

**AGENDA SUBMITTAL**

**TO:** GCSO Board of Directors

**FROM:** Peter Kampa, General Manager

**DATE:** August 13, 2018

**SUBJECT:** Item 5G. Adoption of a Resolution Approving a Consulting Services Agreement with Koff & Associates for the Preparation of the District's Classification, Compensation and Benefit Study

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**SUMMARY**

The Board of Directors has expressed the priority objective to establish a system including salary and benefits that allows the District to attract, develop and retain highly performing, qualified employees. The District has experienced significant turnover in recent years, and has for the most part been unable to attract employees with state certification levels appropriate for the positions; causing the District to hire uncertified operators and pay for their certification expense and time.

In addition, the various position job responsibilities, pay, certification levels, qualifications and advancement opportunities need to be evaluated for appropriateness, comparability with other progressive agencies and their ability to consistently meet our objectives.

Koff and Associates has submitted a solid proposal and has been very eager and responsive to our needs and interests in the RFP process. The cost of this study is included in the approved 2018/19 Preliminary Budget and staff recommends an immediate contract award.

**ATTACHMENT:**

- Draft Resolution approving agreement with Koff & Associates.
- Request for Proposals
- Koff Proposal

**RECOMMENDED ACTION**

Adopt the Resolution Approving Agreement with Koff and Associates for the preparation of the District's Classification, Compensation and benefits Study.

**RESOLUTION 25-18**

**A RESOLUTION OF THE BOARD OF DIRECTORS OF THE GROVELAND COMMUNITY SERVICES DISTRICT APPROVING A CONSULTING SERVICES AGREEMENT WITH KOFF & ASSOCIATES FOR THE PREPARATION OF THE DISTRICT'S CLASSIFICATION, COMPENSATION AND BENEFIT STUDY**

**WHEREAS**, the Groveland Community Services District (herein referred to as District) is a local government agency formed and operating in accordance with Section §61000 et seq. of the California Government Code; and

**WHEREAS**, the District has established a high priority management objective to develop a work environment, including pay, benefits, advancement opportunities and other attributes that make GCSD an attractive employer for high caliber personnel, and to maintain existing highly performing employees; and

**WHEREAS**, the District desires to employ the services of a qualified, professional consulting firm specializing in classification and compensation studies and skilled in methods for attracting, developing and retaining a quality workforce; and

**WHEREAS**, the District prepared and distributed on July 13, 2018 a Request for Proposals (RFP) for consulting services, which is attached hereto as Exhibit A; and

**WHEREAS**, the District received one proposal meeting the requirements of the District; which is attached hereto as Exhibit B.

**NOW THEREFORE BE IT RESOLVED THAT THE BOARD OF DIRECTORS OF THE GROVELAND COMMUNITY SERVICES DISTRICT DOES HEREBY approve as follows:**

1. The Board of Directors hereby authorizes the General Manager to execute a consulting services agreement with Koff & Associates.
2. This resolution and the Agreement shall be effective immediately.

**WHEREFORE**, this Resolution is passed and adopted by the Board of Directors of the Groveland Community Services District on August 13, 2018, by the following vote:

AYES:

NOES:

ABSENT:

ABSTAIN:

ATTEST:

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Jennifer Flores, Secretary

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Robert Swan, President - Board of Directors

**CERTIFICATE OF SECRETARY**

I, Jennifer Flores, the duly appointed and acting Secretary of the Board of Directors of the Groveland Community Services District, do hereby declare that the foregoing Resolution was duly passed and adopted at a Regular Meeting of the Board of Directors of the Groveland Community Services District, duly called and held on August 13, 2018.

DATED: \_\_\_\_\_



G.C.S.D. Services - 209 / 962-7161

Fax - 209 / 962-4943

Fire Department - 209 / 962-7891

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18966 Ferretti Road P.O. Box 350 Groveland, CA 95321-0350

# **REQUEST FOR PROPOSALS**

## **Groveland Community Services District Compensation and Benefit Study**

**July 11, 2018**

[www.gcsd.org](http://www.gcsd.org)

[\*\*jflores@gcsd.org\*\*](mailto:jflores@gcsd.org)



**REQUEST FOR PROPOSALS**

**Groveland Community Services District  
Compensation and Benefits Study**

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## I. INTRODUCTION

Established as mining camps in 1852, Groveland and the nearby town of Big Oak Flat were once thriving California Gold Rush towns. After the decline in gold production, the historic town of Groveland made its mark offering hospitality to weary travelers coming to and from Yosemite National Park. Located only 26 miles from the northern entrance to the Park on Highway 120, today Groveland is the most convenient gateway for tourists coming from the San Francisco Bay Area, Sacramento, Stockton, or Modesto.

Although Groveland boasts a population of approximately 3,000 full-time residents, this number often triples during the summer months. Visitors are attracted to both the magnificent beauty of our area, as well as the many recreational opportunities offered nearby. Our quiet hilltop community has managed to retain much of its old west



charm, and still boasts the oldest continuously operating saloon in California. Travelers enjoy playing golf at Pine Mountain Lake's 18-hole golf course, taking in the sun at one of the numerous recreational lakes nearby, fishing, hiking, and of course sightseeing.

The Groveland Community Services District (GCSD) service area covers approximately 15 square miles in southern Tuolumne County. The District is bounded on the north by the Tuolumne River, on the south by Mariposa County, on the east by the Stanislaus National Forest, and on the west by Moccasin. GCSD is the owner and operator of the Groveland Water System, which receives water from the City and County of San Francisco's Hetch Hetchy water system.

GCSD's Water System distributes the water to the populated areas of Big Oak Flat, Groveland, and Pine Mountain Lake. The GCSD water supply and distribution system includes three water treatment plants, five storage reservoirs, and approximately 70 miles of distribution piping. The District provides a treated water supply to approximately 3,500 customers. The District also owns and operates the regional wastewater collection, treatment, and regional recycled water system, which provides sewer service to approximately 1,500 customers within the District's service area. The District operates a public park, baseball field and provides fire protection services to the community through a cooperative contract with Tuolumne County and CalFire.

## II. BACKGROUND

GCSD is seeking proposals from qualified professional consulting firms interested in conducting a comprehensive compensation and benefit study of its administrative, professional, support & technical, clerical non-bargaining and bargaining positions including a review of salary ranges and benefit packages. Due to the immediate need to recruit for key District management and mid management positions, this compensation and benefits evaluation needs to be completed in an expedited manner, and therefore the consultant's completion schedule will be considered in contract award. Currently the agency has one union group.

GCSD currently employs approximately sixteen (16) full time employees under ten (10) job titles in 2 departments; administration and operation/maintenance. Management and the Board of Directors are confident in the skills, abilities and work ethic of the current District employees, and wish to provide a work environment and compensation package that is invigorating and attractive; retaining those employee who continue to perform at a high level.

### **III. PROJECT SUMMARY AND DESCRIPTION**

The contract for the Compensation and Benefit Study will be an agreement between GCSD and the consultant(s). The consultant(s) will work under direction of the GCSD General Manager and management team. Funding for the consultant(s) services will be provided by GCSD utilizing local funding sources. The contract will be awarded/executed under Board adopted purchasing procedures or contract law.

The model compensation and benefit study should address all compensation factors insuring GCSD's responsibility to be accountable for and efficient in its expenditures of public funds; while at the same time understanding that the cost is tremendous to be in the constant position of attracting, training, educating and then losing highly motivated employees to large public agencies/utilities to our north, west, and south. The Board has stated "We cannot afford to lose good employees to higher paying local jobs". Some compensation factors that must be considered include internal equity balanced with external competitiveness, affordability, efficiency in administration, flexibility and how well the compensation policy meets the agency's unique needs; especially for state certified water and wastewater operators.

The current and most important primary goal of this effort is to analyze, propose, secure GCSD Board approval of and implement a salary and benefits package that allows the District to immediately recruit for the positions of Operations Manager and Operations Superintendent, and have the expectation to attract a solid, qualified candidate pool. Due to significant expected modifications to the proposed salaries offered in these two positions under recruitment, the salaries for all other District positions must be reviewed to ensure internal equity and competitiveness for retention and attraction.

The end product of the study will include recommendations for the following: an extensive wage and benefit comparison with competitor agencies, to include the value of current benefits and retirement benefits, a recommended compensation plan and salary schedule and an implementation guideline.

Expertise in public agency salary programs is highly desired. The study shall include benefits analysis to ensure a proper mix of salary and benefits in the total compensation package provided to employees.

### **IV. SCOPE OF WORK/SERVICES**

The consultant shall conduct a comprehensive compensation and benefit study and shall develop recommendations and propose options for compensation and benefits of positions included in the current organizational structure. The recommendations should include relevant, comparable

water and wastewater utilities and agencies within the marketplace to ensure GCSD Authority's competitiveness.

The review shall include the following:

**Task 1: Develop Peer/Competitor Agency List and Survey Questions**

- A. A list of potential peer/competitor agencies will be developed for review by the GCSD Management.
- B. The initial long list will be developed through discussions with management.
- C. A long list of potential special districts will be forwarded to the GCSD primary contact person, summarized in a matrix providing types of services provided, organizational structure (what is conducted in-house and what is contracted out), and annual revenue.
- D. The consultant will highlight a short list of recommended peer/competitor agencies, as well as additional selected public agencies. The short list will be finalized with input from the GCSD management team.

**Task 2: Conduct Peer Agency Survey**

- A. Short listed agencies and selected public agencies will be contacted directly by the consultant by telephone and email to initiate the survey.
- B. Available information will be gathered by telephone with a follow-up email questionnaire as required.

**Task 3: Compensation and benefits study shall include:**

- A. A review of the agency salary classification and pay ranges, as well as the agency's current benefit offerings including medical contributions by agency and retirement benefits.
- B. Comparison on all GCSD's positions (to the extent there are comparable positions) with other comparable water and wastewater agencies.
- C. Include top step hourly wage, bottom step and the number of ranges in between.
- D. Health Insurance - report on the value of the agency contribution pays for employee, dependent or dependents, and detail on the employer and employee contributions.
- E. Retirement - type of plan (i.e., PERS 2% @ 55 and 2.5% @ 62), and detail on the employer and employee contributions.
- F. Other Benefits such as employer funded deferred compensation, Social Security, life insurance, flex spending and health savings accounts, District funded education, training

**Task 4: Prepare and Submit Parity Review Summary**

- A. Findings from the Peer/Parity Review Survey will be summarized in a technical memorandum including a comparative matrix and written summary of methodology, survey assumptions and any necessary explanation of differences on responsibilities between GCSD positions and those of the peer agencies.



