

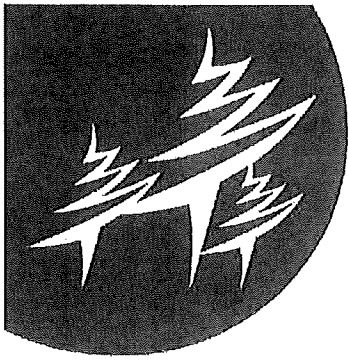
A Proposal to Conduct a  
Classification and Total Compensation Study  
for Ashe County, NC  
RFP #2023-001

ORIGINAL



Evergreen Solutions, LLC

October 31, 2023



## Evergreen Solutions, LLC

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October 27, 2023

Ms. Kelsey Wagoner  
Ashe County Human Resources  
150 Government Circle, Suite 2500  
Jefferson, North Carolina 28640

Dear Ms. Wagoner:

Evergreen Solutions, LLC is pleased to submit a proposal to conduct a Classification and Total Compensation Study for Ashe County. Our response is based on our review of your Request for Proposals (RFP #2023-01), our experience working with hundreds of local governments throughout the country, our understanding of the North Carolina labor market, and our knowledge of best practices in human resources management. **Evergreen is well qualified to provide the work being requested by Ashe County as we conducted more than 1,200 similar studies throughout the country.**

Evergreen Solutions was formed in 2004 to provide an alternative to traditional consulting firms. We provide an innovative and effective option by focusing on clients needing partners and not simply another service provider. Evergreen is authorized to transact business in the State of North Carolina under the name of Recio/Ling Consulting, LLC (i.e., 1654019).

As a national firm, Evergreen Solutions continues to grow, and our territory now includes clients in 47 states. In the State of North Carolina, Evergreen has been on contract or is currently on contract to work with the following public sector organizations in providing work similar in scope to the services being requested: Union County; Gaston County; New Hanover County; Guilford County; Transylvania County; Dare County; Jackson County; Franklin County; Vance County; Harnett County; Haywood County; Buncombe County; Town of Clayton; Town of Carrboro; City of Burlington; City of Southport; City of Raleigh; City of Fayetteville; City of Rocky Mount; City of Goldsboro; City of Hendersonville; City of Wilmington Housing Authority; Winston-Salem Housing Authority; Raleigh Housing Authority; State Employees Association of North Carolina; North Carolina League of Municipalities; Charlotte Water; Cape Fear Public Utility Authority; Alliance Health; Research Triangle Regional Transportation Authority (GoTriangle); Wake Technical Community College; Robeson Community College; Halifax Community College; Lincoln County Schools; Lee County Schools; Chatham Public Schools; Chapel Hill-Carrboro City Schools; and Cabarrus County Schools.

In other states, Evergreen has worked with, or is currently on contract to work with, the following local governments in a variety of human resources and management capacities: City of Baltimore, MD; City of Hyattsville, MD; City of Annapolis, MD; City of Hagerstown, MD; City of Westminster, MD; Talbot County, MD; Charles County, MD; Allegany County, MD; Washington County, MD; Howard County, MD; Prince George's County, MD; Kent County Levy Court, DE; City of Milford, DE; City of Newport News, VA; City of Suffolk, VA; City of Fredericksburg, VA; City of Norfolk, VA; City of Covington, VA; City of Williamsburg, VA; Town of Dumfries, VA; City of Falls Church, VA; Culpeper County, VA; County of York, VA; Gloucester County, VA; Essex County, VA; Surry County, VA; Isle of Wight County, VA; Prince George County, VA; James City County, VA; Louisa County, VA; Goochland County, VA; Loudoun County, VA; Spotsylvania County, VA; Northumberland County, VA; Bedford County, VA; Shenandoah County, VA; King George County, VA; Alleghany County, VA; City of Bennettsville, SC; City of Clemson, SC; City of Isle of Palms, SC; City of Columbia, SC; City of Lancaster, SC; City of Chester, SC; City of Spartanburg, SC; City of Conway, SC; City of Rock Hill, SC; City of Greenwood, SC; City of Myrtle Beach, SC; City of Mauldin, SC; City of Goose Creek, SC; Oconee County, SC; Berkeley County, SC; Charleston County, SC; Dorchester County, SC; Spartanburg County, SC; Town of Mount Pleasant, SC; Town of Hilton Head Island, SC; Town of Moncks Corner, SC; Town of Bluffton, SC; Town of Cheraw, SC; City of Sarasota, FL; City of Winter Park, FL; City of Palm Beach Gardens, FL; City of Orlando, FL; City of Sunrise, FL; City of Panama City, FL; City of Hollywood, FL; City of Melbourne, FL; City of Ft. Myers, FL; Miami-Dade County, FL; Palm Beach County, FL; Alachua County, FL; Manatee County, FL; Martin County, FL; Monroe County, FL; Sarasota County, FL; City of Atlanta, GA; City of Douglasville, GA; City of Alpharetta, GA; City of Brookhaven, GA; City of Statesboro, GA; City of Norcross, GA; City of Garden City, GA; City of Stockbridge, GA; City of Fayetteville, GA; City of Dublin, GA; City of Dunwoody, GA; City of Roswell, GA; City of Tybee Island, GA; City of Chamblee, GA; City of Savannah, GA; City of Kingsland, GA; Forsyth County, GA; Lumpkin County, GA; Douglas County, GA; Worth County, GA; Cherokee County,

