutions was again hired by the Davidson Transit Organization (DTO) in Nashville to provide a Compensation Salary Study Review by performing the following tasks: reviewing of DTO's current structure to ensure that it still met DTO's needs; conducting a targeted salary survey of those positions that had most adversely been impacted by market changes since the last study was conducted by Evergreen in 2010; scoring and placing new positions that had been added since the last study was conducted; and reviewing FLSA status for positions based on any task, duty, or responsibility changes.



Compensation Consultant Services

Dallas Area Rapid Transit (DART), Texas

Evergreen Solutions is retained by Dallas Area Rapid Transit (DART) to provide Compensation Consultant Services. DART is a public transportation agency providing an assortment of transportation services to thirteen (13) cities in the Dallas, Texas metroplex.



Evergreen will provide job evaluation information questionnaires and electronically create job descriptions or classifications from the provided information. Evergreen will update information into DART's job description database system, and submit the updated job descriptions through its online workflow system. Evergreen will review, determine, and recommend revised rules, policies, and procedures in anticipation of and based on the proposed rule change regarding overtime compensation and will review all job descriptions and determine exempt or non-exempt status based on FLSA guidelines. Evergreen will also review and validate DART's career ladder program and make recommendations for any necessary modifications.

Upon approval of the job description review and update, Evergreen will make recommendations for a sustainable compensation system that will ensure recruitment and retention of a quality public sector transit workforce, based on compensation benchmarking with comparable mid-sized employers, and comparable mid-sized transit agencies in the Texas, Southern region, and national markets.



**Job Evaluation and Wage Survey Analysis
Fort Wayne-Allen County Airport Authority, Indiana**

Evergreen Solutions was on contract with the Fort Wayne-Allen County Airport Authority to conduct a Job Evaluation and Wage Survey Analysis and provide recommendations for implementation of a revised plan. This analysis included a review of the existing job classifications and pay plan. As part of the analysis, Evergreen Solutions conducted a project orientation to management and employees which included focus groups and interviews, administered the Job Assessment Tool, and completed a comprehensive salary survey of local and regional employees to assess the market competitiveness of the Authority. The outcome of the analysis was a final report detailing recommended classification and pay plan revisions.



**Salary and Benefits Study
City of Bloomington/Bloomington Transit, Indiana**

Evergreen Solutions was retained by the City of Bloomington to conduct a Salary and Benefits Study. Evergreen examined the wages and benefits of the City's employees (including transit) as compared to public and private sector entities in Indiana and surrounding areas to determine whether the Transit wages and benefits are competitive in the market.



**Classification and Compensation Study
Central Ohio Transit Authority**

Evergreen Solutions was retained by the Central Ohio Transit Authority (COTA) to conduct a Compensation and Classification Study for its administrative, non-represented employees (i.e., 155 employees in 94 different positions). Evergreen validated that COTA's compensation package: ensured that positions performing similar work with essentially the same level of complexity, responsibility, and knowledge, skills and abilities were classified together; provided salaries commensurate with assigned duties; provided justifiable pay differential between individual classes; provided competitive compensation that is comparable to other transits, and public and private sector employers within their service and recruitment area; and provided base compensation within the labor market.

Evergreen provided recommendations for the appropriate salary range for each existing or proposed classification based on the compensation survey results, internal relationships, and equity and provided revised class specifications. In addition, Evergreen proposed a new system for assessing the established pay structure on an annual basis that measured the change in market rates and the method for adjusting minimum and maximums of the pay bands as well as for assigning salary grades to newly created classes or classes with significant changes in duties and responsibilities that took into account the market value of the class in addition to the responsibilities and qualifications. Evergreen also proposed a performance appraisal process and form that supported the new compensation strategy and ensured the alignment with corporate goals and objectives. Recommendations were made for a process that will ensure the longevity of the compensation structure into the future.



**Compensation Plan Update
Central Ohio Transit Authority**

Evergreen was again hired by the Central Ohio Transit Authority in 2016 to analyze the competitiveness of its current compensation plan. Evergreen reviewed current conditions; conducted a market salary survey; provided compensation structure recommendations; and prepared and presented a final report.



**Classification and Compensation Study
Sarasota-Manatee Airport Authority, Florida**

Evergreen Solutions was retained by Sarasota Manatee Airport Authority to conduct a detailed compensation and classification analysis of its workforce. Evergreen staff conducted job analysis to determine the best



classifications for the work performed and analyzed pay ranges in the public and private sector to determine the appropriate pay levels for all included jobs. Recommendations were provided to improve the fairness and equity.



**Classification and Compensation Study
Hillsborough Area Transportation Authority, Florida**

The Hillsborough Area Transit Authority selected Evergreen to conduct a comprehensive Compensation and Classification Study. The study was designed to progress through a series of tasks aimed at summarizing and defining the current classification and compensation system in place at the Authority; assess the equity of the system to ensure that, internally, the Authority was homogeneously compensating positions for the level of work actually performed; and systematically assess the ability of those systems to compete with the external labor market.