**Task 5: Recommendations resulting from the study shall include best practices and options as well as a detailed cost analysis for any recommendations, including:**

- A. Evaluation of the agency’s current benefit offering and recommendations regarding options for potential modifications, to include retirement benefit options.
- B. Revised minimum and maximum pay ranges, to include a detailed cost analysis of implementation
- C. Design of methodology to maintain fairness and competitiveness relative to the agency’s classification and comparison system following implementation.
- D. Resolution of differences between internal worth for positions and market data for the same job for the purpose of comparing internal salaries and position worth to similar external agencies.
- E. A matrix showing recommended structures for shared costs of medical premiums.
- F. The consultant will present the recommendations of the study to the GCS D Board of Board of Directors.

**V. CONTACT PERSON(S)**

Primary Contact                      Peter J. Kampa, General Manager  
(209) 962-7161 ext 24  
(209) 591-7100 cell  
[pkampa@gcsd.org](mailto:pkampa@gcsd.org)

Administrative Contact:              Jennifer Flores, Office Manager  
(209) 962-7161 Ext. 13  
[jflores@gcsd.org](mailto:jflores@gcsd.org)

**VI. TENTATIVE TIMETABLE**

July 11, 2018.....Issue Request for Proposals  
July 27, 2018 4:00 PM.....Deadline for receipt of proposals  
August 13, 2018 .....Contract award/execution by Board of Directors  
September 28, 2018 .....Project Completion

Proposals by email must be received no later than 4:00 PM on July 27, 2018. If mail delivery is used, the proposer should mail the proposal early enough to provide for arrival by this deadline. Proposer uses mail or courier service at his own risk. GCS D will not be liable or responsible for any late delivery of proposals. **Postmarks will not be accepted.**

Until award of the contract, the proposals shall be held in confidence and shall not be available for public review. Upon award of a contract to the successful proposer, all proposals shall be public records. No proposal shall be returned after the date and time set for opening thereof.

## **VII. GENERAL CONDITIONS**

### **A. Limitations**

This Request for Proposal (RFP) does not commit GCSD to award a contract, to pay any costs incurred in the preparation of the contract in response to this request, or to procure or contract for services or supplies. GCSD expressly reserves the right to reject any and all proposals or to waive any irregularity or information in any proposal or in the RFP procedure and to be the sole judge of the responsibility of any proposer and of the suitability of the materials and/or services to be rendered. GCSD reserves the right to withdraw this RFP at any time without prior notice. Further, GCSD reserves the right to modify the RFP schedule described above.

### **B. Award**

RFP finalists may be asked to make oral presentations by phone or in person regarding their firms and any special expertise in the necessary areas. All finalists may be required to participate in negotiations and submit price, technical, or other revisions of their proposals as may result from negotiations. GCSD also reserves the right to award the contract without discussion, based upon the initial proposals. Accordingly, each initial proposal should be submitted on the most favorable terms from a price and a technical viewpoint.

### **C. RFP Addendum**

Any changes to the RFP requirements will be made by written addenda by GCSD and shall be considered part of the RFP. Upon issuance, such addenda shall be incorporated in the agreement documents, and shall prevail over inconsistent provisions of earlier issued documentation.

### **D. Verbal Agreement or Conversation**

No prior, current, or post award verbal conversations or agreement(s) with any officer, agent, or employee of GCSD shall affect or modify any terms or obligations of the RFP, or any contract resulting from this RFP.

### **E. Pre-contractual Expense**

Pre-contractual expenses are defined as expenses incurred by applicants and the selected contractor in:

- 1) Preparing proposals in response to this RFP
- 2) Submitting proposals to GCSD
- 3) Negotiations with GCSD on any matter related to proposals

- 4) Other expenses incurred by a contractor or proposer prior to the date of award of any agreement.

In any event, GCSD shall not be liable for any pre-contractual expenses incurred by any applicant or selected contractor. Applicants shall not include any such expenses as part of the price proposed in response to this RFP. GCSD shall be held harmless and free from any and all liability, claims, or expenses whatsoever incurred by, or on behalf of, any person or organization responding to this RFP.

**F. Signature**

The proposal will also provide the following information: name, title, address, telephone number and email of individual(s) with authority to bind the company and designated contact(s) during the period of proposal evaluation. The proposal shall be signed by an official authorized to bind the company and shall contain a statement to the effect that the proposal is a firm offer for at least a sixty (60) day period.

**G. Term**

The term of the contract will be from August 13, 2018 to October 31, 2018.

**H. Fiscal Out Clause**

The Agreement may be terminated at the end of any fiscal year, June 30<sup>th</sup>, without further liability other than payment incurred during such fiscal year, should funds not be appropriated by its governing body to continue services for which the agreement was intended.

**I. Insurance**

The successful firm shall provide evidence of the following insurance requirements: General liability insurance in an amount not less than \$1,000,000 naming the GCSD as an additional insured.

**J. Contract Arrangements**

The proposer is expected to execute a contract similar to GCSD's Professional Services Agreement attached as Exhibit A.

**VIII. PROPOSAL CONTENT AND ORGANIZATION**

Proposals should be limited to specific discussion of the elements outlined in this RFP. The intent of this RFP is to encourage responses which meet the stated requirements and which propose the best methods to accomplish the work.

The organization of the proposal should follow the general outline below. Each proposal should consist of a technical proposal (items 1-7 below) and a cost proposal (item 8).

1) **Transmittal Letter**

The transmittal letter should include the name, title, address, phone number, email and original signature of an individual with authority to negotiate on behalf of and to contractually bind the consultant(s) firm, and who may be contacted during the period of proposal evaluation.

2) **Table of Contents**

A listing of the major sections in the proposal and the associated page numbers.

3) **Introduction**

In this section, the proposer should demonstrate an adequate understanding of the role and relationships of GCSD.

4) **Technical Approach**

- a) A brief description of the consultant(s) firm, including the year the firm was established, type of organization of firm (partnership, corporation, etc.), and any variation in size over the last five years, along with a statement of the firm's qualifications for performing the subject consulting services
- b) A brief description of the firm's experience with similar organizations

5) **Project Management**

The proposer must prepare an explanation of the project management system and practices to be used to assure that the required proposed services are completed timely and that the quality of the products will meet GCSD's requirements; within the earliest possible schedule which provides solid, valid results. A proposed project schedule containing major milestones shall be included.

6) **Consultant Staff**

The proposal must describe the qualifications and experience of each professional who will participate in the project, including a resume for each member of the project team. A project manager must be designated, and an organizational chart showing the manager and all project staff proposed that will provide services must be included.

7) **Consultant Qualifications and References**

The proposal must include a list of references for similar clients. References should include client contact names, addresses, phone numbers, descriptions of the type of work performed, approximate dates on which the work was completed, and professional staff who performed the work. If a subcontractor is proposed, two to three similar qualifications and references should be provided for the subcontractor.

8) **Cost Proposal**

The cost proposal shall describe monthly maximum fee, hourly rate for consultant(s) and employees to be assigned to this contract, a summary of any other related costs that are to be billed directly and a total "not-to-exceed" bid for this proposal.

9) **Number of Copies**

The proposer shall submit the proposal by email to [jflores@gcsd.org](mailto:jflores@gcsd.org) by the deadline, or if the proposal file is too large to email, the consultant must provide three (3) bound copies and one (1) unbound original (suitable for reproduction) of all submittals in response to this Request for Proposals.

All proposals shall be received no later than 4:00 PM July 27, 2018 at the **GCSD by email, or delivered to 18966 Ferretti Road, Groveland CA 95321.**

All delivered written proposals shall be submitted in a sealed envelope that is clearly marked; and email submittals containing the title “Proposal –GCSD Compensation and Benefit Study”. Late proposals shall not be accepted.

All proposals, whether selected or rejected, shall become the property of the GCSD.

All proposals received prior to the date and time specified above for receipt may be withdrawn or modified by written request of the proposer. To be considered, the modification must be received in writing, and in the same number of copies as the original proposal, prior to the date and time specified for receipt of proposals.

**IX. PROPOSAL EVALUATION AND SELECTION**

GCSD reserves the right to amend or alter the selection process without notice. It is anticipated that a proposal review panel will evaluate the proposals. Applicants may be contacted and asked for further information, if necessary, and may be called for oral interviews. GCSD may elect to contact references or clients of the applicants. The panel will make recommendations to the GCSD General Manager on the basis of the proposal, oral interview, and reference check. GCSD reserves the right to reject all proposals or to select a consultant based solely upon the written proposal and not convene oral interviews.

Upon receipt of the proposals, a technical evaluation will be performed. Each of the major sections of the proposal will be reviewed and evaluated with criteria designed to help judge the quality of the proposal. Evaluation criteria will include such considerations as:

- Project approach and data gathering methodology in consideration of the project schedule
- Specialized expertise with similar organization
- Familiarity with public agency salary programs
- Specific related experience and qualifications
- Understanding of and approach to scope of work/ services
- Qualifications of personnel to be assigned to this contract
- Hourly fee schedule of staff and total bid amount

**X. PAYMENT SCHEDULE**

Fees for eligible services rendered shall be billed on a monthly or hourly basis. Payment will not be authorized for services rendered and/or expenses incurred prior to contract award, as defined in Section VII, General Conditions, Part E of this RFP. The consultants(s) should forward a copy of all invoices for payment for work performed and associated expenses, by the fifth (5<sup>th</sup>) day of each month for prior month's service.





July 27, 2018

# Compensation and Benefit Study Proposal

Groveland Community Services District

Submitted by:

**Koff & Associates**

**GEORG S. KRAMMER**  
Chief Executive Officer

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## TRANSMITTAL LETTER and EXECUTIVE SUMMARY

July 27, 2018

Ms. Jennifer Flores  
Administrative Office Manager/District Secretary  
Groveland Community Services District  
18966 Ferretti Road  
Groveland, CA 95321

Dear Ms. Flores:


Thank you for the opportunity to respond to your Request for Proposals for a **Compensation and Benefits Study** for the **Groveland Community Services District** ("District"), to be completed by September 28, 2018. We are most interested in assisting the District with this important Compensation and Benefits study and feel that we are uniquely qualified to provide value to your organization based on our experience working with numerous Community Service Districts (please see "Technical Approach" section of this proposal) and neighboring counties (such as El Dorado) as well as working in the District's own County of Tuolumne, hundreds of cities, JPAs, and non-profit agencies throughout California. Finally, we led a General Manager recruitment for the District in 2008 and thus, have familiarity with the District.