GA; City of Daphne, AL; City of Hartselle, AL; City of Auburn, AL; City of Foley, AL; Baldwin County, AL; Chambers County, AL; City of Broken Arrow, OK; Sedgwick County, KS; Shawnee County, KS; City of Salina, KS; City of Leawood, KS; City of Hot Springs, AR; City of Lee's Summit, MO; City of Branson, MO; City of Columbia, MO; City of Fulton, MO; City of Troy, MO; City of Jefferson, MO; City of Dardenne Prairie, MO; Jefferson County, MO; Jackson County, MO; St. Charles County, MO; Mahoning County, OH; City of Winchester, KY; Blount County, TN; City of Clarksville, TN; City of Murfreesboro, TN; City of White House, TN; City of Bloomington, IN; City of Moline, IL; City of Urbana, IL; McLean County, IL; City of Pittsburgh, PA; County of Montgomery, PA; Cumberland County, PA; Town of Wethersfield, CT; Town of Bridgewater, MA; Town of Colchester, VT; Fort Bend County, TX; San Patricio County, TX; Kaufman County, TX; Hood County, TX; Blanco County, TX; Brazoria County, TX; Denton County, TX; Travis County, TX; Town of Little Elm, TX; City of Portland, TX; City of Austin, TX; City of Fate, TX; City of Pearland, TX; City of Seguin, TX; City of Rowlett, TX; City of Sachse, TX; City of Pflugerville, TX; City of Buda, TX; City of Farmers Branch, TX; City of Odessa, TX; City of Fredericksburg, TX; City of Gonzalez, TX; City of South Padre Island, TX; City of Conroe, TX; City of Amarillo, TX; City of Mont Belvieu, TX; City of Duncanville, TX; City of Sunset Valley, TX; City of Manitou Springs, CO; City of Fountain, CO; Grand County, CO; Ouray County, CO; City of Albuquerque, NM; City of Santa Fe, NM; City of Carlsbad, NM; City of Page, AZ; City of Flagstaff, AZ; City of Prescott, AZ; Yavapai County, AZ; Town of Sahuarita, AZ; City of Boulder City, NV; Ogden City Corporation, UT; City of Camarillo, CA; City of Longbeach, CA; City of San Rafael, CA; Mariposa County, CA; Calaveras County, CA; City of Albany, OR; City of Bend, OR; Columbia County, OR; City of Ridgefield, WA; Spokane County, WA; and many others. Information regarding the services provided to some of these local governments as they relate to the services being requested can be found in **Section 2** of our proposal.

The Evergreen Team is able to fully comprehend the challenges and goals of Ashe County because of our vast understanding of local government human resource management and the fact that we possess the necessary experience and expertise. Our team has significant expertise in conducting classification and total compensation studies for local governments and other public sector organizations as can be seen in **Section 1** of our proposal.

Some of the human resource services Evergreen has focused on include: classification and total compensation studies; salary and benefits surveys; staffing studies; workload analyses; performance evaluation and appraisal system design; HR department reviews; recruitment, hiring, and retention studies; strategic and workforce planning; and labor pool availability.

Through our experiences in conducting this wide range of projects, we have gained knowledge of all operations in local government human resources management. As a result, our team knows how critical an effective classification and compensation system is to the overall operation of a proficient and progressive County. Moreover, we have developed helpful methods and tools that assist our clients in implementing and maintaining our study recommendations and results.

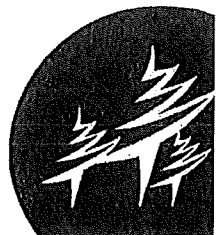
Evergreen's approach to conducting a classification and total compensation study draws not only from extensive human resources work with local government clients, but also from direct feedback of our past clients. In essence, we offer you tools that are innovative as well as those that have been proven to work in real places with real people. Some of the key facets of our approach identified in **Section 4** of our proposal include:

- We emphasize communication as the key to successful study completion as well as implementation. Our team understands that compensation by its very nature creates anxiety in staff and managers alike. In order to ensure a successful study process and "buy-in" at implementation, County administrators, department heads, and staff need to be involved in every step of the process. This is a critical component of our communication plan. Continuous communication is ensured through the use of meetings/conference calls and the submission of written progress reports.
- Our methodology utilizes the latest in technology. In order to reduce the cost to our client partners and enhance wider participation, we offer all of our tools in an electronic format. In essence, every step of the process can be done on the Web. Further, our web-based **JobForce Manager** tool allows our client partners to facilitate implementation and eases the ongoing maintenance of the compensation system.
- We understand that one size does not fit all. Some consultants provide the same overall solution to every client; however, we provide a variety of alternatives that allow our client partners to select the solution that best meets their business and human capital needs.

As President of Evergreen Solutions, I am authorized to commit our firm contractually to this engagement.

We appreciate this opportunity and commit to you our best effort if selected for this engagement. If you have any questions, please feel free to contact me at (850) 383-0111 or via email at [jeff@consultevergreen.com](mailto:jeff@consultevergreen.com).

Sincerely,  
  
Dr. Jeff Ling, President



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## *Section 1.0*

# *Statement of Understanding*



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# 1.0 *Statement of Understanding*

In this section, we include a statement of understanding of the work being requested and our approach and methodology to conduct a Classification and Total Compensation Study for Ashe County. A detailed work plan— identifying the tasks, activities, and milestones necessary to accomplish the deliverables listed in the scope of work of the Request for Proposals is provided in **Section 3** of our proposal. A proposed project schedule (i.e., implementation schedule), including an estimated start date, is included in **Section 5** of our proposal.

## 1.1 Statement of Understanding

Evergreen understands Ashe County would like a firm to assist with maintaining a competitive and equitable classification and total compensation system for all positions when considered in relation to each other (internally) and when compared to the external labor market. In order to successfully complete the study, the following tasks should be conducted:

- perform a review of the existing classification plan and related job descriptions;
- perform a salary study including public and private employers who are providing comparable services;
- prepare recommendations for compensation policies, including cost of living increases, career ladders, certification incentives, and to ensure internal pay equity; and
- examine and compare benefits in relation to other local governments.

## 1.2 Approach and Methodology

Evergreen Solutions is uniquely qualified to conduct a Classification and Total Compensation Study for Ashe County as our team includes recognized experts in local government human resources management and understands that there is not a “one size fits all” solution to compensation management. Our approach is built on working collaboratively with all parties to make sound, implementation-focused recommendations. Specifically, we have developed a methodology that:

- focuses on market competitiveness;
- is based on the organization’s compensation philosophy;
- recognizes that compensation is comprised of more than just base pay levels;
- reflects changes in recent compensation strategies;



- designs custom solutions that take into account the diversity of needs present in the organization and allows you to select the components and options that best meet your overall needs; and
- produces a structure that improves the organization's ability to recruit, reward, motivate, and retain talent in a competitive environment that includes both public and private sector employers.

We will work closely with the County's designated Project Manager, County Manager and/or designated staff, and the Human Resources Department throughout the process to ensure constant communication of issues, concerns, and potential outcomes. We work closely with your staff to gain a solid understanding of your current operational realities, challenges, and desired outcomes. Moreover, Evergreen will work with you to balance your needs to meet your performance goals while carefully managing your resources.

Compensation management has undergone significant transformation in the private sector and over time public sector organizations have mirrored these changes. While compensation once centered on the separate administration of base pay and core benefits, a shift has occurred that has transformed compensation management.

Progressive organizations now recognize that to effectively recruit, reward, motivate, and retain employees, compensation management requires strategic thinking and planning. Compensation management must support an organization's overall strategic direction. To accomplish this, effective organizations design a compensation philosophy that details where an organization wants to be in relation to the market in key areas. These key areas include cash compensation, benefits, and work/life balance. Compensation is thus a reflection of the organization's philosophy.

