



## Evergreen Solutions, LLC

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May 20, 2025

Kelsey Wagoner  
Human Resources Director  
Ashe County  
150 Government Circle, Suite 250  
Jefferson, North Carolina 28640

SUBMITTED VIA EMAIL: [kelseywagoner@ashecountygov.com](mailto:kelseywagoner@ashecountygov.com)

Dear Ms. Wagoner:

We appreciate the opportunity to submit a letter proposal to conduct a Staffing Study for Ashe County. I have prepared a work plan outlining the tasks, activities, and milestones necessary to accomplish this study as well as a proposed timeline and cost.

### Detailed Work Plan

#### Task 1.0 Project Initiation

##### TASK GOALS

- Finalize the project plan with the County.
- Finalize any remaining contractual negotiations.
- Establish an agreeable final timeline for all project milestones and deliverables.

##### TASK ACTIVITIES

- 1.1 Meet with the County's Project Manager (CPM) and other key staff to discuss the following objectives:
  - understand the County's mission and current strategic plan (if any);
  - review our proposed methodology, approach, and project work plan to identify any necessary revisions;
  - reach agreement on a schedule for the project including all assignments and project milestones/deliverables; and
  - establish an agreeable communication schedule.
- 1.2 Identify potential challenges and opportunities for the study. Discuss the strategic direction of the County and some of the short and long-term priorities. This activity serves as the basis for assessing where the County is going and the major operational needs.

Task 2.0  
Data Collection

- 1.3 Discuss the project critical path and methods for addressing project challenges.
- 1.4 Review and edit the project work plan and submit a schedule for the completion of each project task.

KEY PROJECT MILESTONE

- Comprehensive project management plan

TASK GOALS

- Collect and review existing studies, reports and other pertinent data.
- Identify strategic needs and service areas.
- Identify concerns and clarify duties and responsibilities within the County.

TASK ACTIVITIES

- 2.1 Meet with the CPM and determine available and/or previously collected resources.
- 2.2 Obtain and analyze reports and background materials pertinent to the study, including:
  - strategic plan, mission, vision, goals, objectives and performance standards;
  - position descriptions;
  - organization charts and flow charts of work processes;
  - current and prior year's budgets (previous two years);
  - independent financial audits;
  - recent financial audits and internal audit reports;
  - expenditure reports;
  - staffing data that reflects resource allocation and utilization;
  - administrative and financial policies, procedures and practices;
  - personnel policies, procedures and practices;
  - current workload and workload trend information;



Task 3.0  
Document and  
Review Existing  
Operations

- service level reports including performance measures;
- outcome measures, KPI (Key Performance Indicators), and operating statistics;
- employee database, including name, department, unit, compensation, tenure, performance, training, and other incumbent details; and
- other relevant data that may impact the findings and conclusions of this study.

- 2.3 Create a draft list of strategic needs and service areas for the County and share with the CPM.
- 2.4 Revise the draft list of strategic needs and service areas based on feedback from the CPM.

KEY PROJECT MILESTONES

- Collection of existing data pertinent to this study
- Summary of high-level strategic needs and services areas

TASK GOALS

- Review current operations.
- Identify functional areas and major programs.

TASK ACTIVITIES

- 3.1 Assign functional areas and major programs to the specific strategic needs and service areas and weight the allocated resources. Review the associated activities for consistency and feasibility.
- 3.2 Collect current Key Performance Indicators (KPIs) and other outcome-related data.
- 3.3 Prepare and submit summary of findings highlighting strategic needs, major services areas, functional areas, and major programs.
- 3.4 Discuss the results with the CPM and other key staff associated with the project to validate the results.

KEY PROJECT MILESTONES

- Summary of KPIs and outcome measures
- Preliminary summary of operations
- Completion of major sections of the service model



Task 4.0  
Develop and Collect  
Staffing and Outcome  
Survey

TASK GOALS

- Identify peers to include in benchmark comparison.
- Analyze peer data to determine the relevant staffing range for each department/function, service, and level.
- Create a document that summarizes requirements and operational expectations.