Koff & Associates is an experienced Human Resources consulting firm that has been providing human resources consulting services to cities, counties, special districts, courts, educational institutions, and other public agencies for over thirty-four (34) years. The firm has achieved a reputation for working successfully with management, employees, and governing bodies. We believe in a high level of dialogue and input from study stakeholders and our proposal speaks to that level of effort. That extra effort has resulted in close to *100% implementation* of all of our classification and compensation studies.

As President of the firm, Katie Kaneko would assume the role of Project Director and be responsible for the successful completion of this project. She can be reached at the phone on the cover page of this proposal and her email address is [kkaneko@koffassociates.com](mailto:kkaneko@koffassociates.com). If you wish to reach me, I can also be reached at the same phone number and my email is [gkrammer@koffassociates.com](mailto:gkrammer@koffassociates.com).

This proposal will remain valid for at least sixty (60) days from the date of submittal. Please do not hesitate to call if you have any questions or wish additional information. We look forward to the opportunity to provide professional services to the **Groveland Community Services District**.

Sincerely,



Georg S. Krammer  
Chief Executive Officer



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## INTRODUCTION

**Groveland Community Services District** ("District") located in Tuolumne County, at this time desires a Compensation and Benefits Study to be completed by September 28, 2018, due to an immediate need by the District to recruit for key District management and mid-management positions, specifically, the positions of Operations Manager and Operations Superintendent.

We understand that recruitment for these two critical positions hinges on expected significant changes to the other District positions that will be surveyed in this Compensation and Benefits Study, thereby ensuring internal equity as well as competitiveness for attraction and retention.

The District desires human resources consulting assistance to conduct an objective analysis of the current compensation and benefits practices of the District; recommend changes that result in equitable, competitive and legally defensible pay practices that will enrich the attraction and retention of qualified individuals as well as enhance opportunities for growth and professional development; evaluate the current employee benefit and compensation plan against relatively local markets and comparable employers (particularly those agencies to whom the District is losing staff such as SFPUC Hetch Hetchy, Tuolumne Utilities District, Turlock Irrigation District, Modesto Irrigation District, and others); and provide recommendations for adjustments.

The District has eleven (11) classifications (3 of which have 3 levels each, for a combined total of 17 classifications):

### Administration

- *Admin Office Manager (per the District's email of July 13, this title may change as this position is more of an Admin Manager overseeing the Admin Department and all admin functions, not just the office)*
- *Finance Clerk (title may change as this position is more of a Finance Officer responsible for all District financial business)*
- *Administrative Services Technician*
- *Office Clerk*

### Operations

- *Operations and Maintenance Manager*
- *Operations and Maintenance Superintendent*
- *Chief Plant Operator*
- *Water/Wastewater Operator I, II, III*

### Collections and Distribution

- *Collections and Distribution Lead*
- *Collection and Distribution System Operator I, II, III*

### Maintenance Mechanic

- *Maintenance Mechanic I, II, III*

Two (2) departments (Administration and Operations/Maintenance) encompass these classifications and have a current total of sixteen (16) full-time employees. There are both clerical non-bargaining and bargaining positions included above. There is only one union group.



The desired final deliverables for the Study are:

- [1] recommendations for an extensive wage and benefit comparison with competitor agencies (“comparators”), including the value of current benefits and retirement benefits;
- [2] a recommended compensation plan and salary schedule; and
- [3] an implementation guideline.

Both Management and the Board of Directors wish to provide a work environment and compensation package that is invigorating and attractive, as well as competitive. They are confident in the skills and work ethic of current employees and wish to retain those who continue to perform at a high level.



## TECHNICAL APPROACH

Koff & Associates (“K&A”) is a full-spectrum, public-sector human resources consulting firm founded by Gail Koff in 1984. K&A has been assisting cities, counties, special districts (including CSDs, water districts, sanitation agencies, transportation agencies, etc.), other public agencies, and non-profit organizations with their classification and compensation needs for over thirty-four (34) years.

We are a private California corporation, #2785458, and our legal name is Kaneko and Krammer Corp. dba Koff & Associates, Inc. We were incorporated on September 23, 2005. Our headquarters are in Berkeley, CA, and we have satellite offices in Southern California, the Central Valley, and the Sacramento Region as well as Arizona and Oregon.

We are a California State-certified Small Business Enterprise, and through the County of Alameda, we are also a locally certified Local, Small Local, and Very Small Local Business Enterprise.

We are familiar with the various public sector organizational structures, agency missions, operational and budgetary requirements, and staffing expectations. We have extensive experience working in both union and non-union environments (including service as the management representative in meet & confer and negotiation meetings), working with City Councils, County Commissions, Boards of Directors, Boards of Supervisors, Boards of Trustees, Merit Boards, and Joint Power Authorities.

The firm’s areas of focus are classification and compensation studies (approximately 70% of our workload); organizational development/assessment studies; performance management and incentive compensation programs; development of strategic management tools; policy/procedure development and employee handbooks; training and development; executive search and staff recruitments; public agency consolidations and separations; Human Resources audits; and serving as off-site Human Resources Director for smaller public agencies that need the expertise of a Human Resources Director but do not need a full-time, on-site professional.

Without exception, all of our classification and compensation studies have successfully met all of our intended commitments; communications were successful with employees, supervisors, management, and union representatives; and we were able to assist each agency in successfully implementing our recommendations. All studies were brought to completion within stipulated time limits and proposed budgets.

Our long list of hundreds of satisfied clients (<https://koffassociates.com/our-clients/>) is indicative of our firm’s reputation as being a quality organization that can be relied on for producing comprehensive, sound, and cost-effective recommendations and solutions. K&A has a reputation for being “hands on” with the ability and expertise to implement its ideas and recommendations through completion in both union and non-union environments.

K&A relies on our stellar reputation and the recommendations and referrals of past clients to attract new clients. Our work speaks for itself and our primary goal is to provide professional and technical consulting assistance with integrity, honesty and a commitment to excellence. We are very proud of the fact that we have not had any formal appeals in our entire history, working with hundreds of public agency clients



and completing hundreds of classification and/or compensation, organizational, and other types of studies.

Over the last five (5) years we have allowed our firm, and our offices as well, to gradually expand to meet the increasing demand from the public sector. Five years ago, Koff & Associates had ten (10) employees and we were located in the City of Emeryville for a number of years. At the current time, we have twenty-two (22) employees; we also expanded our offices to a larger space in the adjacent City of Berkeley that can accommodate all of us.

As indicated above, our work volume has dramatically increased in the last 5 years and we turn down projects occasionally because we prefer to provide each of our projects and all of clients the appropriate resources and attention, resulting in a high level of quality control, excellent communication between clients and our team, commitment to meeting timelines and budgets, and a consistently high-caliber work product.

A few of the Community Services Districts (“CSD”) and other special districts for whom we have performed work over the course of our history are:

- Cosumnes CSD (Classification, Compensation)
- Desert Recreation District (Compensation)
- Discovery Bay (Town of) CSD (Classification, Compensation, Employee Handbook development)
- Dublin San Ramon Services District (Classification Studies, Organizational Study, Compensation)
- El Dorado Hills CSD (Classification, Compensation)
- Greater Vallejo Recreation District (Recruitment)
- Hayward Area Recreation & Park District (Classification, Compensation)
- Helendale CSD & Phelan Piñon Hills CSD (currently conducting Class & Compensation studies for these two districts, in a combined effort to achieve economies of scale, as both use the same comparator agencies)
- Heritage Ranch CSD (Classification, Compensation)
- Hidden Valley Lake CSD (Compensation)
- Incline Village GID (Total Compensation)
- Kensington Police Protection CSD (Total Compensation)
- Livermore Area Rec & Park District (Classification)
- Mendocino Coast RPD (Classification, Compensation)
- Mountain House CSD (Classification, Compensation)
- Nipomo CSD (Compensation; Recruitment)
- Rancho Murieta CSD (Compensation Studies, Performance Management, and 360 Degree Feedback)
- Tamalpais CSD (Recruitment)
- Templeton CSD (HR Audit)
- Truckee Donner Rec & Park District (Classification, Total Compensation)



## PROJECT MANAGEMENT

The purpose of the Compensation and Benefits study is to review the District's compensation structure for the studied classifications and to conduct a total compensation market survey (salaries plus benefits) using a set of appropriate comparator agencies. The identification of comparator agencies, benchmark classifications, and benefits to be collected is an iterative process that includes all stakeholders. We have found this open discussion philosophy to be critical to our success for organizational buy-in. Once the external data development is completed, we will make specific recommendations for internal equity for non-benchmarked classifications and classifications without a large enough market sampling.

The compensation and benefits study will contain specific recommendations regarding the integration of all study classifications into the District's compensation structure, with the goal of developing a clearly designed, internally equitable format that is flexible for career opportunity and future growth. Our study will make recommendations regarding a salary structure that takes the District's compensation preferences into consideration as well as the appropriate placement of each classification on the District's salary schedule.

The study includes a significant number of meetings with the Study Project Team, management, employees (and employee representation), and the District's General Manager. We have expertise in labor/management relations and understand the importance of active participation by all stakeholders to ensure a successful outcome. The meetings and "stakeholder touch-points" that we recommend ensure understanding of the project parameters, enhance accurate intake and output of information, and create a collaborative and interactive approach that will result in greater buy-in for study recommendations. This interactive approach, although time-consuming, has resulted in almost 100% implementation success of K&A's studies.

### Total Compensation Study Objectives

- To review and understand all current documentation, rules, regulations, policies, procedures, budgets, class descriptions, organizational charts, memoranda of understanding ("MOU"), personnel policies, wage and salary schedules, and related information so that our recommendations can be operationally incorporated with a minimum of disruption;
- To conduct start-up Study Project Team meetings with management, study project staff, and other stakeholders to discuss any specific concerns with respect to the development of compensation recommendations; finalize study plans and timetables; conduct employee orientation sessions with management and staff in order to educate and explain the scope of the study and describe what are and are not reasonable study expectations and goals;
- To make recommendations regarding a list of appropriate comparator agencies, benchmark classifications, and benefits to be collected prior to beginning the compensation study;
- To collect accurate salary and benefit data from the approved group of comparator agencies and to ensure that the information is analyzed in a manner that is clear and



- comprehensible to the Study Project Team, Human Resources, management, the governing body, and employees;
- To carefully analyze the scope and level of duties and responsibilities, requirements for successful work performance, and other factors for survey classes according to generally accepted compensation practices;
  - To review the District's compensation structure and practices and develop compensation recommendations that will assist the District in recruiting, motivating, and retaining competent staff;
  - To develop a compensation structure that meets all legal requirements, is totally non-discriminatory, and easily accommodates organizational change, growth, and operational needs;
  - To develop solutions that address pay equity issues, analyze the financial impact of addressing pay equity issues, and create a market adjustment implementation strategy supporting the District's goals, objectives, and budget considerations (affordability);
  - To evaluate benefit offerings in the labor market and make recommendations for better alignment and/or different benefit offerings as indicated by the analysis and best practices;
  - To create a comprehensive final report summarizing the compensation study approach and methodology, analytical tools, findings, and recommended compensation structure;
  - To recommend appropriate internal salary relationships and allocate classes to salary ranges in a comprehensive salary range plan;
  - To work collaboratively and effectively with the District and its stakeholders while at the same time maintaining control and objectivity in the conduct of the study;
  - To document all steps in the process and provide documentation and training for Human Resources and other staff, as appropriate, in compensation analysis methodologies so that the District can integrate, maintain, administer, and defend any recommended changes after the initial implementation;
  - To help the District secure approval of and implement a salary and benefits package that allows the District to immediately recruit for both the Operations Manager position and the Operations Superintendent position; and
  - To provide effective ongoing communications throughout the duration of the project and continued support after implementation.