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

Listed below is an overview of the typically recommended approach that Evergreen takes when conducting a study of this nature.

#### **Kick Off Meeting**

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

- finalizing the project work plan;
- identifying milestone and deliverable dates;
- gaining insight into the management structure and approach;
- collecting classification, compensation, and benefits data;
- identifying additional data needs; and
- developing preliminary schedules for subsequent tasks.



	<p>At this time, we will also request a copy of the employee database that reflects current classification and compensation data.</p>
<p><b>Communication Plan</b></p>	<p>Communication is a critical component of any Classification and Total Compensation Study. Communicating with employees directly and early in the process builds support for the process and the accompanying outcomes. As part of our communication plan, we meet first with key project staff to fully understand the nature and scope of the project. The results of these meetings are then communicated to employees during the project outreach through employee orientation sessions, focus groups, and interviews. Regular updates are provided to the client's Project Manager and can be posted on the client's intranet site, if available and desired. Additionally, the communication plan for the distribution of the end product, particularly how the results will be distributed to employees, is also critical.</p>
<p><b>Employee Orientation and Focus Groups</b></p>	<p>Based on client feedback and a review of best practices, we have designed an orientation curriculum that provides employees insight into the process as well as provides a forum for answering questions and soliciting participation. Following the orientation sessions, we begin the focus group process. Focus groups are used to gain detailed insight into employee perceptions, concerns, and issues. The protocol for the sessions is provided to your project team in advance and refined to meet your needs.</p> <p>We have found that employee orientation sessions and focus groups are critical venues for building employee participation and buy-in. Since they take place at the outset of the project, they are a critical introduction to the project and the question-and-answer formats allow employees to become engaged in the process. During these sessions, Evergreen's consultants can also help to manage expectations since some employees may have unrealistic expectations based on anecdotal information.</p>
<p><b>Department Head Interviews</b></p>	<p>Evergreen staff conduct one-on-one interviews with department heads and/or senior management (in addition to any other employees the client determines is necessary) to identify challenges for consideration. These interviews will allow our staff to add details to our understanding of the organization and its needs. They also allow our consultants the opportunity to better understand the organizational structure of each department as well as the unique recruiting and retention issues that may be present in each department. Frequently, department directors and senior management serve as invaluable resources in explaining how internal equity relationships have evolved over time and explaining the nuances between the differences in jobs.</p>
<p><b>Job Assessment Tool and Management Issue Tool</b></p>	<p>Another important activity undertaken at this time is the distribution of Evergreen's Job Assessment Tool© (JAT). These questionnaires are central components of the job evaluation process. The JAT asks a series of questions regarding an employee's job that captures the nature of the job and how it interacts with work within the organization.</p>





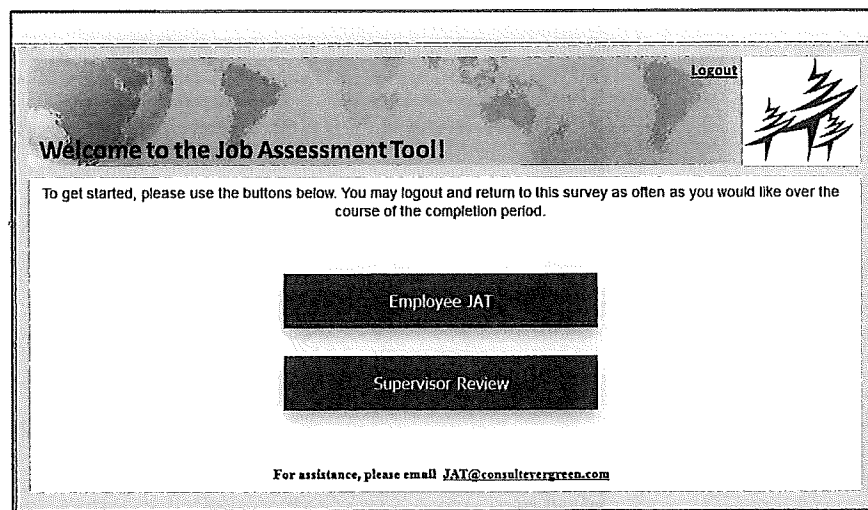
The JAT contains questions that ask about each of the following areas:

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

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

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

**Exhibit 1-1**  
**Supervisor's JAT Home Screen**



Source: Evergreen Solutions, 2023



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

**Exhibit 1-2**  
**Job Description and Responsibilities**

**Logout**

**Basic Job-Related Information**

**Job Introduction**  
Briefly provide an overview of your job, including a description of the purpose of your job and the type of work you do. This may be the same as the introduction to your current job description, but it does not need to be.

Description

Type of Work  
Please select the level that best describes the type of work you perform.

Type of Work

- ☐ Clerical/Support - Performs a variety of office and administrative support duties OR unskilled labor-related tasks
- ☐ Laborer/Trade-Based Occupations - Performs work necessitating repetitive operations with their hands, physical skill and energy
- ☐ Technical/Paraprofessional - Performs tasks requiring a solid understanding of basic algebra and statistics OR use of heavy equipment
- ☐ Administration - Performs tasks directly related to the management or general business operations. Exercises discretion and judgment with matters of significance
- ☐ Managerial/Professional - Performs tasks requiring advanced knowledge, which is predominantly intellectual in nature, OR tasks related to the control or administration of part of the organization
- ☐ Executive/Advanced Professional - Performs tasks related to managing the organization or managing a department OR perform work requiring highly advanced knowledge

Education and Experience  
Please select the level that best describes how much education and experience a new-hire should be required to have for your position.

Education -Select One-

Experience -Select One-

Licenses and Certifications  
Please list any licenses, certifications, or professional designations you believe should be required or preferred for your position.

Required

**Save**

253

Source: Evergreen Solutions, 2023



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

**Exhibit 1-3**  
**Job Functions**

**Essential Job Functions**

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

Task	Percent	Priority
Task 1	0 100	<input type="checkbox"/>
Task 2	0 100	<input type="checkbox"/>
Task 3	0 100	<input type="checkbox"/>
Task 4	0 100	<input type="checkbox"/>
Task 5	0 100	<input type="checkbox"/>
Task 6	0 100	<input type="checkbox"/>
Task 7	0 100	<input type="checkbox"/>
Task 8	0 100	<input type="checkbox"/>
Task 9	0 100	<input type="checkbox"/>
Task 10	0 100	<input type="checkbox"/>

Source: Evergreen Solutions, 2023

In addition to the JAT, Evergreen will also distribute our Management Issues Tool (MIT). The MIT is distributed to supervisors and managers and is used to collect specific information from supervisors and managers related to such issues as recruitment and retention problems, classification issues, pay equity issues, problems with titles, and other related issues. Each MIT will be logged and a specific response will be provided. The MIT process is designed to allow supervisors and managers to give direct input into the process and they serve as "red flags" to Evergreen staff during the analysis portion of the project.