Evergreen worked closely with Authority leaders to evaluate, from the ground up, the current environment of the compensation and classification system in place. This included assessing the system from multiple angles to identify areas of possible compression, stagnation, and overall systematic weakness. From this point, Evergreen worked with the Authority to define a final total compensation and classification philosophy. Together, completion of these tasks allowed for clear identification of where the Authority was and where they wanted to be; ultimately allowing Evergreen to provide recommendations on steps to close the gap.

The second phase of the study involved an external analysis of the surrounding labor market's compensation levels. Using a survey approach, Evergreen determined market compensation levels for positions within the Authority by contacting multiple market peers. This analysis, in conjunction with results from the internal analysis, allowed Evergreen to provide recommendations on how the Authority could best structure their compensation and classification systems to remain competitive with the external labor market.



**Classification and Compensation Study
Orlando-Orange County Expressway Authority, Florida**

The Orlando - Orange County Expressway Authority (OOCEA) has retained Evergreen Solutions to conduct a comprehensive compensation and classification study to determine whether the OOCEA possessed a compensation and classification system that was both equitable as compared to the external competitive employment market as well as equitable internally. The study included a complete classification analysis using the Job Assessment Tool job valuation



Other Projects

methodology as well as a statistical assessment of internal conditions and an assessment of external equity including a salary survey of competing organizations. The report culminated with a series of findings and recommendations that were designed to alleviate any strains on the system and, if necessary, redesign or augment the existing system in place at the OOCEA.

Note: Evergreen has worked with numerous local governments that included transportation-related positions within the study.

Development Of A Merit Based Performance Appraisal System City of Columbia, Missouri

The City of Columbia, Missouri retained Evergreen Solutions to assist with a comprehensive review of its performance management system. Based on data collected through focus groups, employee surveys, interviews, and best practices, a new performance management system was developed. The system combined each level of the organization including the individual, department, and organizational levels.



Comprehensive Management Review and Strategic Planning City of Fountain, Colorado

As part of an ongoing effort to improve the efficiency and effectiveness of its operations and management, the City of Fountain, Colorado, a growing city near Colorado Springs, hired Evergreen Solutions to conduct a comprehensive management and performance review of its operations.

In Phase I, Evergreen Solutions consultants conducted a thorough diagnostic review of the Fountain's structure, management, and organizational issues. Chief among those was the tremendous growth the City had experienced since the late '90s. This growth led to a strain on limited resources within the City and a need to identify strategic priorities for the future.

In Phase II of the study, the Evergreen Solutions team conducted an in-depth analysis of the city's overall organizational structure, financial operations, human resources management, public safety operations, public works, and utilities management. The overriding goal of the study was to assist the city in determining where resources needed to be directed to accomplish its goals, where resources were being utilized inefficiently, and the best approach to realign resources to sustain positive community development.

In 2008, the City of Fountain again engaged Evergreen Solutions to facilitate the development of the City's comprehensive strategic plan. In the context of the plan development, the following major tasks were completed over a six-month period:



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- Internal, External, and Market Analysis;
 - Mission, Vision, and Strategic Priorities;
 - Administrative Goals and Objectives; and
 - Budget Linkage Plan.

Evergreen Solutions was responsible for conducting a community-wide outreach program to solicit input, identifying the City's major strengths and weaknesses as well as core values, and developing a comprehensive plan to address five-year goals and objectives to guide the City and its development.



Performance Management Review Morehead State University, Kentucky

Evergreen Solutions was retained by Morehead State University to assist with the development of a new non-faculty performance management system. Evergreen staff conducted interviews, focus groups, and a staff survey to determine perceptions toward current tools and future needs. A new process and form was recommended to the Performance Committee and adopted for school use.



Classification and Compensation Study Marshall County Personnel Board, Alabama

Evergreen Solutions is retained by the Marshall County Personnel Board to conduct a Classification and Compensation Study for approximately 183 employees who fall under the auspices of the Personnel Board. In order to competitively recruit and retain employees, motivate employees to excel in job performance, and structure work to provide the best service to the community, Evergreen Solutions will collect, review, and evaluate current compensation and classification data for the County. Evergreen will also work with the County to identify benchmarks and targets for the market survey and provide strategic positioning recommendations. A final report, to include the costs associated with all recommendations and an implementation strategy will be provided to the County. **In addition, Evergreen Solutions will review the County's current performance evaluation system and develop a new tool for each major job group.**



Human Resource Policy Review Atlanta Public Schools, Georgia

The Atlanta Public Schools contracted with Evergreen Solutions to conduct a review of specific human resources policies within the school system. The policy review was confined to two specific policies—the policy governing the hiring of personnel and crediting for years of service by hiring into the range of the position; and the policy governing the promotion of staff and the upward grade and range movement awarded to employees within the school system upon promotion. In conducting this study for the school system, Evergreen Solutions was tasked with the following:

- analyzing the current hiring and promotion policies in place within APS as they relate to both certified staff (teachers and instructional personnel) and non-certified staff (administrative and classified personnel);
- obtaining anecdotal data on the strengths and weaknesses of the current policies from both human resources staff and employees within the school system;
- determining the market competitive position of these policies with larger districts within the Metropolitan Regional Education Service Agency;
- determining the competitiveness of these policies as compared to large, progressive, urban school systems throughout the United States;
- identifying a fair, practical, and fiscally responsible solution for the school system to amend their current hiring and promotion policies; and
- providing specific implementation recommendations for both the hiring and promotion policies within the Atlanta Public Schools.