TASK ACTIVITIES

- 4.1 Discuss with the CPM the plan for collecting benchmark data from peers.
- 4.2 Develop and issue benchmarking survey to collect level, staffing, and KPI results from relevant peer organizations.
- 4.3 Review the comparability of KPI and outcome data and follow-up with peers when necessary.
- 4.4 Validate the peer data and conduct any follow-up work to verify information submitted to ensure a high level of comparability.
- 4.5 Develop a peer staffing matrix based on KPI and/or outcome measure variation that includes the expected staffing range by job level.

KEY PROJECT MILESTONES

- Benchmark survey document
- Benchmark survey results
- Peer staffing matrix based on KPI
- Survey of KPI results

Task 5.0  
Conduct Staffing  
and KPI Analysis

TASK GOALS

- Evaluate and assess the County's overall organizational structure and staffing levels in each department.
- Compare staffing and KPI data from other similar entities.
- Recommend appropriate staffing level.



Task 6.0  
Report Results

TASK ACTIVITIES

- 5.1 Utilize comparison data from benchmark survey peers in the Peer Staffing Matrix to assess organizational structure and staffing levels.
- 5.2 Identify jobs by level that fall outside of the estimated staffing thresholds.
- 5.3 Develop staffing model based on current strategic needs, comparison of KPI results, and peer thresholds.
- 5.4 Validate staffing model based on KPI goals.
- 5.5 Prepare summary of findings to the CPM and HR team. Identify areas needing improvement.

KEY PROJECT MILESTONES

- Staffing model analysis
- Proposed staffing model

TASK GOALS

- Review results and develop recommendations.
- Report on results.

TASK ACTIVITIES

- 6.1 Review findings from the previous tasks.
- 6.2 Create a matrix that identifies all gaps between the current and desired staffing by level and functional area of the County.
- 6.3 Estimate the overall resource and cost savings for each change or gap based on the current and proposed staffing model.
- 6.4 Write recommendations and action plans for each change.
- 6.5 Create a draft report that summarizes results and links recommendations and outcomes from the study.
- 6.6 Discuss the recommendations with the CPM and provide a briefing to other stakeholders (i.e., Leadership) as designated.
- 6.7 Assemble the final report based on feedback from the County.
- 6.8 Deliver final presentation of results.



#### KEY PROJECT MILESTONES

- Gap analysis matrix
- List of potential recommendations
- Draft and final report

#### Proposed Cost and Timeline

Our total, not-to-exceed, fixed cost to complete all tasks in our work plan is \$52,500. Our cost is all inclusive, and includes travel costs (meals and lodging), transportation, fringe benefits, indirect cost (overhead), clerical support, and all other out-of-pocket expenses. Evergreen can conduct this study in approximately three months from the execution of a contract. Our cost includes two onsite visits to the County to perform the work as most of the work can be conducted virtually.

Our preferred method of invoicing is as follows:

- 33% - upon completion of Tasks 1 – 2
- 33% - upon completion of Tasks 3 – 4
- 34% - upon completion of Tasks 5 – 6

We would love the opportunity to again work with Ashe County. If you need any additional information, please feel free to contact me at (850) 383-0111 or via email at [jeff@consultevergreen.com](mailto:jeff@consultevergreen.com).

Sincerely,



Jeffrey Ling, PhD, President  
Evergreen Solutions, LLC



## Kelsey Wagoner

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**From:** David Hill <dhill@ptrc.org>  
**Sent:** Wednesday, June 25, 2025 4:21 PM  
**To:** Kelsey Wagoner  
**Subject:** Performance Study

Good Afternoon Kelsey,

Your anticipated study, especially the efficiency component, is difficult to gauge. We would need a deep dive into the specific duties/responsibilities/authorities assigned to each employee's position.

If I remember correctly, you had a pay/class study completed two or three years ago - do you have the Position Description Questionnaires that each employee completed for your pay/class study? If so, those questionnaires could provide us excellent information regarding each position. We will still want to conduct "desk audits" where we meet with employees and watch their daily flow of activity to determine if there are more efficient ways of performing their job. The desk audit also gives us insight into how employees use their time. The other components of your anticipated study are not as detailed as the efficiencies study.

With that said, a fee range is a minimum of \$25,000 with a not to exceed amount of \$40,000.

After your consideration I look forward to continued discussion.