<b>Preliminary Assessment</b>	<p>As a starting point for analysis, Evergreen's project consultants review the client's database in comparison to the pay plan and information collected from the JATs to produce a preliminary assessment. The preliminary assessment summarizes the strengths and weaknesses of your human resource management system. The compensation analysis focuses on the number of pay grades, range widths, percentage differences between grades, step plans versus open range plans, and the expected time to reach full job competency. The overall analysis focuses on structure, movement, and equity (internal) as well as specific concerns such as turnover, longevity, compression, and range anomalies. The issues we identify in the assessment become core considerations in creating the potential solutions later in the process.</p>
<b>Job Evaluation</b>	<p>The next step in the process is to review responses to the JATs and identify any possible misclassifications. Once the review of the JATs has been completed, Evergreen's consultants will evaluate all jobs on each of the compensatory factors, score each position, and determine if there is any need for further investigation of specific positions. If serious discrepancies exist, Evergreen's consultants will work directly with the Client Project Manager to resolve any issues.</p> <p>Once work has been properly classified, changes in the current classification system rankings can be recommended. Our goal is to produce a classification system that reflects the internal equity relationships suggested by the JAT scoring conducted earlier.</p>
<b>Compensation</b>	<p>Our approach to compensation analysis is based on the belief that compensation should be organization-specific, fair, equitable, and directly tied to strategic goals. To ensure that all these criteria are met, we will conduct an extensive analysis on the relevant labor market, the internal structure and inter-relatedness of jobs within the organization, and the relative worth of jobs within the organization vis-à-vis the compensation philosophy.</p> <p>The most traditional component of a total compensation program is base pay (fixed pay). However, inclusion of benefits in total compensation strategy is not a new concept. Provision of benefits was originally a recruitment tool, though over time the provision of core benefits has become an expectation. Research shows that public sector organizations commonly use superior benefits packages as a way to offset structural disadvantages in base pay. The purpose of the survey is to collect information for comparison to current offerings, and making recommendations for change consistent with the parameters of the organization's compensation philosophy.</p>
<b>Market and Benefits Survey</b>	<p>A key component of assessing compensation is to consider market position, which is sometimes referred to as external equity or competitiveness. Evergreen's consultants wait until well into the classification analysis to design the market survey to ensure that jobs are understood, anomalies in classification characteristics are documented, and sufficient input has been received. The market survey will obtain standard range information related to minimum, midpoint, and maximum salaries. Data collection will focus on</p>



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	<p>the public sector, but will include information from the private sector where applicable. Further, we will look to include any employers to whom the organization has recently lost employees.</p> <p>In addition, a benefits survey will also be administered in tandem with the market survey. Special consideration can be given to selecting highly competitive, market-driven positions if necessary.</p>
<b>Benchmarks</b>	<p>One of the most important components of the external assessment is in the selection and utilization of benchmark positions for the labor market survey. We will work with the client to identify the appropriate number of benchmark positions to best suit the client's needs in the labor market survey. Based on our experience, we have found that it is simply not practical to survey all positions within the organization—the resulting surveys become too cumbersome for labor market peers to complete, and the response rate on the whole suffers. We ensure, through multiple checks and balances, that the benchmark positions chosen will represent a broad spectrum of positions across the organization, from all job families, pay levels, and functional areas.</p>
<b>Targets</b>	<p>To conduct an external labor market assessment, we work with the client to identify the most appropriate targets to survey. Evergreen selects peer organizations based on the local labor competition, regional markets, and class-specific markets. Peer organizations should be those organizations that compete with the client for labor in at least one job family. An appropriate mix of peers in the public and private sectors will be included in the survey, and if necessary, augmented with published secondary data sources.</p> <p>Typically, Evergreen waits until the outreach process has been completed to identify the complete list of market peers. This is because we often will uncover specific information during the focus group and interview sessions that identifies potentially critical survey targets. Ideally, we would like to work with the client after the outreach has been concluded to identify the final list of potential market peers.</p> <p>An important factor of our methodology is that the client has the final approval of all aspects of the study. We will not proceed with the analysis unless the client is completely comfortable with the survey targets chosen. Often, there are different factors impacting an organization, such as proximity to a major metropolitan area, technology corridor, or specific market (i.e., military base), that have a direct effect on its ability to recruit and retain employees in specific positions. These factors have to be taken into account when selecting survey targets. Once the targets are selected and approved, the survey instrument is developed and sent to the client for final approval. Subsequent to client approval, the survey is then distributed to the targets in both paper and electronic formats.</p> <p>Evergreen uses a four-fold method of communicating with respondents. Our staff notifies the target group that the survey is being sent or made available, confirms receipt, and encourages participation. Once the data are received, they are cleaned, validated, and summarized. A separate report is issued that shows the results of the salary survey.</p>



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## Unifying the Solution

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

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

It is at this stage in the process that we typically meet with the client to identify the direction of the final solution. We will present to the client a draft report for review and comment. We typically ask the client to examine the draft solution objectively and provide insights and recommendations on the direction of the report. When this process is completed, Evergreen's consultants will proceed with the final solution. The solution also contains information regarding fiscal impact and implementation.

## Compensation Administration Guidelines

In order for clients to maintain the recommended compensation system, Evergreen develops compensation administration guidelines for use by the client after completion of the study. The guidelines will include recommendations on installation and continuing administration of the system. The team first conducts a review of current practices and procedures then assesses their effectiveness, compliance with legal guidelines, and applicability to the recommended system.

Once this review and assessment are complete, revisions to the current practices and/or new guidelines can be recommended, as needed. At a minimum, the recommendations will address areas such as:

- how employees will move through the pay structure/system as a result of transfers, promotions, or demotions;
- how to pay employees whose base pay has reached the maximum of their pay range or value of their position;
- the proper mix of pay and benefits;
- how often to adjust pay scales and survey the market;
- timing of implementation; and
- how to keep the system fair and competitive over time.

## System Maintenance

Our goal is to produce recommendations that are effective and that can be maintained by our clients. We are strongly committed to providing transparent and replicable solutions. In essence, when we complete our core assignment, our goal is that our client's staff can maintain and update the system on their own. We are readily available to provide assistance, but our goal is to give our clients all the tools and training that are needed. Towards this end we will provide the Human Resources Department with all necessary tools and training to maintain the system over time.