Performance Improvement Training City of Destin, Florida

The City of Destin retained Evergreen Solutions to work with their performance improvement teams on customer service, employee relations, budget/finance, and communications. Each team was trained on issue resolution methodology, assisted with forming a work plan, and guided through the improvement recommendation process.



**Training on "How To Conduct an Environmental Scan"
City of Destin, Florida**

The City of Destin engaged Evergreen Solutions to facilitate the following in January 2009:

- Environmental Scanning overview presentation to all employees;
- Environmental Scanning training for senior leadership; and
- Discussion and wrap up session with the Quality Steering Committee to discuss perceptions of the Environmental Scanning training and the plan for the upcoming Vision Session.

A follow up Strategic Planning Session for Council Members was provided in May 2009.



**Supervisory Training Course – Doing More With Less
City of Tallahassee, Florida**

Evergreen Solutions provided Level 2 training for city supervisors and managers on the subject of “Doing More With Less.” The subject matter included discussions of efficiency, effectiveness, and productivity.



**Employee Training Course – Emotional Intelligence
City of Tallahassee, Florida**

Evergreen Solutions provided training on Emotional Intelligence. The course provided defined emotional intelligence, examined the history behind the study of this behavioral science, and provided practical tools for participants to recognize and work with emotional intelligence.



**Employee Training Course – Goal Setting
City of Tallahassee, Florida**

Evergreen Solutions was contracted to provide training to City of Tallahassee employees on the topic of goal setting. This contract was an add-on to initial training that Evergreen Solutions provided earlier in the year. The course material included discussions and tools pertaining to personal goal setting as well as business process goal setting. The objective was to provide course participants with skill sets that will also be beneficial for strategic plan development.



Performance Management System and Train the Trainer Delivery System
Seminole County, Florida

Seminole County hired Evergreen Solutions for a county-wide Performance Management System Review which involved a review and update of the current system. Our staff reviewed alternative compensation methods, assessed the appropriateness of the County's existing system, developed a new performance management system, and implemented a train the trainer system for delivery. The impact of the Evergreen Solutions' studies appeared in an article in an ICMA publication.



Workforce Strategic Plan
Florida Department of Management Services

The Florida Department of Management Services hired Evergreen Solutions to create a statewide workforce strategic plan. The plan included sections on workforce design, compensation, and development. Surveys, interviews, focus groups, and trend analysis were utilized to collect data from all state agencies and produce an action driven document to guide the state for the next five years.



Human Resources Best Practice Study
Florida Department of Management Services

The Florida Department of Management Services (DMS) retained Evergreen Solutions to conduct a Best Practices Review of its internal human resources operation. A multi-faceted, multi-level approach was utilized that included focus groups, interviews, peer review, process analysis, best practices, benchmarking, and gap analysis.

Evergreen Solutions' consultants reviewed the Department's compensation, classification, and performance management systems. In addition, our consultant team evaluated the traditional broadbanding system. Based on data from each of these tools, a variety of operational recommendations were made.



**Performance-Based Compensation Study, Pay and Classification Review, Organizational Consulting, and Strategic Planning
Health Care District of Palm Beach County, Florida**

Evergreen Solutions worked with the Health Care District of Palm Beach County (HCDPBC) conducting numerous human resources, organizational, and management studies for more than three years. The HCDPBC initially hired Evergreen Solutions to create and assist with the implementation of a new classification and compensation system. As the study concluded, the leadership realized the value in reviewing their pay-for-performance system. Wanting to utilize the momentum developed, the HCDPBC turned to Evergreen Solutions to overhaul the way in which staff was currently evaluated, and the possible changes in culture that may be a “side effect” of a new performance-based compensation system. Evergreen Solutions helped by presenting information about the necessity of conducting regular performance evaluations and linking these evaluations to compensation management. To complete the engagement, Evergreen Solutions Consultants conducted a full internal assessment, reviewed best practices, and created a performance management system that included flow charts for communicating the process and organization-specific tools and materials. Finally, consultant team members assisted with the transition and implementation by training employees, managers, and human resources staff on the most effective utilization of the system.

Another engagement Evergreen Solutions conducted with the HCDPBC—from 2007—involved reviewing and making recommendations on how its organizational structure might be enhanced to better meet the needs of the organization and its customers. Specifically, the Evergreen Solutions Team was asked to answer two core questions:

1. What is the best structure for HCDPBC to use as it grows?
2. What responsibilities should a newly approved executive position be assigned?

Working with HCDPBC staff, the Evergreen Solutions Team reviewed the strengths and weaknesses of the current structure, interviewed the executive staff, conducted several internal surveys, and examined best practices in other health systems. Overall, the study revealed that the HCDPBC is struggling with “growing pains” typical for an organization that has undergone rapid change over a short period of time. The Evergreen Solutions Team made 10 specific recommendations to improve the District's structure and strengthen the organization.

In 2008, Evergreen Solutions assisted with the District's strategic planning effort. The Evergreen Solutions Team reviewed environmental scan information, facilitated several sessions to develop organizational values, and analyzed linkages with goals and desired outcomes. To further realize the gains of the planning effort, the primary components of the plan were utilized to develop a performance management approach for District employees and managers.