## Study Deliverables & Work Plan (Methodology)

### **Deliverable A: Meetings with the Study Project Team and Management Staff for Review of Process, Products and Documents Required**

During the initial meeting with the Study Project Team, we will discuss the compensation study factors that need to be agreed upon. This task includes identifying the District's Study Project Team (Human Resources, etc.), contract administrator, and reporting relationships. Our team will conduct an orientation and briefing session with the Study Project Team to explain process and methodology; create the specific work plan and work schedule; identify subsequent tasks to be accomplished; reaffirm the primary objectives and specific end products; determine deadline dates for satisfactory completion of the overall assignment;





determine who will be responsible for coordinating/scheduling communications with employees, managers, and stakeholders; and develop a timetable for conducting the same.

Included in this task will be the gathering of written documentation, identifying current incumbents, and assembling current class descriptions, organizational charts, salary schedules, budgets, employment contracts, personnel policies, previous compensation studies, and any other relevant documentation to gain a general understanding of District operations.

District terminology and methods of current compensation procedures will be reviewed and agreed to. We will discuss methodology, agree to formats for compensation results, identify appropriate comparator agencies, benchmark classifications, and benefits to be surveyed for compensation survey purposes. We will respond to any questions that may arise from the various stakeholders.

#### **Deliverable B. List of Comparator Agencies, Benchmark Classifications, and Benefits to be Collected**

During the initial meeting with the Study Project Team, we will discuss and agree to the compensation study factors. We will identify appropriate, relevant comparator agencies that will be included in the external market survey, which will be the foundation of ensuring that the District's salaries for the studied classifications are competitively aligned with the external labor market. We will also confirm those classifications that will be surveyed in the market (i.e., benchmark classifications), with the intention of internally aligning the remaining classifications with those that were surveyed.

Finally, we will determine the list of benefits that the District wants to include in the total compensation data gathering process.

##### **1. Determination of Comparator Agencies**

The selection of comparator agencies is a critical step in the study process. We typically use the following factors to identify appropriate comparators and will receive approval before proceeding with the total compensation survey.

Our recommended methodology is that we involve the General Manager, management, Human Resources, and employee representation in the decision-making process of selecting which comparable agencies are included, **PRIOR** to beginning the study. Our experience has shown that this is the most successful approach. We typically also recommend that the Board of Directors weigh in on the comparator agencies but are flexible in terms of how District management wants to handle their input and guidance for the study.

The factors that we typically review when selecting and recommending appropriate comparator agencies include:

- **Organizational type and structure** – While various organizations may provide overlapping services and employ some staff having similar duties and responsibilities, the role of each organization is somewhat unique, particularly in regard to its relationship to the citizens it serves and level of service expectation. During this iterative process, the District's current/previous list of comparators and the advantages/disadvantages of including them or others will be discussed.



- **Similarity of population served, District demographics, District staff, and operational budgets** – These elements provide guidelines in relation to resources required (staff and funding) and available for the provision of services.
- **Scope of services provided** – While having an organization that provides all of the services at the same level of citizen expectation is ideal for comparators, as long as the *majority* of services are provided in a similar manner, sufficient data should be available for analysis. Our focus here will be water and wastewater operations, including water treatment and distribution, and wastewater collection and treatment.
- **Labor market** – The reality of today’s labor market is that many agencies are in competition for the same pool of qualified employees. Individuals often do not live in the community they serve. Therefore, the geographic labor market area (where the District may be recruiting from or losing employees to) will be taken into consideration when selecting potential comparator organizations. Per the RFP, the District has identified agencies that it competes with for qualified talent; those agencies will be taken into consideration for purposes of our analysis. It is important to understand and consider the District’s competitive landscape and include agencies in the study to whom the District loses talent.
- **Cost-of-living** – The price of housing and other cost-of-living related issues are some of the biggest factors in determining labor markets. We will review overall cost-of-living of various geographic areas, median house prices, and median household incomes to determine the appropriateness of various potential comparator agencies.

We typically recommend using ten to twelve (10-12) comparator agencies for all survey benchmarks in order to achieve statistical significance but are flexible and can easily use a different approach based on the District’s preferences.

## 2. Determination of Benchmark Classifications

In the same collaborative manner as described in Step 1 above, we will work with the District’s stakeholders to select those classifications that will be surveyed.

“Benchmark classes” are ordinarily chosen to reflect a broad spectrum of class levels. In addition, those that are selected normally include classes that are most likely to be found in other similar agencies, and therefore provide a sufficient valid data sample for analysis. Internal relationships will be determined between the benchmarked and non-benchmarked classifications and internal equity alignments will be made for salary recommendation purposes.

Due to the fact that the labor market typically yields reliable data, we recommend using approximately 60-65% of all classifications as benchmarks but we are happy to use a different model.

Due to the small number of classifications in this study, we will most likely survey the majority of them. The exception may be those classification series that have more than one level for which we would typically only survey the journey-level and internally align the other levels of the class series (such as Water/Wastewater Operator I, II, III, or Maintenance Mechanic I, II, III). We are happy to discuss our methodology with the District if we are selected to perform this project.



### 3. Determination of Salary and Benefits Data to Be Collected

In addition to base salaries, benefit data elements for a total compensation study normally include at least the following (which are generally available to all staff in a specific job classification):

- **Monthly Salary** – The top of the normal, published salary range. All figures are presented on a monthly or annual basis. We normalize the salary data to reflect number of hours in the work week and/or roll-up of retirement or other benefits in base salaries.
- **Employee Retirement** – This includes two figures: the amount of the employee’s State or other public or private retirement contribution that is contributed by the agency and the amount of the agency’s Social Security contribution.
- **Retiree Healthcare** – With healthcare costs rising and retiree healthcare and liabilities increasing for many public agencies, we also collect this information.
- **Insurance** – This typically includes Health, Dental, Vision, Life, Long-Term Disability, Short-Term Disability, and other insurance coverage.
- **Leave** – Other than sick leave, which is usage-based, leave is the amount of days off for which the organization is obligated. All days will be translated into direct salary costs.
  - ❖ **Vacation:** The number of vacation days available to all employees after five (5) years of employment.
  - ❖ **Holidays:** The number of holidays (including floating) available to the employee on an annual basis.
  - ❖ **Administrative/Personal Leave:** Administrative leave is normally the number of days available to management staff to compensate for the lack of payment for overtime. Personal leave may be available to other groups of employees to augment vacation or other time off.
- **Deferred Compensation** – We report any employer contribution made on the employee’s behalf, whether dollar amount or percentage of salary, that does not require an employee-matching contribution. We can also report employer contributions that do require an employee match and would do so as a separate report.
- **Other** – This category includes any other benefits that are available to all employees within a classification and/or not already specifically detailed, such as Auto Allowance, Tuition Reimbursement, Flexible Spending Accounts (FSA), Health Savings Accounts (HSA), District-funded education, training, and other benefits that the District wants to add.

In addition, we will collect the top step hourly wage, bottom step, and the number of ranges in between for base salary purposes.

#### Deliverable C. Data from Comparators

K&A does not collect market compensation data by merely sending out a written questionnaire. We find that such questionnaires are often delegated to the individual in the department with the least experience in the organization and given a low priority. Our experienced compensation analysts conduct all of the data collection and analysis to ensure validity of the data and quality control. This approach also ensures that we compare job description to job description and not just job titles, therefore ensuring true “matches” of at least 70%, which is the percentage we use to determine whether to include a comparator classification or not. Our job analysis method is the whole position analysis approach.



Objective factors in the whole position classification methodology include:

1. Education, Training, and Certifications/Licenses
2. Required Experience
3. Problem Solving/Ingenuity
4. Attention/Stress (Concentration/Time Pressure & Interruptions)
5. Independence of Action/Responsibility
6. Contacts with Others/Internal/External
7. Supervision Received and/or Given to Others
8. Consequences of Action/Decisions Made on the Job
9. Equipment Used
10. Working Conditions
11. Physical/Mental Demands

Our analysis will include written documentation of our assessment methodology and assessment for each position surveyed.

We typically collect classification descriptions, organization charts, salary schedules, personnel policies, MOUs, and other information via website, by telephone, or by an onsite interview. With the prior knowledge from the data gathered directly from each comparator agency and our experience in the public sector human resources field, our professional staff makes preliminary “matches” and then schedules appointments by telephone, or sometimes in person, with knowledgeable individuals to answer specific questions.

We find that the information collected using these methods has a very high validity rate and allows us to substantiate the data for employees, management, and governing bodies.

#### **Deliverable D. Analysis and Preliminary Review of Data**

Data will be entered into spreadsheet format designed for ease of interpretation and use. The information will be presented in a format that will identify the comparator positions used for each classification comparison. Information will be calculated based upon both average and median figures allowing the District to make informed compensation decisions.

Other elements of the compensation survey report are agencies surveyed; comparable class titles; salary range maximum/control point; number of observations; and percent of the District’s salary range is above/below the market values. In addition, we will include any type of statistical representation and analysis that the District desires such as 60<sup>th</sup>, 70<sup>th</sup>, or any other percentiles.

Benefits data will be displayed in an easy-to-read format. You will receive three sets of spreadsheets per classification, one with base pay, one with the benefits detail, and one with total compensation statistical data. In addition, we are often asked to collect “other” benefits (as listed in the benefits section above), which we typically report on a separate spreadsheet.