Based on client needs and industry best practices, Evergreen has developed a compensation and classification maintenance tool to assist our clients with implementing, managing, and updating the solutions: **JobForce Manager**. This tool allows our clients to estimate future pay plan changes, update market information, make determinations on reclassifications, and create new jobs. By automating these tasks, **JobForce Manager** allows our



clients to not only streamline, but also increase the fairness and transparency of regular compensation and classifications tasks after solution implementation.

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

**Exhibit 1-4**  
**JobForce Manager Tool**

Pay Plans	Scoring/Slotting	Compensation	Market	Account						
 Download Data  Grid Edit										
CURRENT TITLE ▲	PAY PLAN	JAT SCORE	REGRESSION MIDPOINT	MARKET MIDPOINT	POSITION MIDPOINT (SELECT)	GRADE	MINIMUM	MIDPOINT	MAXIMUM	
Accounting Specialist II	ESP	212.5	\$30,100.27	\$31,220.80	\$31,508.69	105	\$22,702.21	\$31,508.69	\$40,315.17	/ Edit
Accounting Specialist III	ESP	281.3	\$39,058.27	\$34,379.43	\$40,213.96	110	\$28,974.42	\$40,213.96	\$51,453.51	/ Edit
Accounting Specialist IV	ESP	306.3	\$42,315.73	\$40,166.80	\$44,335.90	112	\$31,944.29	\$44,335.90	\$56,727.50	/ Edit
Accounting Supervisor	ESP	500.0	\$67,661.02	\$69,350.91	\$68,778.53	121	\$49,556.08	\$68,778.53	\$88,002.97	/ Edit
Acquisition Specialist	ESP	306.3	\$42,315.73	\$41,595.60	\$44,335.90	112	\$31,944.29	\$44,335.90	\$56,727.50	/ Edit
Administrative Aide	ESP	912.5	\$43,130.09	\$36,624.74	\$44,335.90	112	\$31,944.29	\$44,335.90	\$56,727.50	/ Edit
Administrative Recording Secretary	Professional	381.3	\$52,089.10	\$40,994.30	\$58,245.16	212	\$46,596.13	\$58,245.16	\$69,894.19	/ Edit
Administrative School Secretary I	ESP	206.3	\$29,285.91	\$31,619.17	\$33,084.13	106	\$23,837.32	\$33,084.13	\$42,330.93	/ Edit
Administrative School Secretary II	ESP	231.3	\$32,543.36	\$35,996.59	\$34,738.33	107	\$25,029.19	\$34,738.33	\$44,447.48	/ Edit
Administrative School Secretary III	ESP	256.3	\$35,800.82	\$37,701.80	\$38,299.01	109	\$27,594.68	\$38,299.01	\$49,003.35	/ Edit
Administrative Secretary I	ESP	231.3	\$32,543.36	\$32,190.02	\$33,084.13	106	\$23,837.32	\$33,084.13	\$42,330.93	/ Edit
Administrative Secretary I	ESP	206.3	\$29,285.91	\$32,190.02	\$33,084.13	106	\$23,837.32	\$33,084.13	\$42,330.93	/ Edit
Administrative Secretary II	ESP	231.3	\$32,543.36	\$33,919.04	\$34,738.33	107	\$25,029.19	\$34,738.33	\$44,447.48	/ Edit
Administrative Secretary II	ESP	231.3	\$32,543.36	\$33,919.04	\$34,738.33	107	\$25,029.19	\$34,738.33	\$44,447.48	/ Edit
Administrative Secretary III	ESP	256.3	\$35,800.82	\$35,971.01	\$38,299.01	109	\$27,594.68	\$38,299.01	\$49,003.35	/ Edit
Administrative Specialist	Professional	231.3	\$32,543.36	\$43,762.63	\$39,422.62	204	\$31,538.09	\$39,422.62	\$47,907.14	/ Edit
Administrative Specialist-School Food Services	Professional	275.0	\$38,243.91	\$42,861.08	\$45,636.61	207	\$36,509.29	\$45,636.61	\$54,763.93	/ Edit

Source: Evergreen Solutions, 2023



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## *Section 2.0*

### *Synopsis*





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## 2.0 *Synopsis*

The following describes the salient features of our proposal to conduct a Classification and Total Compensation Study for Ashe County.

### **Statement of Understanding**

In **Section 1** of our proposal, we include a statement of understanding of the work being requested and our approach and methodology to conduct a Classification and Total Compensation Study for Ashe County.

Our approach is built on working collaboratively with all parties to make sound, implementation-focused recommendations. Specifically, we have developed a methodology that: focuses on market competitiveness; is based on the organization's compensation philosophy; recognizes that compensation is comprised of more than just base pay levels; reflects changes in recent compensation strategies; designs custom solutions that take into account the diversity of needs present in the organization and allows you to select the components and options that best meet your overall needs; and produces a structure that improves the organization's ability to recruit, reward, motivate, and retain talent in a competitive environment that includes both public and private sector employers.

### **Detailed Breakdown and Description of the Specific Steps, Services, and Study Products**

In **Section 3** of our proposal, we provided a detailed work plan— identifying the tasks, activities, and milestones necessary to accomplish the deliverables listed in the scope of services of the Request for Proposal and a description of study products.

Our detailed work plan consists of the following eleven work tasks:

- Task 1: Project Initiation
- Task 2: Evaluate the Current System
- Task 3: Collect and Review Current Environment Data
- Task 4: Evaluate and Build Projected Classification Plan and Make FLSA Determinations
- Task 5: Identify List of Market Survey Benchmarks and Approved List of Targets
- Task 6: Conduct Market Salary and Benefits Survey and Provide External Assessment Summary
- Task 7: Develop Strategic Positioning Recommendations
- Task 8: Conduct Solution Analysis
- Task 9: Develop and Submit Draft and Final Reports
- Task 10: Develop Recommendations for Compensation Administration
- Task 11: Provide Updated Class Descriptions

At the conclusion of the study, Evergreen will deliver a draft and final report that will include the following six chapters.