2.2 References

Davidson Transit Authority, Tennessee
Salary Study / Compensation Salary Study Review
Contact Information: Kent Minich, Human Resources Manager
430 Myatt Drive, Nashville, Tennessee 37115
(615) 862-5969; kent.minich@nashville.gov



Dallas Area Rapid Transit, Texas
Compensation Consulting Services
Contact Information: Tina Franco, AVP HCIS and Compensation
1401 Pacific Avenue, Dallas, Texas, 75202
(214) 749-3335; tfranco@dart.org



City of Bloomington/Bloomington Transit, Indiana
Compensation & Benefits Study
Contact Information: Lew May, Manager of Bloomington Transit
130 W. Grimes Lane, Bloomington, IN 47403
(812) 332-5688; mayl@bloomingtontransit.com



2.3 Evergreen's Project Team

Dr. Linda Recio

The following paragraphs provide summaries of Evergreen consultants qualifications and experience. Detailed resumes are available upon request.

Dr. Linda Recio is the President of Evergreen Solutions, and has over 30 years of experience in public education as a classroom teacher, teacher educator, school district administrator, director of state educational programs, and consultant. Dr. Recio has directed multiple education projects in California, Washington, Oklahoma, Texas, North Carolina, Massachusetts, Georgia, Virginia, Florida, South Carolina, Pennsylvania, Ohio, and several other states.

Early in her career, after serving as a middle school teacher, Dr. Recio worked as a consultant with the Florida Department of Education. While at the Department of Education, she was instrumental in developing the comprehensive audit criteria and data collection instruments utilized for conducting operational and management reviews in Florida's 67 school districts. Following the development of the audit criteria, she served as team leader for audits that involved examining and evaluating procedures, records, and programs to determine compliance with federal, state, and local rules and regulations; providing assistance to the district administration in correcting deficiencies; and assisting school districts in



operating efficiently and effectively. She conducted audits in Florida's 67 school districts including audits of Florida's large school districts of Miami-Dade, Broward, Duval and Palm Beach County.

Following a 14-year career with the Department of Education, Dr. Recio joined the Leon County School System as an Assistant Superintendent where she was responsible for the district's strategic plan, school board policies and administrative procedures, staff plan, interagency and legislative planning, grants administration, and program evaluation.

For 15 years Dr. Recio was in charge of K-12 education, strategic planning, and marketing as a Senior Partner with MGT of America, a national consulting firm.

Dr. Recio is the primary author of the Evergreen Solutions Procedures for Conducting Management and Performance Audits of School Districts, as well as Evergreen's Best Practices School District Manual. In addition, she has developed school district performance audit guidelines manuals for several states including the state of Washington, where Evergreen Solutions conducted performance reviews of the 10 largest school districts in the state. Her consulting experience includes the areas of management and operational audits, program evaluation, survey research, school improvement planning, educational planning, professional development, strategic planning, instructional design, and educational funding.

Dr. Ling holds a Doctorate's Degree from Florida State University in Science Education.



Dr. Jeffrey Ling, CCP

Dr. Ling is Executive Vice-President of Evergreen Solutions. He has over 20 years consulting experience in the following areas: human resources; performance improvement; process analysis; strategic planning; statistical analysis; research methodology; data management; surveys and polling; technology analysis; change management; and risk analysis.

He has planned, organized, and managed studies on human resources assessment, survey analysis, government efficiency, technology planning, information utilization, public opinion, market expansion, and privatization. Each of these studies dealt with summarizing major alternatives for decision makers and providing viable recommendations. He has consulting experience in higher education, state and local government evaluation, research management, efficiency analysis, survey analysis, statistical modeling, and technology planning.

With a multitude of clients on hundreds of engagements across the nation, Dr. Ling has worked in the capacity of Project Principal and Director and his work includes state and local governments, school districts, institutions of higher education, quasi-governmental agencies, and private industry entities.



He has been instrumental in creating, reviewing, and evaluating the methodology employed by Evergreen Solutions on a number of engagements. His background and skill set make him uniquely qualified for assessing organizational critical needs and strategy. He is an expert in policy development and long-term planning.

A sample of the types of studies he has been involved with include:

- Management and Process Review
- Strategic Planning
- Compensation/Classification
- Market Research
- Policy Development
- Performance Evaluation
- Gender/Race Audit
- Change Management Studies
- Employee Training

Dr. Ling holds a Doctorate's Degree from Florida State University in Political Science. He has taught courses addressing research methodology, statistical analysis, technological innovations, and political economy at various universities.



Nancy Berkley

Ms. Berkley is a Manager at Evergreen Solutions who has over 30 years human resources experience demonstrating a thorough knowledge of multiple HR disciplines including, recruiting and staffing, workforce planning and retention, on-boarding, compensation and benefits, employee and labor relations, employee leave administration, voluntary and in-voluntary employee separations, performance management, employee surveys, organizational design and development, organization effectiveness, employee learning, training, and development, employee records administration and retention, and awards and recognition programs. She has consistently enhanced organizational capability by integrating HR with strategic business planning, development and assessment. She has provided individualized executive coaching and led HR team development and high performance teams. She has led corporate change initiatives and built talent-rich organizations by strengthening people and integrating processes and has directed human resources in high-volume, transactional service organizations and high-level, consulting organizations. She has excellent conflict resolution, negotiation, and influencing skills.