Findings from the peer/parity review survey will be summarized in a technical memorandum including a comparative matrix and written summary of methodology, survey assumptions, and necessary explanation of differences in responsibilities between GCSO positions and those of the peer agencies.

**Deliverable E. Draft Compensation Findings/Additional Analysis/Study Project Team Meetings**

We distribute our draft findings to the Study Project Team. After their preliminary review, K&A will meet with the Study Project Team and other stakeholders (including management, employees, and Human Resources) to clarify data, to receive requests for reanalysis of certain comparators, and to answer questions and address concerns. This provides an opportunity for the Study Project Team and other stakeholders to review and question any of our recommended benchmark comparator matches. If questions arise, we conduct follow-up analysis to reconfirm our original analysis and/or make corrections as appropriate.

**Deliverable F. Analysis of Internal Relationships and Alignment**

To determine internal equity for all studied positions, considerable attention will be given to this phase of the project. It is necessary to develop an internal position hierarchy based on the organizational value of each classification. Again, we utilize the whole position analysis methodology as described earlier.

By reviewing those factors, we will make recommendations regarding vertical salary differentials between classes in a class series, for example, as well as across departments. This analysis will be integrated with the results of the compensation survey and the District's existing compensation plan.

The ultimate goal of this critical step in the process is to address any potential internal equity issues and concerns with the current compensation system, including compaction issues between certain classifications. We will create a sound and logical compensation structure for the various levels within each class series, so that career ladders are not only reflected in the classification system but also in the compensation system, with pay differentials between levels that allow employees to progress on a clear path of career growth and development. Career ladders will be looked at vertically, as well as horizontally, to reflect the District's classification structure.

**Deliverable G. Compensation Structure and Implementation Plan**

Depending on data developed as a result of the internal analysis, we will review and make recommendations regarding internal alignment and the salary structure (set of salary ranges, salary differentials, steps within ranges, and/or alternative compensation plans) within which the classes are allocated, based upon the District's preferred compensation model. In addition, we will develop externally competitive benefit comparisons for all classifications. Finally, we will develop a proposed implementation plan based on the study results and recommendations.

We will conduct a competitive pay analysis using the market data gathered to assist in the determination of external pay equity and the recommendation of a new base compensation structure. We will conduct a comparative analysis to illustrate the relationships between current pay practices and the newly determined market conditions and develop solutions to address pay equity issues, analyze the financial



impact of addressing pay equity issues, and create a market adjustment implementation strategy supporting District goals, objectives, and budget considerations.

We will develop recommendations covering special compensation issues such as salaries above the maximum; seniority; promotions; maintenance of the salary schedules; etc.

Draft recommendations will be discussed with the Study Project Team and management for discussions and decisions on overall pay philosophy and the practicality of acceptance and prior to developing an Interim Report.

#### **Deliverable H. Final Report and Guidelines for Implementation**

A Draft Interim Report of the Compensation & Benefits Study) will be completed and submitted to the Study Project Team for review and comment. The report will provide detailed compensation findings, documentation, and recommendations. The report will include:

- A comparative matrix summarizing the review of comparator agencies and a written summary of our methodology;
- A set of all market data spreadsheets;
- A proposed Salary Range Placement document, including revised minimum and maximum pay ranges;
- A procedure to address employees whose base pay exceeds the maximum of their newly assigned pay range;
- Discussion of how the compensation program affects employee recruitment and retention efforts;
- Implementation issues and cost projections surrounding our recommendations;
- Recommendations for best practices going forward; and
- A guide for rules, policies and procedures for the District in implementing, managing and maintaining the compensation system, including retirement benefit options, as appropriate.

Once all of the District's questions/concerns are addressed and discussed, a Final Compensation & Benefits Report will be created and submitted in the District's preferred format.

The Final Report will incorporate any appropriate revisions identified and submitted during the review of the draft report.

#### **Deliverable I. Formal Appeals Support**

Should the District have a formal appeal process regarding the allocation of positions to classifications and of classifications to salary ranges, this proposal does not cover time regarding a formal appeal process. Should our on-site participation be desired, our stated composite hourly rate will be honored.

As mentioned above, however, our internal process usually addresses any appeal issues.



#### Deliverable J. Final Presentation

Our proposal includes multiple meetings and weekly oral and written status/progress updates to the Study Project Team. Regarding the involvement of the Board of Directors, we recommend at least one initial meeting to identify the comparator agencies to be included in the study, one interim study session (to discuss the initial findings of the compensation study), and one final presentation of our Final Report. Of course, we are flexible regarding having more or less interaction with the Board, based on the District's preferences.

### Post-Implementation Consultation and Support

We are committed to providing the District with the highest-quality product and service. Providing ongoing consultation and support after study implementation is a service that is included in our professional fees and a continued relationship-building aspect of our client relationship that we highly value.

We often find that clients will call or email with follow-up questions and to discuss certain aspects of the study, ask why decisions and recommendations were made, and other important components of the study. We consider post-implementation support as part of our customer service.

Should the District request any additional onsite meetings and/or training after implementation of the study and/or other specific, identifiable work efforts, such as position reclassification studies, creating new class descriptions, or conducting annual surveys, we would honor our composite hourly rate for actual hours spent at the District. However, from experience, we expect that most follow-up support will be conducted via telephone and email and this is absolutely included in our "Not To Exceed Fee" for this project.

### Stakeholder Engagement

The meetings and communications with stakeholders that we recommend ensure understanding of the project parameters, enhance accurate intake and output of information, and encourage a collaborative and interactive approach that will result in greater buy-in for study recommendations. This interactive approach, although time-consuming, has resulted in almost 100% implementation success of K&A's studies.

We believe in an interactive and collaborative process with the whole organization and in a high level of stakeholder contact and interaction to ensure organizational buy-in of the study throughout the entire process. Following are the major milestones at which we touch base with Human Resources, employees, managers, and other stakeholders, as appropriate:

- Initial study kick-off and employee/management orientation meetings;
- Stakeholder input regarding a list of appropriate comparator agencies;
- District stakeholder review of compensation study data and contact with them to address any challenges to the market comparables we identified for each classification;
- Stakeholder input on internal salary relationship analysis and recommendations; and
- Stakeholder input regarding final compensation plans and structure recommendations.



These steps will ensure that the study results in a product that is accepted and trusted by all levels within the organization. Beyond sound mechanics, our approach includes sufficient communication steps to ensure that the study methodology is understood and the results are regarded as expert, impartial, and fair.

### Time Requirements

Our professional experience is that compensation studies of this scope can take approximately two to three (2 - 3) months to complete, allowing for adequate compensation data collection and analysis, review steps by the District, the development of final reports, any appeals, and presentations.

However, with partnership from the District in adhering to a very tight timeline, it is possible for us to complete it in eight to nine (8 – 9) weeks as the gathering of information (Deliverable C) alone, is the most time-consuming part of the process. To save time, we suggest surveying only ten (10) comparator agencies. We have based our Cost Proposal on the use of 10 comparators. Adding two more (for a total of 12), will add more time to the timeline below, and more hours and dollars to the Cost Proposal.

We typically find that completing Deliverables C & D for a study of this size can be accomplished within 4-5 weeks, depending on the number of agencies surveyed and how cooperative they are in providing their salary and benefits data. At this point, the District will have market data in your hands to set salaries for your job classifications, especially the two you are eager to recruit for.

The following is our suggested timeline (which can be modified based on the District’s needs):

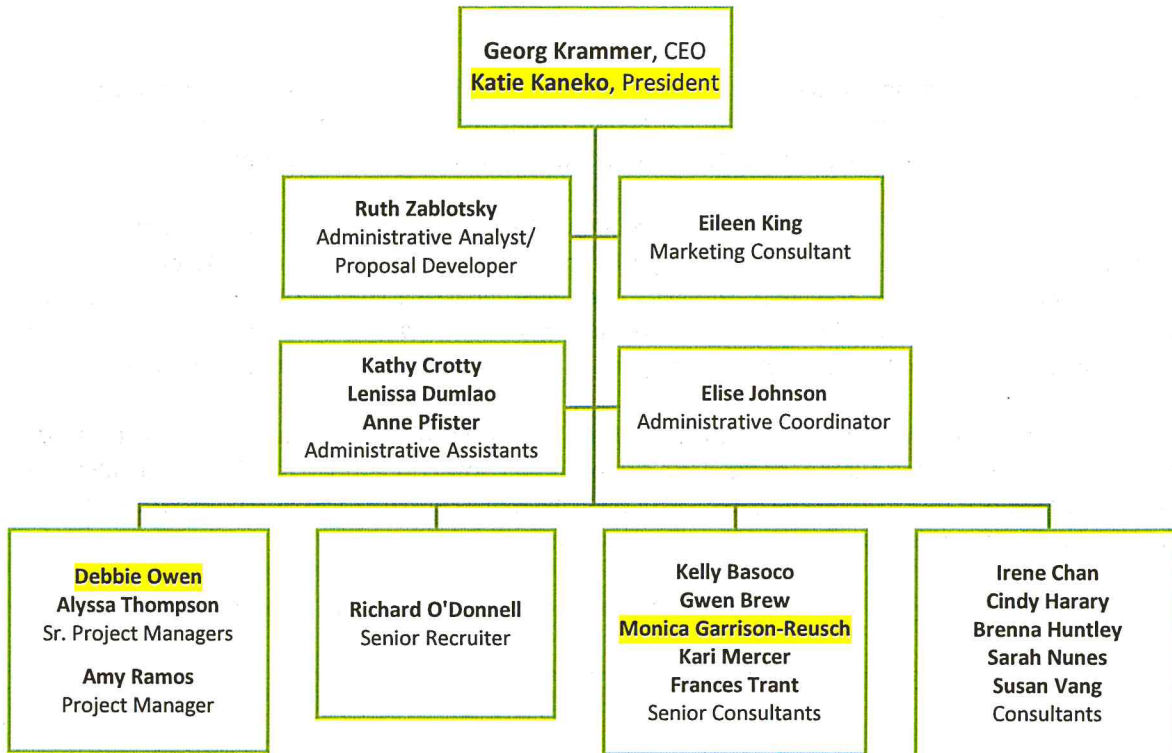
| Deliverables | <b>Compensation &amp; Benefits Survey</b>   | Week #       |
|--------------|---|--------------|
| A.           | Meetings with Study Project Team and Management Staff for Initial Documentation Review  | Week 1       |
| B.           | List of Comparator Agencies, Benchmark Classifications, and Benefits to be Collected (our goal is to come prepared to the initial kick-off meeting with our comparator analysis so that the District can make a decision regarding its survey market and we can begin data collection immediately after project kick-off) | Week 1       |
| C.           | Data from Comparators   | Week 5       |
| D.           | Analysis and Preliminary Review of Data   | Week 6       |
| E.           | Draft Compensation Findings/Additional Analysis/Study Project Team Meetings   | Week 7       |
| F.           | Analysis of Internal Relationships and Alignment  | Week 8       |
| G.           | Compensation Structure and Implementation Plan  | Week 8       |
| H.           | Final Report and Guidelines for Implementation  | Week 9       |
| I.           | Formal Appeals Support *  | As Needed    |
| J.           | Final Presentation  | As Scheduled |





## CONSULTANT STAFF

Our entire team consists of twenty-two (22) employees as shown below in our organizational chart; those who will be assigned to this project are highlighted in yellow and their short biographies follow (full résumés may be found in the Appendix of our proposal):



**No subcontractors will be assigned to this study.**

All members of our team have worked on multiple total compensation (salary plus benefits) studies and are well acquainted with the wide array of public sector organizational structures, compensation structures, classification plans, as well as the challenges and issues that arise when conducting studies such as this one for the District.