David  
828-292-1601



**David Hill**

Piedmont Triad Regional Council

865.951.1700 | [www.ptrc.org](http://www.ptrc.org)

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**From:** Kelsey Wagoner <kelseywagoner@ashecountygov.com>  
**Sent:** Wednesday, June 25, 2025 9:23 AM  
**To:** David Hill <dhill@ptrc.org>  
**Subject:** RE: Performance Study

**CAUTION:** This email originated from outside of the PTRC. Do not click on links or open attachments unless you recognize the sender and know the content is safe.

No problem at all! I just wanted to make sure that I hadn't missed any emails from you. Thank you for getting back to me so quickly!



**KELSEY WAGONER**  
BS, MHA

**Human Resources Coordinator**

336-846-5501 ext 5508

150 Government Circle Suite 2500  
Jefferson, NC 28540

kelseywagoner@ashcountygov.com

www.ashcountygov.com

From: David Hill <dhill@ptrc.org>  
Sent: Wednesday, June 25, 2025 9:22 AM  
To: Kelsey Wagoner <kelseywagoner@ashcountygov.com>  
Subject: Re: Performance Study

Good Morning Kelsey, my apologies - I've been working to finish up final stages of several pay/class studies I'm working on.

I should finish my today's "to do" list by mid afternoon and then I'll be back in touch with you.

David  
828-292-1601



**David Hill**

Piedmont Triad Regional Council

865.951.1700 | www.ptrc.org

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From: Kelsey Wagoner <kelseywagoner@ashcountygov.com>  
Sent: Wednesday, June 25, 2025 9:18 AM  
To: David Hill <dhill@ptrc.org>  
Subject: RE: Performance Study

**CAUTION:** This email originated from outside of the PTRC. Do not click on links or open attachments unless you recognize the sender and know the content is safe.

Hi David,

Just wanted to see if you had a chance to review.



**KELSEY WAGONER**  
BS, MHA

**Human Resources Coordinator**

336-846-5501 ext 5508

150 Government Circle Suite 2500  
Jefferson, NC 28540

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**From:** Kelsey Wagoner  
**Sent:** Wednesday, June 11, 2025 2:25 PM  
**To:** 'David Hill' <dhill@ptrc.org>  
**Subject:** RE: Performance Study

Hi David,

*Would your study include all departments/agencies/offices?*  
We would like to include all departments, if feasible to do so.

*How many position classification titles do you have?*  
Currently we have 147 classification titles. I have attached our job classification plan for your reference.

*How many full-time/part-time employees do you have?*  
Currently we have 239 FT employees and 41 PT employees.

*Have you previously used/currently use an evaluation system?*  
We have not previously used an evaluation system.

*What is your expected timeline for the study?*  
If possible, we would like to have the study completed by May 2026 in order to have recommendations for the 2026/2027 FY budget.

We are in the early stages of discussing this type of study. I know my answers are pretty vague but I honestly just don't know what would work best for our organization. If it would be more beneficial or helpful for you, I can set up a call or a Teams meeting.



**KELSEY WAGONER**  
BS, MHA

**Human Resources Coordinator**

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**From:** David Hill <dhill@ptrc.org>  
**Sent:** Wednesday, June 11, 2025 7:29 AM  
**To:** Kelsey Wagoner <kelseywagoner@ashecountygov.com>  
**Subject:** Performance Study

Good Morning Kelsey,

I'm following up regarding your interest in a study focused on performance improvement.

Would your study include all departments/agencies/offices?

How many position classification titles do you have?  
How many full-time/part-time employees do you have?  
Have you previously used/currently use an evaluation system?  
What is your expected timeline for the study?

For information, I worked 25 years for Caldwell County as HR Director and retired 12 years ago. I have worked for PTRC since my retirement and work from home in Lenoir (I'm one hour away from you).

I look forward continuing our discussion.

David  
828-292-1601



**David Hill**

Piedmont Triad Regional Council

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We are interested in doing a study that would evaluate a few items from a performance standpoint.

We would like to see:

- How employees use their time, identify areas where time may be wasted, identify areas where performance can be improved
- How many employees we actually need in different departments to do the assigned work
- Implementation of an evaluation system

Is this something that the PTRC could do? If so, could you send me more information along with a potential project cost?  
Thank you so much for your time.