Recent projects that Ms. Berkley has directed or served on the Evergreen Team include: Sedgwick County, KS; Jefferson County, MO; Morehead State University, KY; Blount County, TN; City of Conroe, TX; City of Farmers Branch, TX; City of Rowlett, TX; City of Pflugerville, TX; Brazoria County, TX; City of Page, AZ; Central Ohio Transit Authority; City of Annapolis, MD; City of Hagerstown, MD; City of Westminster, MD;



Washington County, MD; Boston Public Health Commission, MA; City of Williamsburg, VA; Gloucester County, VA; Essex County, VA; Guilford County, NC; Gaston County, NC; Buncombe County, NC; Chapel Hill-Carrboro City Schools, NC; Transylvania County, NC; City of Columbia, SC; City of Goose Creek, SC; Berkeley County, SC; City of Alpharetta, GA; City of Douglasville, GA; City of Savannah, GA; City of Brookhaven, GA; City of Commerce, GA; City of Villa Rica, GA; City of Woodstock, GA; City of Stockbridge, GA; City of Dalton, GA; City of Garden City, GA; Cherokee County, GA; Worth County, GA; Douglas County, GA; Lee County Commission, AL; City of Destin, FL; City of Fort Walton Beach, FL; City of Panama City, FL; City of Panama City Beach, FL; Lake County, FL; Martin County, FL; Highlands County, FL; and many more.

Ms. Berkley has a Bachelor's Degree in Psychology from Florida State University.



Tameka Richardson

Ms. Richardson is a Senior Analyst at Evergreen Solutions. She has over 15 years of experience providing services to federal, state and local governments and the private sector in performing accounting and procurement comparative analyses. Her experience includes research, auditing, statistical analyses of an organization's accounting and purchasing data and procurement procedures, data collection and assessment. As a result of her extensive work in the area of research and data collection, she is proficient in the preparation of statistical reporting and in the analysis and interpretation of large data sets for various organizations.

Recent projects that Ms. Richardson has been involved with include: Sedgwick County, KS; Clay County, MO; Liberty Public School District No. 53, MO; Ouray County, CO; City of Farmers Branch, TX; City of Amarillo, TX; City of Hobbs, NM; City of Reno, NV; City of Bloomington, IN; City of Annapolis, MD; Ulster County, NY; City of Covington, VA; County of Northampton, VA; Surry County and Surry County Social Services, VA; City of Suffolk, VA; New Hanover County and New Hanover ABC Board, NC; Charlotte Water, NC; City of Lancaster, SC; City of Goose Creek, SC; City of Conway, SC; Dorchester County, SC; Spartanburg County, SC; City of Alpharetta, GA; Baldwin County, AL; City of Dunedin, FL; City of Coral Springs, FL; City of Palm Beach Gardens, FL; City of West Melbourne, FL; City of Destin, FL; Martin County, FL; Gulf County, FL; Monroe County, FL; Alachua County, FL; and many more.

Ms. Richardson has an MBA and a Bachelor's Degree in Accounting.



Michael Misrahi

Mr. Misrahi is a Senior Consultant at Evergreen Solutions. He possesses an academic background in labor relations studies, which is coupled with professional experience analyzing qualitative data. His qualitative and quantitative skills are applied at Evergreen with regard to various analyses of human resources.

Mr. Misrahi's recent projects include: Metropolitan Community College, MO; Ouray County, CO; Central Community College, NE; Shawnee Community College, IL; Davidson Transit Organization, TN; Dallas Area Rapid Transit, TX; City of Mont Belvieu, TX; City of Pflugerville, TX; City of Seguin, TX; City of Fredericksburg, TX; City of Rowlett, TX; Santa Fe Community College, NM; the County of Montgomery, PA; Kent County Levy Court, DE; SUNY Ulster, NY; County of York, VA; Loudoun County, VA; City of Raleigh, NC; North Carolina League of Municipalities; City of Douglasville, GA; City of Fayetteville, GA; City of Dunedin, FL; Hernando County, FL; Santa Rosa County, FL; Miami-Dade County, FL; Osceola County, FL; Gulf County, FL; Sarasota County, FL; and many more.

Mr. Misrahi has an MBA and a Bachelor's Degree in History from Florida State University.



Lee Bouchelle

Mr. Bouchelle is a Senior Consultant at Evergreen Solutions. He has a strong background in Applied Labor Economics and quantitative analysis, which provides him with the ability to provide knowledge on a variety of public sector Human Resource studies. His research and data analysis skills at Evergreen have focused on human resource analysis, such as studying the internal equity of employee compensation and classification for public sector clients as well as comparing client practices to peers in the labor market. He is proficient in a variety of qualitative and quantitative tools necessary to complete the studies.