Following are short biographies of the specific staff who will be assigned to this study:

**Catherine “Katie” Kaneko, C.P.A., P.H.R.  
President**

Katie is one of the two principals of Koff & Associates. She brings 25 years of management-level human resources and consulting experience to K&A. She has extensive experience in classification analysis and evaluation techniques, compensation, performance incentive programs, recruitment, and organizational studies.



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Armed with her Bachelor of Business Administration degree, and as a CPA (Certified Public Accountant), Katie began her career in an international accounting/consulting firm. She transitioned into Human Resources within the firm to become the Human Resources Director of the San Francisco office. She next moved into the high-tech industry where she served in leadership positions for high-growth companies, startup firms, and organizations in transition. Katie then moved to the public sector, joining K&A in 2003 and has been the firm's President since 2005; over the last fifteen (15) years, she has overseen hundreds of compensation, classification, organizational and other studies for cities, counties, and special districts throughout California.

Agencies for whom classification and/or compensation studies, or HR Services (such as organizational assessments, executive performance evaluations, etc.) were led by Katie, as Project Director, during the past two and one half ( 2 ½ ) years, include, but are not limited to, the following:

- **Cities:** Calistoga, Carmel, Coachella, Crescent City, Cupertino, Dinuba, Fairfield, Galt, Hayward, Morgan Hill, Newman, Palo Alto, Piedmont, Sacramento, San Pablo, Santa Rosa, Seaside, Sonoma, Tracy.
- **Counties:** El Dorado and Merced.
- **State:** California State Compensation Insurance Fund; California State Auditor's Office.
- **Special Districts:** California State Auditor's Office, Castro Valley Sanitary District, Central Fire District of Santa Cruz County, Coastside County Water District, Contra Costa County Employees' Retirement Association, Cosumnes Community Services District, Discovery Bay Community Services District, Dublin San Ramon Services District, East Palo Alto Sanitary District, Encina Waste Water Authority, Fairfield Suisun Sewer District, First 5 Santa Clara, Hartnell College, Indian Wells Valley Water District, Mendocino Coast Recreation & Park District, Midpeninsula Regional Open Space District, Monterey Regional Water Pollution Control Agency, Mt. View Sanitary District, Municipal Pooling Authority, North Coast County Water District, Northern California Power Agency, Oakland Housing Authority, Public Agency Risk Sharing Authority of California, Rancho Murieta Community Services District, Retirement Office of City of San José, Salinas Valley Solid Waste Authority, San Francisco County Transportation Authority, Santa Clara Valley Open Space Authority, Santa Clara Valley Water District, Solano Transportation Authority, Sonoma County Open Space District, Southwestern Community College District, Superior Court of San Joaquin County, Travis Unified School District, West Valley Sanitation District of Santa Clara County.

Katie will be key personnel and serve as the Project Director for this project; she will coordinate all of K&A's efforts, will attend all meetings with the District, and will be responsible for all work products and deliverables.

**Debbie Owen, CCP**  
**Senior Project Manager**

Debbie has over twenty (20) years of experience providing classification and compensation consulting services to public sector agencies; she has worked with clients across local government including cities, counties, special districts, and transit agencies. Her project roles include serving in the capacity of either



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project team member or project manager. Prior to beginning her public-sector consulting career, Debbie worked as a Compensation and Benefits Specialist in the private sector for five (5) years.

In 1992, Debbie obtained her certification as a Certified Compensation Professional (CCP) from the American Compensation Association (now *WorldatWork*); to ensure current knowledge of compensation and benefits program trends and best practices, she maintains active membership in the *WorldatWork* organization.

Her specialized, diverse experience includes serving as a project team member on classification projects by facilitating employee orientation sessions, conducting employee job evaluation meetings, researching/evaluating classification concepts, analyzing data for employee allocations, developing/revising classification specifications and preparing classification reports. Her compensation experience includes base salary or total compensation survey development, labor market agency research and recommendations, comparable agency job matching, compensation data analysis, salary recommendations and preparing compensation reports.

In addition to serving as a team member, Debbie has often served as a project manager, working with clients to evaluate their classification and compensation needs, directing the work of teams to provide high quality deliverables consistent with best practices, presenting study findings to client stakeholders, and addressing feedback from the client.

Debbie has worked on classification and/or compensation studies for the following agencies, either as Co-Project Director or as Sr. Project Manager:

- **Cities:** Campbell (included an FLSA Analysis); Coachella; Murrieta; Redwood City; National City; Newman; Palm Desert; and San Jose (Retirement Agency).
- **Counties:** El Dorado; Mendocino; and Trinity.
- **Special Districts:** Alameda-Contra Costa Transit; Beaumont-Cherry Valley Water District; Contra Costa County Employee Retirement System; Eastern Municipal Water District; El Dorado County Transportation Authority; El Dorado Hills Community Services District; Housing Authority of Santa Clara County; Livermore Area Recreation and Parks District; Napa Sanitation; Riverside Community College District; SFBAWETA (San Francisco Bay Area Water Emergency Transportation Authority; Sonoma County Water Agency; Sweetwater Authority; Trabuco Canyon Water District (incl. an FLSA Analysis); Truckee Sanitary District; and Western Municipal Water District (retirement system practices survey).

Debbie will provide consultant support for this project, including compensation analysis, internal job analysis, development of recommendations, and implementation strategies.

### **Monica Garrison-Reusch, B.A., M.B.A.** **Senior Consultant**

Monica has over thirteen (13) years of human resource program experience, all of which have been spent serving as either a team consultant or project manager on projects working with public sector agencies.



## Compensation and Benefits Study Proposal Groveland Community Services District

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Monica's primary professional focus over the last several years has been on classification and compensation practices.

Prior to joining K&A, Monica performed classification and compensation consulting services as either a team member or project manager on varied projects including large scale studies done for the Counties of Madera, Sacramento, Bernalillo (in New Mexico), and the California State Department of Personnel Administration. Monica also developed and served as a Co-Trainer for a two-day course on Classification and Compensation.

Monica's depth of experience allows her to provide a broad range of human resources services to public agencies. She specializes in compensation projects focusing on both base salary and total compensation analysis studies. Monica has also worked on project teams conducting classification studies and organizational analysis, including performing the full range of classification analysis and conducting in-depth survey and analysis of organizational structures and past organizational practices.

Since joining K&A, Monica has worked on studies for the following clients:

- **Cities:** Cotati, Crescent City, Pleasant Hill, Sacramento, and Vallejo.
- **Counties:** El Dorado, Mendocino, and Trinity.
- **State:** California State Auditor's Office.
- **Special Districts:** AC Transit, Cosumnes Community Services District, EBMUD (East Bay Municipal Utility District), Eastern Municipal Water District, El Dorado County Transit Authority, First 5 Contra Costa County, First 5 Santa Clara County, Livermore Amador Valley Transit Authority, Mojave Water Agency, Orange County Transportation Authority, State Water Contractors, and Trabuco Canyon Water District.

She earned an MBA with an emphasis in Marketing at Golden Gate University and a Bachelor of Science in Business Administration from the University of Southern California.

Monica will provide consultant support for this project, including compensation analysis, internal job analysis, development of recommendations, and implementation strategies.



## CONSULTANT QUALIFICATIONS & REFERENCES

*(K&A staff assignments are shown for recent projects below)*

| Agency & Project  | Contact  |
|---|--|
| <p><b>Cosumnes Community Services District</b></p> <p>Classification (18 classes, 40 positions) and Compensation Study (45 classes, 12 comparators), completed 2016.</p> <ul style="list-style-type: none"> <li>➤ K&amp;A Staff: Katie Kaneko (President), Anne Hayes, Monica Garrison-Reusch</li> </ul>  | <p><b>Mr. Jeff Ramos</b><br/>General Manager<br/>(916) 405-7150<br/>9355 E. Stockton Blvd., Suite 205<br/>Elk Grove, CA 95624<br/><a href="mailto:jefframos@yourcsd.com">jefframos@yourcsd.com</a></p>           |
| <p><b>Desert Recreation District</b></p> <p>Total Compensation Study, completed 2016.</p> <ul style="list-style-type: none"> <li>➤ K&amp;A Staff: Georg Krammer (CEO), Tameka Usher, Alyssa Thompson, Anne Hayes, Katie Lee</li> </ul>  | <p><b>Mr. David Corey</b><br/>Director of Finance and Administration<br/>(760) 347-3484<br/>45-305 Oasis St.<br/>Indio, CA 92201<br/><a href="mailto:dcorey@drd.us.com">dcorey@drd.us.com</a></p>                |
| <p><b>Discovery Bay Community Services District</b></p> <p>Classification and Compensation Study, completed 2016.</p> <ul style="list-style-type: none"> <li>➤ K&amp;A Staff: Katie Kaneko, Alyssa Thompson</li> </ul>  | <p><b>Ms. Sue Heinel</b><br/>Executive Assistant<br/>(925) 634-1131<br/>1800 Willow Lake Road<br/>Discovery Bay, CA 94505<br/><a href="mailto:sheinel@todb.ca.gov">sheinel@todb.ca.gov</a></p>                   |
| <p><b>Dublin San Ramon Services District</b></p> <p>Classification and Compensation Study, currently underway.</p> <p>Between 2008 and 2017, we have provided multiple single-classification studies, recruitments, and special project support.</p> <p>Classification and Compensation Study, completed 2008.</p> <ul style="list-style-type: none"> <li>➤ K&amp;A Staff: All projects for DSRSD are directed by Katie Kaneko, and various K&amp;A staff are assigned to work with her based on current K&amp;A workload.</li> </ul> | <p><b>Ms. Michelle Gallardo</b><br/>Organizational Services Manager<br/>(925) 875-2290<br/>7051 Dublin Boulevard<br/>Dublin, CA 94568<br/><a href="mailto:gallardo@dsrsd.com">gallardo@dsrsd.com</a></p>         |
| <p><b>El Dorado County Transit Authority</b></p> <p>Classification and Total Compensation Study, completed 2017.</p> <ul style="list-style-type: none"> <li>➤ K&amp;A Staff: Debbie Owen, Monica Garrison-Reusch</li> </ul> <p>Total Compensation Study, completed 2014.</p>  | <p><b>Ms. Mindy Jackson</b><br/>Executive Director<br/>(530) 642-5383<br/>6565 Commerce Way<br/>Diamond Springs, CA 95619<br/><a href="mailto:MJackson@eldoradotransit.com">MJackson@eldoradotransit.com</a></p> |