- 
- **Chapter 1: Introduction** - This chapter provides an introduction into the study and describes the necessary steps that will take place. The major deliverables include a revised project plan, timeline, outreach protocols, document questions, and weekly update reports.
  - **Chapter 2: Summary of Outreach** - This chapter provides a summary of any employee meetings and department head interviews. The major deliverables include a summary of outreach results and potential issues for further investigation.
  - **Chapter 3: Assessment of Current Conditions** - This chapter provides an overall assessment of the structure of the compensation plan in place and a brief analysis of the employee demographics. The major deliverables include career path analysis, range and rank compression analysis, strengths and weaknesses of the current system, and initial findings.
  - **Chapter 4: Market Summary** - This chapter provides results of the market salary survey that was distributed to peer organizations. The major deliverables include a summary of market peers, proposed benchmark jobs, peer survey, extrapolation file for benchmarks to other jobs, and market results by classification.
  - **Chapter 5: Benefits Summary** - This chapter provides results of the market benefits survey that was distributed to peer organizations.
  - **Chapter 6: Solution** - This chapter summarizes the proposed recommendations based on the findings from the previous chapters. The recommendations generally include four different categories: *Classification*, *Overall Structure*, *Compensation*, and *Administration*. The major deliverables include report, policy recommendations, and implementation plans.

### **Study Costs**

Our total, not-to-exceed, fixed cost to complete all tasks identified in our detailed work plan in **Section 3** of our proposal is **\$31,500**. Our cost is all inclusive, and includes travel costs (meals and lodging), transportation, fringe benefits, indirect costs (overhead), clerical support, and all other out-of-pocket expenses. **Note:** Our cost includes two onsite visits to the County to provide the requested work as most of the work can be performed virtually.

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

### **Proposed Implementation Schedule**

Evergreen possesses the ability, staff, skills, and tools to conduct a Classification and Total Compensation Study for Ashe County in four months of the project start date and following the signing of the contract. This implementation schedule is based on a tentative start date of December 1, 2023, and a completion date of March 31, 2024. Our proposed implementation schedule can be modified in any way to best meet the needs of the County.

### **Client References**

In **Section 7**, we provide you with a list of similar projects we have conducted or are currently on contract to conduct as well as a list of references that we feel demonstrate our experience within the last five years as it relates to the services being requested. We invite you to contact our client references as to the quality and timeliness of our consulting projects. Additional references are available upon request.

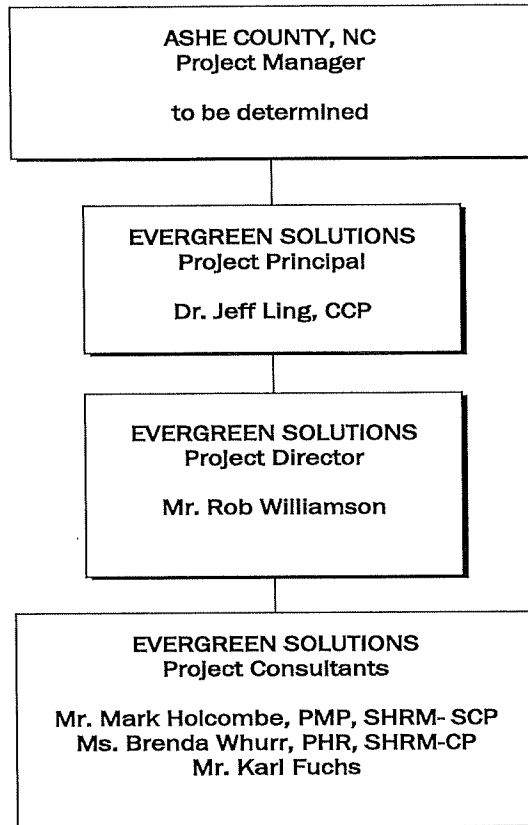


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## **Brief Introduction**

In **Section 6** of our proposal, we provide you with a brief background and history of our firm and the qualifications of our proposed project team. As required by the RFP, we have limited this section to no more than four pages. **Exhibit 2-1** below provides our proposed project team.

**Exhibit 2-1  
Proposed Project Team**



## **Statements**

Evergreen agrees to the following statements, as required by the RFP:

- be available for an interview with pertinent staff, if the firm is a finalist in the selection process;
- deliver at least six copies of the final report to the Human Resources Director;
- provide the final report, tables, schedules, job descriptions, charts, spreadsheets, procedures manual, salary surveys, benefits survey and other materials necessary for the implementation and maintenance of the compensation/classification system in an electronic medium (USB) in Microsoft Office 365 format; and
- appear at a scheduled Board of County Commissioners' meeting to discuss the recommendations and final report.



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## *Section 3.0*

### *Detailed Breakdown and Description of the Specific Steps, Services, and Study Products*



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## 3.0 *Detailed Breakdown and Description of the Specific Steps, Services, and Study Products*

In this section, we include a detailed work plan—identifying the tasks, activities, and milestones necessary to accomplish the deliverables listed in the scope of work of the Request for Proposals and a description of study products.

### 3.1 Detailed Work Plan

The detailed work plan that Evergreen proposes to use to conduct the Classification and Total Compensation Study for Ashe County is provided in this section. Evergreen understands the County has approximately 167 job classifications that will be included in the study.

Our work plan consists of the following 11 work tasks:

- Task 1: Project Initiation
- Task 2: Evaluate the Current System
- Task 3: Collect and Review Current Environment Data
- Task 4: Evaluate and Build Projected Classification Plan and Make FLSA Determinations
- Task 5: Identify List of Market Survey Benchmarks and Approved List of Targets
- Task 6: Conduct Market Salary and Benefits Survey and Provide External Assessment Summary
- Task 7: Develop Strategic Positioning Recommendations
- Task 8: Conduct Solution Analysis
- Task 9: Develop and Submit Draft and Final Reports
- Task 10: Develop Recommendations for Compensation Administration
- Task 11: Provide Updated Class Descriptions

#### Task 1.0 Project Initiation

##### TASK GOALS

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

##### TASK ACTIVITIES

- 1.1 Discuss with the County's Project Manager (CPM), and any other key leadership (i.e., County Manager and/or designated staff) the following objectives:



**Task 2.0**  
**Evaluate the**  
**Current System**

- the classification and pay plan study process;
- understand mission and current compensation philosophy;
- 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 what type of pay plan will reinforce current and future goals.

1.3 Obtain relevant materials from the County, including:

- any previous projects, research, evaluations, or other studies that may be relevant to this project;
- organizational charts for the departments and divisions, along with related responsibility descriptions;
- current position and classification descriptions, salary schedule(s), and classification system, benefits information; and
- personnel policies and procedures, including step placement policies.

1.4 Review and edit the project work plan and submit a timeline for the completion of each project task.

1.5 Provide the CPM with status reports throughout the study. **Note:** Evergreen will attend virtual meetings, if requested, throughout the process with employees, the County Manager and/or designated staff and the Board of Commissioners to explain the methodology, survey results, and recommendations.