Prior to joining Evergreen Solutions, Mr. Bouchelle was a Consultant at ERS Group, where he was involved in the development of large and complex economic and statistical research projects which analyzed the effects of various business practices or economic programs. He also participated in data analytics projects that sought to identify fraud, waste, and abuse in the healthcare industry and state income tax filings. In addition, he prepared OFCCP compliant Affirmative Action Plans, evaluated AAP software for statistical accuracy, and estimated economic damages from various events.

Recent projects for Evergreen in which Mr. Bouchelle has been involved include: Jefferson County, MO; Clay County, MO; Blount County, TN; City of Farmers Branch, TX; Barton Springs Edwards Aquifer Conservation District, TX; City of Hobbs, NM; City of Page, AZ; Ogden City School District, UT; City of Reno, NV; Central Ohio Transit Authority; City of Annapolis, MD; Washington County, MD; Ulster County, NY; City of Williamsburg, VA; City of Fredericksburg, VA; County of Northampton, VA; City of Suffolk, VA; Gaston County, NC; Charlotte Water, NC; City of



Lancaster, SC; City of Conway, SC; Berkeley County, SC; Dorchester County, SC; Spartanburg County, SC; City of Alpharetta, GA; City of Chamblee, GA; City of Garden City, GA; City of Savannah, GA; Forsyth County, GA; Douglas County, GA; Lumpkin County, GA; Baldwin County, AL; City of Destin, FL; City of Delray Beach, FL; City of High Springs, FL; City of West Melbourne, FL; Monroe County, FL; Flagler County, FL; Alachua County, FL; and many more.

Mr. Bouchelle has a Master's Degree in Resource Economics and a Bachelor's Degree in Political Science/International Relations both from the University of Florida.



Queenell Fox, SHRM-SCP, IPMA-SCP, SPHR

Ms. Fox is a Manager with Evergreen. She is an executive human resources professional with a proven track record of success in achieving organizational objectives by utilizing strategic HR initiatives to meet organizational needs. She has demonstrated strong communications, interpersonal relations, coaching, counseling and conflict resolution skills and a thorough knowledge of employment laws, regulations and HR best practices. Her expertise falls into the following HR areas: organizational development and change; classification and compensation; employee relations; recruitment and retention; benefits administration/negotiations; union/civil service and labor relations; policy creation/implementation; succession planning; training and professional development; performance management; budget administration; and HRIS management and leadership.

Recent projects that Ms. Fox has directed or served on the Evergreen Team include: Clay County, MO; City of Gonzales, TX; Barton Springs/Edwards Aquifer Conservation District, TX; City of Hobbs, NM; City of Reno, NV; Mahoning County, OH; Ulster County, NY; Greenville County and Greenville County Water and Sewer Authority, VA; Surry County and Surry County Social Services, VA; County of Northampton, VA; City of Suffolk, VA; Charlotte Water, NC; Dorchester County, SC; City of Conway, SC; City of Lancaster, SC; Greenville Water, SC; Spartanburg County, SC; City of Alpharetta, GA; City of Pensacola, FL; the City of High Springs, FL; City of West Melbourne, FL; City of Holly Hill, FL; City of Dania Beach, FL; City of Orange City, FL; City of Kissimmee, FL; Monroe County, FL; and many more.

Ms. Fox has a Bachelor's Degree in Human Resource Management and MBA coursework from Columbia University. She is a certified Senior Professional in Human Resources (SPHR), Senior Certified Professional with the Society for Human Resources Management (SHRM-SCP) and as a Senior Certified Professional with the International Public Management Association (IPMA-SCP).



Mark Holcombe

Mr. Mark Holcombe is a Senior Analyst at Evergreen Solutions. He has spent extensive time studying both micro and macro-economic labor markets, public sector economics, and has studied econometric modeling for displaying and communicating data in an effective way. He has been using his economics background both in running a business and in consulting since graduation.

Recent projects that Mr. Holcombe has been involved with include: Metropolitan Community College, MO; Central Community College, NE; Shawnee Community College, IL; Dallas Area Rapid Transit, TX; Midwestern State University, TX; Tarrant County College District, TX; Sam Houston State University, TX; Santa Fe Community College, NM; Maricopa County Community College District, AZ; Washtenaw Community College, MI; County of Montgomery, PA; Loudoun County, VA; City of Raleigh, NC; North Carolina League of Municipalities; Dorchester County, SC; City of Fayetteville, GA; City of Pensacola, FL; Palm Beach County, FL; Brevard County, FL; Pinellas County, FL; Office of State Courts Administration, FL; and many more.

Mr. Holcombe holds a Bachelor Degree in Economics with a concentration in Behavioral Economics and Criminology from Florida State University.



Bradley Brackins

Mr. Brackins is a Consultant at Evergreen Solutions. With his background in data analysis and public administration, he assists public organizations in navigating the unique human resources challenges that they face today.

His experience at Evergreen Solutions includes conducting compensation and classification studies. He works closely with organizations to gather employee feedback and organizational data in order to evaluate their current situation. He also conducts market studies in order to evaluate competitiveness with peer organizations. Through his research and analytical skills, he is able to use this information to formulate customized solutions that help public sector clients improve their ability to recruit and retain high-quality employees.