**Compensation and Benefits Study Proposal**  
**Groveland Community Services District**

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|---|---|
| <p><b>El Dorado Hills Community Services District</b></p> <p>Classification and Compensation Study, completed 2017.</p> <ul style="list-style-type: none"> <li>➤ K&amp;A Staff: Katie Kaneko, Debbie Owen, Anne Hayes</li> </ul> <p>Classification and Compensation Study, 2015-2016.</p> | <p><b>Mr. Kevin Loewen</b><br/>         Director of Administration &amp; Finance<br/>         (916) 614-3234<br/>         1021 Harvard Way<br/>         El Dorado Hills, CA 95762<br/> <a href="mailto:Kloewen@edhcsd.org">Kloewen@edhcsd.org</a></p> |
| <p><b>Hayward Area Recreation and Park District</b></p> <p>Compensation Study, completed 2017.</p> <ul style="list-style-type: none"> <li>➤ K&amp;A Staff: Georg Krammer, Alyssa Thompson, Katie Lee</li> </ul>   | <p><b>Mr. Paul McCreary</b><br/>         General Manager<br/>         (510) 881-6710<br/>         1099 E St.<br/>         Hayward, CA 94541<br/> <a href="mailto:mccp@haywardrec.org">mccp@haywardrec.org</a></p>                                     |
| <p><b>Heritage Ranch Community Services District</b></p> <p>Classification and Total Compensation Study, completed 2016.</p> <ul style="list-style-type: none"> <li>➤ K&amp;A Staff: Georg Krammer, Alyssa Thompson</li> </ul>  | <p><b>Mr. John D’Ornellas</b><br/>         General Manager<br/>         (805) 227-6230<br/>         4870 Heritage Road<br/>         Paso Robles, CA 93446<br/> <a href="mailto:john@heritageranchcsd.com">john@heritageranchcsd.com</a></p>           |
| <p><b>Incline Village General Improvement District</b></p> <p>Total Compensation Study, completed 2017.</p> <ul style="list-style-type: none"> <li>➤ K&amp;A Staff: Georg Krammer, Alyssa Thompson, Susan Vang</li> </ul>   | <p><b>Mr. Curtis Trujillo</b><br/>         Sr. H.R. Analyst/Risk Management<br/>         (775) 832-1263<br/>         893 Southwood Blvd.<br/>         Incline Village, NV 89451<br/> <a href="mailto:cgt@ivgid.org">cgt@ivgid.org</a></p>             |
| <p><b>Livermore Area Recreation and Park District</b></p> <p>Classification Study, completed 2016.</p> <ul style="list-style-type: none"> <li>➤ K&amp;A Staff: Katie Kaneko, Debbie Owen</li> </ul>   | <p><b>Ms. Denise Deprato</b><br/>         HR Manager<br/>         (925) 373-5705<br/>         4444 East Avenue<br/>         Livermore, CA 94550<br/> <a href="mailto:ddeprato@larpd.org">ddeprato@larpd.org</a></p>                                   |
| <p><b>Mendocino Coast Recreation &amp; Parks District</b></p> <p>Classification and Compensation Study, completed 2016.</p> <ul style="list-style-type: none"> <li>➤ K&amp;A Staff: Katie Kaneko</li> </ul>   | <p><b>Mr. Dan Keyes</b><br/>         District Administrator<br/>         (707) 964-9446, Ext 102<br/>         300 S. Lincoln St.<br/>         Fort Bragg, CA 95437<br/> <a href="mailto:dkeyes@MCRPD.US">dkeyes@MCRPD.US</a></p>                      |
| <p><b>Mountain House Community Services District</b></p> <p>Classification and Compensation Study, completed 2014.</p> <ul style="list-style-type: none"> <li>➤ K&amp;A Staff: Katie Kaneko</li> </ul>  | <p><b>Mr. Gabriel Karam</b><br/>         Interim General Manager<br/>         (209) 831-5656<br/>         230 South Sterling Dr., Suite 100<br/>         Mountain House, CA 95391<br/> <a href="mailto:gkaram@sjgov.org">gkaram@sjgov.org</a></p>     |



Compensation and Benefits Study Proposal  
Groveland Community Services District

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| <p><b>Rancho Murieta Community Services District</b></p> <p>Total Compensation Study (16 benchmarks, 13 comparators), completed 2017.</p> <ul style="list-style-type: none"><li>➤ K&amp;A Staff: Katie Kaneko, Charles Sterling, Anne Hayes, Brenna Huntley</li></ul> <p>360 Degree Feedback Survey, completed 2013.</p> <p>Developed Performance Management Program, completed 2012.</p> <p>District-wide Total Compensation study, completed 2011.</p> | <p><b>Ms. Darlene J. Thiel</b><br/>General Manager<br/>(916) 354-3700<br/>15160 Jackson Road<br/>Rancho Murieta, CA 95683<br/><a href="mailto:dthiel@ranchomurieta.com">dthiel@ranchomurieta.com</a></p> |
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## COST PROPOSAL

We have often found our process requires a very high level of time commitment, which sometimes results in a higher proposal cost. We believe that our methodology and implementation success rate is attributable to the significantly greater level of contact we have with management, governing body, and staff. The time we commit to working with the employees (orientations and briefings, meetings with employees via personal interviews, informal appeal process, etc.) results in significantly greater buy-in throughout the process and no formal appeals at the end of the study.

In fact, our firm has never had a formal appeal to any of our studies in our more than 34 years in business. It has been our experience that the money and time invested in stakeholder communication throughout the study are money and time saved during implementation. Numerous times our firm has been hired after an agency has gone through an unsuccessful study whose results were rejected or appealed and whose implementation was very controversial. The result was a divided organization with hostility and animosity between employees/employee representation and management. Whenever our firm was hired after such an unfortunate experience, study stakeholders were amazed at our open and all-inclusive process, our efforts to elicit equal stakeholder input, and our development of recommendations that were accepted as fair and reasonable and understood by management, employees, and the governing body.

Our success rate is also attributable to the fact that we have over 34 years of experience working with employees of all types of backgrounds, educational levels, and work experiences, and we are accustomed to successfully communicating with and educating them throughout the process. It is imperative that all employees eventually buy into the study results and recommendations, whether they have been through a process like this before or whether this is the first time for them.

Our clients always provide feedback that our process was professional, comprehensive, understandable, timely, and inclusive. Employees, although not necessarily always happy with our recommendations, have always indicated that we listened to their issues and concerns and were available for discussion, as required. Although time consuming, we also drive the process to ensure that timelines are met and schedules are maintained.

| Deliverables | Compensation & Benefits Study  | Hours |
|--------------|--|-------|
| A.           | Meetings with the Study Project Team and Management Staff for Review of Process, Products and Documents Required (suggest conference call to expedite the process) | 8     |
| B.           | List of Comparator Agencies, Benchmark Classifications, and Benefits to be Collected   | 12    |
| C.           | Data from Comparators (assumes 11 benchmarks and up to 10 comparators)   | 40    |
| D.           | Analysis and Preliminary Review of Data (assumes 11 benchmarks and up to 10 comparators)   | 20    |
| E.           | Draft Compensation Findings/Additional Analysis/Study Project Team Meeting (suggest conference call to expedite the process)                                       | 12    |
| F.           | Analysis of Internal Relationships and Alignment   | 4     |
| G.           | Compensation Structure and Implementation Plan   | 10    |





**Compensation and Benefits Study Proposal**  
**Groveland Community Services District**

|    |   |                 |
|----|---|-----------------|
| H. | Final Report and Guidelines for Implementation  | 12              |
| I. | Formal Appeals Support *  | 0               |
| J. | Final Presentation  | 8               |
|    | <i>Anticipated hours for additional unscheduled meetings and phone calls</i>  | 5               |
|    | <b>Total Professional Hours</b>   | <b>131</b>      |
|    | Combined professional and clerical composite rate: <b>\$134/Hour</b>  | <b>\$17,554</b> |
|    | Expenses <b>are included</b> in our combined composite rate:  | <b>N/A</b>      |
|    | <i>Expenses include but are not limited to duplicating documents, binding reports, phone, fax, supplies, postage, travel expenses, per diem, etc.</i> |                 |
|    | <b>TOTAL NOT-TO-EXCEED COST FOR PROJECT:</b>  | <b>\$17,554</b> |
|    | *Additional consulting will be honored at composite rate ( <b>\$134/Hour</b> )  |                 |

**Note: We bill “in arrears” – we bill in the first week of the month following the month in which we provide services. If we begin the project in August, our first invoice would arrive by email in early September. Work completed in September will be billed during the first week of October. Our terms are Net-30.**

### Contractual Requirements

We will be pleased to sign a contract for this study should we be the fortunate recipient of the award for this project.

### Insurance Acknowledgement

We will submit and support the levels of coverage and endorse the City with our General Liability coverage upon award of a contract for the project.

|  |                            |
|--|----------------------------|
| Workers’ Compensation:                       | Statutory Limits           |
| Commercial General Liability:                | \$2,000,000 per occurrence |
| Professional Liability (Errors & Omissions): | \$1,000,000 per occurrence |
| Automobile Insurance:                        | \$1,000,000 per occurrence |

Our insurance broker is Ms. Eileen Hollander, Sr. Account Manager/Commercial Lines, Integro Insurance Brokers, 2300 Contra Costa Blvd., Suite 375, Pleasant Hill, CA 94523.



## Signature Page

Koff & Associates intends to adhere to all of the provisions described in the RFP.

This proposal is valid for at least sixty (60) days.