**KEY PROJECT MILESTONES**

- Comprehensive project management plan
- Comprehensive database of full-time County staff

**TASK GOAL**

- Conduct a comprehensive preliminary evaluation of the existing classification and compensation plan(s) for the County.



**Task 3.0  
Collect and Review  
Current  
Environment Data**

**TASK ACTIVITIES**

- 2.1 Obtain the existing pay structure and compensation philosophy (if any). Review the existing pay structure and look for potential problems and issues to be resolved.
- 2.2 Determine the strengths and weaknesses of the current pay plan(s) and classification structure for the County. Address any pay compression issues that may exist and discuss possible solutions.
- 2.3 Assess any equity concerns that may arise including differences in work hours, work week, etc.
- 2.4 Complete an assessment of current conditions that details the pros and cons of the current system, taking into account the current benefit package as part of total compensation, as well as highlights areas for potential improvement in the final adopted solution.

**KEY PROJECT MILESTONES**

- Review of existing compensation plan(s)
- Pay compression issues and solutions
- Assessment of current conditions

**TASK GOALS**

- Conduct statistical and anecdotal research into the current environment within the County.
- Guide subsequent analytical tasks.

**TASK ACTIVITIES**

- 3.1 Schedule and conduct employee orientation sessions to describe the scope of work and methodology.
- 3.2 Interview department heads to obtain relevant information and statistical/anecdotal data on specific compensation issues and policies. Obtain insight into perceived current compensation system strengths and weaknesses.
- 3.3 Hold focus groups with a sample of employees to obtain additional relevant information and statistical/anecdotal data on specific compensation issues and policies.
- 3.4 Work with the CPM and Human Resources staff to administer the JATs and MITs. Our staff utilizes a web-based tool for data collection, but we can provide paper copies as well as those for classifications without computers or Internet access. We will seek approval from the CPM before distribution of the JAT/MIT questionnaire.



**Task 4.0  
Evaluate and Build  
Projected  
Classification Plan  
and Make FLSA  
Determinations**

- 3.5 Review any data provided by the County that may provide additional relevant insight.

**KEY PROJECT MILESTONES**

- Job assessment tool distribution
- Department head interviews
- Employee focus groups and orientation sessions

**TASK GOALS**

- Identify the classification of existing positions utilizing the approved method for job evaluation.
- Characterize internal equity relationships within the County.

**TASK ACTIVITIES**

- 4.1 Ensure that all draft class specifications are provided to Evergreen by the CPM.
- 4.2 Review the work performed by each classification and score based on job evaluation. Include an evaluation of supervisory comments.
- 4.3 Review job evaluation scores and identify the classification of positions.
- 4.4 Schedule and conduct additional follow-up with employees for jobs where uncertainty exists over data obtained from job evaluation.
- 4.5 Develop preliminary recommendations for the classification structure and discuss with the CPM. The classification system designed at this point would be based solely on internal equity relationships and would be guided by the job evaluation scores for each classification. Essentially, a structure of classifications would be established, and classifications with similar scoring would be grouped and spacing between jobs would be determined.
- 4.6 Identify FLSA and DOL compliance issues in classifications, work schedules, overtime/compensatory pay (blended rates), longevity, paid leave holidays and additional pay such as "on-call", incentive pay and fringe benefits.
- 4.7 Recommend best practices regarding FLSA compliant payroll calculations with varying 7-day workweeks (i.e. Sat-Fri, Sun-Sat, etc.) and work schedules, identifying different shift and pay schedules (i.e. E911, fluctuating workweek, 12- hours shifts, 207k employees).
- 4.8 Develop recommendations of FLSA (exemption) status based on results of the job evaluation (JAT) review and federal requirements.





**Task 5.0  
Identify List of  
Market Survey  
Benchmarks and  
Approved List of  
Targets**

- 4.9 Analyze existing internal hierarchy and internal career ladders where appropriate and clearly outline job progression opportunities.
- 4.10 Review recommendations with the CPM.

**KEY PROJECT MILESTONES**

- Job evaluation scores by class
- Recommended classification changes
- Recommended FLSA status
- Preliminary job structure based on internal equity

**TASK GOALS**

- Reach an appropriate number and identify the proper benchmark positions for the external labor market assessment of salary and benefits.
- Identify and develop a comprehensive list of targets for conducting a successful external labor market assessment of salary and benefits.

**TASK ACTIVITIES**

- 5.1 Identify, from the initial review, a list of classifications (benchmarks) to include in the labor market survey. **Note:** Evergreen will work with the CPM to select up to 80 classifications to use as benchmarks for the salary and benefits survey
- 5.2 Finalize the list of positions with the CPM.
- 5.3 For each employee group review with the CPM peer organizations to use as targets for the salary and benefits survey. **Note:** Evergreen will work with the CPM to select up to 20 targets for the salary and benefits survey.
- 5.4 Develop a preliminary list of organizations for the external labor market survey of salary and benefits, placing a comparative emphasis on characteristics such as:
  - size of the organization;
  - geographic proximity to the Jefferson area;
  - economic and budget characteristics; and
  - other demographic data.
- 5.5 Develop a list of survey targets by employee group. Develop a system for use of secondary data including potential sources and weighting of secondary data, if necessary.



**Task 6.0  
Conduct Market  
Salary and  
Benefits Survey  
and Provide  
External  
Assessment  
Summary**

- 5.6 Review survey methodology with the CPM and refine survey methodology prior to distribution of surveys.
- 5.7 After approval of survey methodology, develop contact list of peer organizations and notify peers of impending surveys.

**KEY PROJECT MILESTONES**

- Final list of benchmark positions for the external labor market assessment salary survey
- Initial list of survey peers
- Survey methodology
- Final list of survey organizations and contacts

**TASK GOALS**

- Conduct the external labor market salary survey.
- Conduct a benefits survey.
- Provide a summary of the market salary and benefits survey results to the CPM.

**TASK ACTIVITIES**

- 6.1 Prepare a customized external labor market salary survey for CPM approval. Discuss questions and categories for the market survey.
- 6.2 Develop a listing of the current benefits provided by the County for comparisons with peer organizations.
- 6.3 Using the list of County provided benefits and major benefits offerings not provided by the County develop a list of benefits to include in the external labor market survey.
- 6.4 Prepare benefits survey to be included with salary survey developed in **Task 6.1**.
- 6.5 Contact the targets for electronic completion of the survey. Provide paper copies by fax, if requested.
- 6.6 Conduct necessary follow-up through e-mails, faxes, and phone calls.
- 6.7 Collect and enter survey results into Evergreen's electronic data analysis tools.
- 6.8 Validate all data submitted.