Recent projects that Mr. Brackins has been involved with include: Jefferson County, MO; Jackson County, MO; Springfield R-12 School District, MO; Blount County, TN; City of Lakeway, TX; Wayside School District, TX; City of Carlsbad, NM; Spokane County, WA; City of Westminster, MD; Jefferson Community College, NY; Orange County Community College, NY; SUNY Erie Community College, NY; City of Covington, VA; Stafford County Public Schools, VA; Goochland County School Board, VA; Chesapeake Public Schools, VA; Buncombe County, NC; Union County, NC; Horry County Government, SC; North Charleston Sewer District, SC; City of Fayetteville, GA; City of Dunwoody, GA; City of Dublin, GA; City of Stockbridge, GA; City of Villa Rica, GA; Cherokee County, GA; Douglasville-Douglas County Water and Sewer Authority, GA;



City of Foley, AL; City of Panama City Beach, FL; City of Jacksonville, FL; City of Alachua, FL; City of Parkland, FL; Town of Lake Park, FL; and many more.

Mr. Brackins has a Master's Degree in Public Administration from Florida State University and Bachelor of Art's Degree in Business Administration from the University of Florida.



Samuel Wilburn

Mr. Samuel Wilburn is a Consultant with Evergreen. He is a former engineer who possesses a strong background in qualitative and quantitative analysis at the professional level. He is able to apply his knowledge and skills as a Consultant for Evergreen through various functions including: conducting market research and collecting compensation data, utilizing job assessment tools to analyze different job classifications, running regression analyses and recommending appropriate pay grades, editing job descriptions, and preparing performance evaluation files. He is also responsible for developing and maintaining project solution files which comprise of multiple alternatives geared toward bringing salaries to more market-competitive levels and their total cost estimates for implementation. In addition, he assists in preparing presentations and research reports for clients.

Recent Projects that Mr. Wilburn has been involved with include: City of Conroe, TX; North Charleston Sewer District, SC; Transylvania County, NC; Buncombe County, NC; City of Westminster, MD; City of Dalton, GA; City of Douglasville, GA; City of Commerce, GA; City of Dublin, GA; City of Fayetteville, GA; City of Stockbridge, GA; a City of Dalton, GA; Cherokee County, GA; Worth County, GA; Forsyth County, GA; City of Villa Rica, GA; City of Dunwoody, GA; City of Woodstock, GA; City of Jacksonville Beach, FL; Utilities Commission, City of New Smyrna Beach, FL; Florida Telecommunications Relay, Inc.; Town of Palm Beach, FL; Florida Keys Aqueduct Authority; and School Board of Sarasota County, FL.

Mr. Wilburn has an MBA with emphasis in Human Resources and a Bachelor's of Science dual degree in Civil and Environmental Engineering from Florida State University. He also holds a Building Contractor's license in the State of Florida.



Angele Yazbec

Dr. Angele Yazbec is a Senior Analyst with Evergreen. She possesses a Ph.D. in Cognitive Psychology from Florida State University, and has a strong background in quantitative and qualitative analysis. She is able to apply her knowledge and skills as a Senior Analyst for Evergreen through various functions including: conducting market research and collecting compensation data, running regression analyses and recommending appropriate pay grades, and editing job descriptions.



Recent Projects that Dr. Yazbec has been involved with include: Shawnee Community College, IL; Tarrant Community College District, TX; Brazoria County, TX; Santa Fe Community College, NM; for SUNY Ulster, NY; City of Woodstock, GA; City of Dalton, GA; City of Brookhaven, GA; Lee County Commission, AL; City of Orlando, FL; and City of Jacksonville Beach, FL.



Patrick Higman

Mr. Patrick Higman is an Analyst with Evergreen Solutions. As a former accountant, Mr. Higman regularly worked with local and state public associations by overseeing their reserve accounts, creating financial statements on their behalf, and performing financial analysis. This led him to work regularly with large volumes of data and creating custom reporting for senior leadership from it. With a focus on compensation and classification studies, the abilities and skills he obtained is demonstrated in his work, which includes: aggregating market research, collaborating with internal and external teams to perform surveys, evaluating results, and working with internal teams to assess various compensation packages.

Since joining Evergreen Solutions, Mr. Higman has assisted with multiple projects including: Metropolitan Community College, MO; Santa Fe Community College, NM; Maricopa County Community College District, AZ; Washtenaw Community College, MI; SUNY Ulster, NY; Middlesex Community College, NJ; City of Raleigh, NC; North Carolina League of Municipalities; City of Pensacola, FL; r Palm Beach County, FL; St. Johns River State College, FL; and Office of State Courts Administration, FL.

Mr. Higman holds an MBA and a Bachelor of Science in Finance from Florida State University.



Section 3.0:
Price Quote and Certifications



3.0 *Price Quote and Certifications*

Evergreen Solutions, LLC is pleased to present our proposed costs to provide On-Call Human Resources Consulting for the Topeka Metropolitan Transit Authority (Metro). We are committed to providing the highest quality consulting services to our client partners for a reasonable price. Our firm is fortunate that our overhead is minimal and our expenses are reasonable so we can pass that cost savings on to our clients.

We use a blended rate of **\$150 per hour**. Our cost per hour is all inclusive, and includes travel costs (meals and lodging), transportation, fringe benefits, indirect costs (overhead), clerical support, and all other out-of-pocket expenses. The current hourly billing rate for each of the project team that may be assigned to this project is detailed on the Price Quote form. As required in the RFB, the Price Quote form and signed certifications are included.