Respectfully submitted,

By: KOFF & ASSOCIATES  
State of California

Georg S. Krammer  
Chief Executive Officer

July 27, 2018

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## **APPENDIX**

### **Résumés of Participating Staff**

## Catherine B. Kaneko

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### SUMMARY

President of Koff & Associates, with experience in managing the planning, development, implementation, and administration of compensation programs, including stock plans, benefits administration, variable pay programs, performance management and employee development, strategic planning, and policy development.

### KEY ACHIEVEMENTS AND HIGHLIGHTS

Evaluated, designed, and implemented step system and broadband compensation structures for public agencies and private companies, which accomplished organization goals of controlling costs, attracting and retaining key talent, and ease of administration. Managed and developed organization-wide classification systems. Designed and implemented incentive and variable pay programs. Designed performance appraisal systems. Integrated career management programs with compensation, reward and recognition, promotion, transfer, and training strategies, processes, and procedures. Developed strategic business plans. Developed and implemented multiple training programs.

### PROFESSIONAL EXPERIENCE

#### *Koff & Associates, Berkeley, CA*

**Associate and Senior Project Manager, 2000-2005**

**President, 2005-Present**

- Serve as project director in conducting hundreds of classification, compensation, and organizational studies; provide strategic planning services for agencies; provide offsite human resource function; recruit executive level positions for special districts, courts, counties, cities and other statewide and local agencies.
- Develop complex, detailed proposals for cities, counties, courts, and special districts, such as housing, school, healthcare, air quality, vector control, transportation, water, and wastewater agencies to provide professional Human Resources consulting services.
- Represent Koff & Associates with clients, write and approve final project reports and lead presentations in front of City Councils, Boards of Commissioners, Boards of Supervisors, and Boards of Directors.
- Manage and develop staff of project managers, data specialists, firm associates, marketing and administrative analysts in Berkeley office and work closely with Senior Project Manager in San Diego office.
- Grew company from serving approximately 100 clients to 250 clients and grew staff from 4 to 14 in period of ten years.
- Contributed to and maintained 100% successful implementation rate of studies performed for clients.

#### *Xpedior, San Francisco, CA*

**Human Resources Director, 1997-2000**

- Managed acquired companies to the Xpedior culture. Audited human resources practices of acquired companies and provided training and guidance to management. Ensured compliance with organization policies and procedures.
- Oversaw conversion to IPO environment in terms of the impact on human resources functions.
- Managed all human resources programs, including organization development, recruitment and selection, labor law compliance, classification and compensation, benefits administration, employee relations, training and development, and safety programs.

***SEGA of America, Redwood City, CA***

**Human Resources Generalist, 1993-1996**

**Compensation Manager, 1996-1997**

- Managed compensation function for over 1,000 employees. Evaluated, designed, and implemented broadband compensation structure which accomplished corporate goals of controlling costs, attracting and retaining key talent, and ease of administration. Developed and conducted the manager and employee training/communications program for new broadband system.
- Managed the production of over 250 job descriptions for the entire organization.
- Designed new corporate incentive plans for Research and Development and Sales divisions.
- Functioned as project lead for conversion and installation of new HRIS system.
- Obtained and compiled high-tech market data to support the organization's competitive advantage in a cutting edge industry.
- Managed the human resources function for the U.S. satellite software development divisions and companies (over 450+ employees).
- Consulted with managers and employees on organization development, conflict resolution, performance management, discipline, termination, and other employee relations issues.
- Assimilated acquired companies to the SEGA culture. Audited human resources practices of acquired companies and provided training and guidance to management. Ensured compliance with organization policies and procedures.

***TPA Company, San Francisco, CA***

**Human Resources Manager/Financial Controller, 1992-1993**

- Managed human resources function. Evaluated and implemented new policies and procedures to strengthen organization structure. Supervised and maintained financial accounting operations. Position encompassed diverse responsibilities in a high-pressure, fast paced environment.

***BDO Seidman, CPA's and Consultants, San Francisco, CA***

***Laventhol & Horwath, CPA's and Consultants, San Francisco, CA***

**Human Resources Director, 1986-1992**

- Managed human resources, organization development, employment, labor law, compensation, benefits administration, affirmative action, employee relations, and safety programs.

**EDUCATION & CERTIFICATIONS**

**BS – Business Administration: California State University, Hayward**

**CPA – Certified Professional Accountant**

**PHR – Professional Human Resource Certificate**

**PROFESSIONAL AFFILIATIONS**

- California Public Employer Labor Relations Association
- National Public Employer Labor Relations Association
- Public Employer Labor Relations Association of California
- International Public Management Association
- Society of Human Resource Management
- Northern California Human Resource Association
- California Chamber of Commerce

## Debbie Owen

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### KEY ACHIEVEMENTS AND HIGHLIGHTS

- Classification and compensation practitioner/team member providing classification and compensation services to public sector agencies; extensive analytical experience in classification, compensation, and technical report writing.
  - Specific areas of expertise include job classification and total compensation (base salary and benefits) program review, analysis, design, development and implementation.
- Experienced project manager serving public sector clients on a wide range of classification and compensation studies by working with client stakeholders, directing the work of project teams to ensure high quality study deliverables, and preparing/delivering study presentations to client stakeholders.
- Certified Compensation Professional (CCP) status attained in 1992 with continued membership in *WorldatWork*.

### PROFESSIONAL EXPERIENCE

#### **Koff and Associates, Berkeley, CA** **Senior Project Manager – September 2015**

- Project team member providing classification, compensation analysis and technical report development support for classification and base salary/total compensation studies.
- Compensation related duties include conducting salary surveys; compensation and benefits data analysis and reporting; conducting external market and internal equity analyses; preparing salary recommendations, and writing technical reports.
- Classification related duties include conducting job evaluation meetings, determining classification concepts, preparing allocation recommendations, developing/revising classification specifications and writing technical reports.

#### **CPS Human Resource Consulting Services** **May, 2003 - June, 2015**

- Technical Specialist Classification and Compensation
- Practice Leader
- Manager, Retention and Deployment Services
- Principal Consultant
- Project Consultant/Senior Consultant

Multiple roles within the organization, with focus on serving as a team member or project manager responsible for providing human resources consulting services to public sector agencies including cities, counties, utilities, special districts, transit agencies and other local government clients. Projects included large and complex base salary and total compensation survey data reporting, as well as job evaluation/classification studies involving multiple classifications and employees.

- Project team consultant responsibilities:
  - Compensation - conducting salary surveys for large and small compensation studies; study tasks included labor market selection; survey development; compensation and benefits data analysis and reporting; internal equity alignment; and developing salary recommendations and compensation reports.
  - Classification - conducting study briefing and de-briefing sessions, and employee interviews for job evaluation/classification purposes; developing classification structures; preparing classification specifications for a broad and diverse range of jobs; and developing classification reports.
- Project management responsibilities include strategic planning in the development of project scope and budget; managing the work of professional consulting staff assigned to projects; preparing for, and conducting, client meetings and presentations for stakeholders including employees, bargaining unit representatives, management and governing boards; ensuring that project staff are properly deployed based upon tasks to be completed and individual skillsets; and confirming that all study analyses, reports and other deliverables are of high quality and aligned with professional standards
- Serving as a technical expert in classification and compensation, acting as a resource to colleagues; and developing modules for classification and compensation related training programs delivered to staff and clients.

**Ralph Andersen & Associates/Johnson & Associates**

**June, 1995 – March, 2003**

Senior Consultant and Staff Consultant providing human resources consulting services to public sector agencies including cities, counties, utilities, special districts, transit agencies and other local government clients. Served as a team member or project manager responsible for:

- Conducting salary surveys for large and small compensation studies; study tasks included labor market selection, survey development, compensation and benefits data analysis and reporting; internal equity analyses (including point factor); salary recommendations, and cost implementation.
- Conducting study briefing and de-briefing sessions, and employee interviews for job evaluation/classification projects; developing classification structures; and preparing classification reports, classification specifications/job descriptions for a broad and diverse range of jobs.

**EDUCATION**

- Pierce College, Athens, Greece
- *WorldatWork* Certification as a Compensation Professional (CCP) - 1992
- University of California Extension Program courses in human resources and labor-management relations

**PROFESSIONAL AFFILIATIONS**

- Member, *WorldatWork*

## **MONICA GARRISON REUSCH**

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### **PROFESSIONAL SUMMARY:**

#### **April 2016 – Present**

##### **Senior Consultant, *Koff & Associates, Berkeley CA***

- Provide support on classification and compensation studies for public sector clients, including cities, counties and special districts.
- Compensation studies: data collection and analysis; develop compensation recommendations and implementation plans.
- Participate in special projects, including recruitment, pay for performance program development and training, audits, and other special projects.

#### **November 2003 - March 2016, *CPS HR Consulting, Sacramento CA***

Held several roles within the organization, with main focus serving as a team member responsible for providing human resources consulting services to public sector agencies including cities, counties, utilities, special districts, transit agencies and other local government clients.

Projects included large and complex base salary and total compensation survey data reporting, as well as job evaluation/classification studies involving multiple classifications and employees.

#### **Project Consultant, July 2006 – March 2016, *CPS HR Consulting, Sacramento CA***

- Conducted salary and benefit surveys for large and small compensation studies. Study tasks included labor market selection; survey development; compensation and benefits data analysis and reporting; internal equity alignment; and developing salary recommendations and compensation reports.
- Conducted study briefing and debriefing sessions, and employee interviews for job evaluation/classification purposes.
- Served as project consultant, lead or managed small, medium and large scale compensation projects for public sector agencies including, state agencies, counties, cities and special districts.
- Specialized in compensation projects focusing on both base salary and total compensation analysis studies.
- Participated on project teams for both large and small scale compensation studies, including large studies performed for the following agencies: Madera County, Sacramento County, Sacramento Municipal Utility District.
- Served as lead consultant on studies including work done for the San Diego Association of Government's ("SANDAG"), Bernalillo County, New Mexico, and large statewide total compensation studies performed for the State of California.
- Training and facilitation experience included developing training materials and training public employees at varying levels on classification and compensation topics.



**Technician/ Internal Consultant, November 2003 – June 2006, CPS HR Consulting**

- Developed responses to requests for proposals and assisted in the management of the proposal process.
- Provided technical support on both compensation and classification projects through the data collection process.
- Served as the assigned consultant and internal personnel officer for several California counties social services and child support departments through the Merit System Contract providing full HR generalist support functions.

**EDUCATION:**

**University of Southern California, Los Angeles**

Bachelor's Degree, Business Administration with an emphasis in entrepreneurship.

**Golden Gate University, Sacramento CA**

MBA with an emphasis in marketing.