We are willing to negotiate the time, scope, and cost of the basic tasks, or any other options that Metro wishes to identify.



PRICE QUOTE

Please provide a list of employee types/positions that would be involved in HR consulting services under this contract, with a per-hour rate for each type of employee. Two types of price quotes are acceptable: (1) quote a set price for each year of the contract; or, (2) quote a set price for Year 1 and a maximum percentage increase for Years 2-5.

Type of employee/position	Year 1	Year 2	Year 3	Year 4	Year 5
<u>Project Principal</u>	<u>\$200</u>	<u>\$200</u>	<u>\$200</u>	<u>\$200</u>	<u>\$200</u>
<u>Project Director</u>	<u>\$175</u>	<u>\$175</u>	<u>\$175</u>	<u>\$175</u>	<u>\$175</u>
<u>Project Consultant</u>	<u>\$150</u>	<u>\$150</u>	<u>\$150</u>	<u>\$150</u>	<u>\$150</u>
<u>Analyst</u>	<u>\$75</u>	<u>\$75</u>	<u>\$75</u>	<u>\$75</u>	<u>\$75</u>
<u>Clerical Support</u>	<u>\$35</u>	<u>\$35</u>	<u>\$35</u>	<u>\$35</u>	<u>\$35</u>
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DISADVANTAGED BUSINESS ENTERPRISES (DBE) CERTIFICATION

This contract is subject to the requirements of Title 49, Code of Federal Regulations, Part 26, *Participation by Disadvantaged Business Enterprises in Department of Transportation Financial Assistance Programs*. The national goal for participation of Disadvantaged Business Enterprises (DBE) is 10%. Metro's overall 2019-2021 goal for DBE participation is 2.00%; the race neutral goal is 1.12%, and the race conscious goal is 0.88%. There is no contract goal for this procurement.

The contractor shall not discriminate on the basis of race, color, national origin, or sex in the performance of this contract. The contractor shall carry out applicable requirements of 49 CFR Part 26 in the award and administration of this DOT-assisted contract. Failure by the contractor to carry out these requirements is a material breach of this contract, which may result in the termination of this contract or such other remedy as Metro deems appropriate. Each subcontract the contractor signs with a subcontractor must include the assurance in this paragraph (see 49 CFR 26.13(b)).

The contractor is required to pay its subcontractors performing work related to this contract for satisfactory performance of that work no later than 30 days after the contractor's receipt of payment for that work from Metro.

The contractor may not hold retainage from its subcontractors.

The contractor must promptly notify Metro whenever a DBE subcontractor performing work related to this contract is terminated or fails to complete its work, and must make good faith efforts to engage another DBE subcontractor to perform at least the same amount of work. The contractor may not terminate any DBE subcontractor and perform that work through its own forces or those of an affiliate without prior written consent of Metro.

Signature: 

Name and Title: Linda Recio, President

Company Name: Evergreen Solutions, LLC

Date: September 25, 2019

NON-COLLUSION CERTIFICATION

This is my sworn statement to certify that this proposal was not made in the interest of or on behalf of any undisclosed entity. This proposal is not collusive.

This proposer has not been a party to any agreement or collusion in restraint of freedom of competition by agreement to bid a fixed price, to refrain from bidding, or otherwise. This proposer has not, directly or indirectly, by agreement, communication or conference with anyone, attempted to induce action prejudicial to the interest of Topeka Metropolitan Transit Authority, or of any proposer, or anyone else interested in the proposed contract.

Signature: _____



Name and Title: Linda Recio, President

Company Name: Evergreen Solutions, LLC

Date: September 25, 2019

SUSPENSION / DEBARMENT CERTIFICATION

In regard to 2 CFR Parts 180 and 1200

In accordance with 2 CFR Parts 180 and 1200, the contractor is required to verify that none of its principals or affiliates:

- 1) is included on the federal government's suspended and debarred list;
- 2) is proposed for debarment, declared ineligible, voluntarily excluded or disqualified;
- 3) within three years preceding this proposal, has been convicted of or had a civil judgment rendered against them for (a) commission of fraud or criminal offense pertaining to performing a public transaction, (b) violation of any federal or state antitrust statute, or (c) embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements or receiving stolen property;
- 4) is indicted or charged by a governmental entity for any of the charges in 3) above; and
- 5) has had any public transaction terminated for cause or default within three years preceding this proposal.

The contractor is required to include this requirement in any subcontracts related to this contract.

By signing and submitting its proposal, the proposer certifies that the certification in this clause is a material representation of fact relied upon by Metro. If it is later determined that the proposer knowingly rendered an erroneous certification, in addition to remedies available to Metro, the Federal Government may pursue available remedies, including but not limited to suspension and/or debarment. The proposer agrees to verify that none of its principals or affiliates is included on the federal government's suspended and debarred list at any time throughout the period of this contract. The proposer further agrees to include a provision requiring the same compliance in its subcontracts related to this contract.

Signature: _____

Name and Title: Linda Recio, President

Company Name: Evergreen Solutions, LLC

Date: September 25, 2019