**Task 7.0  
Develop Strategic  
Positioning  
Recommendations**

- 6.9 Develop summary report of external labor market salary and benefits assessment results.
- 6.10 Submit summary report of external labor market salary and benefits assessment results to the CPM.

**KEY PROJECT MILESTONES**

- Market survey instrument
- Benefits survey instrument
- Summary report of external labor market salary and benefits assessment results

**TASK GOALS**

- Assess the appropriateness of the current compensation philosophy for the County.
- Develop a plan for employees, providing issue areas and preliminary recommendations for strategic improvement.

**TASK ACTIVITIES**

- 7.1 Identify the compensation philosophy and accompanying thresholds.
- 7.2 Using the market salary survey data collected in **Task 6.0**, and the classification data reviewed in **Task 4.0**, recommend the appropriate pay plan(s) for the County.
- 7.3 Produce a pay plan for the County that meets its needs from an internal and external equity standpoint.

**KEY PROJECT MILESTONES**

- Proposed compensation strategic direction, taking into account internal and external equity
- Plan for addressing unique, highly competitive positions

**Task 8.0  
Conduct Solution  
Analysis**

**TASK GOALS**

- Conduct analysis comparing job evaluation values.
- Survey results for the benchmark positions.
- Produce several possible solutions for implementation.



**Task 9.0  
Develop and  
Submit Draft and  
Final Reports**

**TASK ACTIVITIES**

- 8.1 Conduct regression analysis or other appropriate techniques to properly slot each select classification into the proposed pay plan for the County.
- 8.2 Place all classifications into pay grades based on **Task Activity 8.1**. Sort alphabetically by job class title, in descending order by range, and by old class title and new class specifications.
- 8.3 Create implementation solutions for consideration that take into account the current position of the County as well as the findings from the classification and compensation analysis. Identify and prepare a range of compensation policy alternatives. **Note:** Evergreen will recommend pay progression methods to include sound practices to prevent salary bypassing and mitigate pay compression.
- 8.4 Meet with the CPM to discuss the potential solutions.
- 8.5 Determine the best solution to meet the needs of the County in the short-term and long-term.
- 8.6 Document the accepted solution.

**KEY PROJECT MILESTONES**

- Initial regression analysis
- Potential solutions
- Documented final solution

**TASK GOALS**

- Develop and submit a draft and Final Report of the Classification and Total Compensation Study for Ashe County.
- Present the Final Report.

**TASK ACTIVITIES**

- 9.1 Produce a comprehensive draft report that captures the results of each previous step, including a complete listing of the allocation of job classes to salary range requirements. Provide the CPM and City administrative officials a draft final report for review that will include all costs associated with all recommendations as well as implementation strategies.
- 9.2 Make edits and submit six hard copies of the Final Report to the CPM.



**Task 10.0  
Develop  
Recommendations  
for Compensation  
Administration**

- 9.3 Present the Final Report to the Board of Commissioners.
- 9.4 Develop a communication plan for sharing study results with employees of the County.
- 9.5 Develop a plan for maintaining recommendations over time.

**KEY PROJECT MILESTONES**

- Draft and final reports
- Final presentation
- Communication plan
- Implementation and maintenance database

**TASK GOALS**

- Develop recommendations for continued administration by City staff to sustain the recommended compensation and classification system.
- Conduct training.

**TASK ACTIVITIES**

- 10.1 Develop recommendations and guidelines for continued administration and maintenance of the classification and compensation system by County staff, including recommendations and guidelines related to:
  - how employees will move through the pay structure/system as a result of transfers, promotions, or demotions;
  - how to pay employees whose base pay has reached the maximum of their pay range or value of their position;
  - the proper mix of pay and benefits;
  - how often to adjust pay scales and survey the market;
  - the timing of implementation; and
  - how to keep the system fair and competitive over time.
- 10.2 Recommend effective recruitment/retention strategies for hard to fill, high turnover positions.



**Task 11.0 /  
Provide Updated  
Class Descriptions**

- 10.3 Recommend pay treatment for probationary employees and for “trainees”.
- 10.4 Review existing Personnel Policy and provide recommendations for additions, changes and deletions based on final report. Provide recommendations on how to update and maintain the Personnel Policy on an ongoing basis. **Note:** When necessary, Evergreen will create language that is appropriate and applicable.
- 10.5 Present recommendations to the CPM for review.
- 10.6 Finalize recommendations.
- 10.7 Provide training and tools to Human Resources Department staff to ensure that staff can conduct audits/adjustments consistent with study methods until the next formal study is conducted using Evergreen’s **JobForce Manager** tool that will enable Human Resources staff to estimate future pay plan changes, update market information, make determinations on reclassifications, and create new jobs – allowing for streamlining, and an increase in fairness and transparency of regular compensation and classification tasks after solution implementation.

**KEY PROJECT MILESTONES**

- Recommendations for compensation administration
- Recommendations for recruitment/retention policies
- Training on Evergreen’s **JobForce Manager** tool

**TASK GOALS**

- Update existing class descriptions.
- Create new class descriptions as needed, ensuring ADA, FLSA, EEO, etc. requirement satisfaction.
- Provide final version of all class descriptions/specifications in electronic format (i.e., MS Word).

**TASK ACTIVITIES**

- 11.1 Assess current class descriptions for form, content, validity, and ADA, FLSA, EEO compliance, etc.
- 11.2 Discuss any necessary changes to the class description format with the CPM.
- 11.3 Review accuracy of position titles and descriptions regarding unique characteristics of the position, essential job functions, minimum



### 3.2 Breakdown of Study Products

qualifications, working conditions, licensing requirements, on-call requirements, and supervisory requirements.

- 11.4 Review existing County timesheet systems and pay cycle and recommend restructure to simplify process for less manual calculations, avoid overpayment and allow for real time leave information.
- 11.5 Update classification descriptions based on data gathered from the job evaluation process.
- 11.6 Create new class descriptions based on Evergreen's proposed classification structure by leveraging data from the job evaluation process, if available.
- 11.7 Recommend a systematic, regular process for reviewing class descriptions.

#### KEY PROJECT MILESTONES

- Updated class descriptions
- New class descriptions, as needed
- Recommendations for regular review of class descriptions

At the conclusion of the study, Evergreen will deliver a draft and final report that will include the following six chapters.

- **Chapter 1: Introduction** - This chapter provides an introduction into the study and describes the necessary steps that will take place. The major deliverables include a revised project plan, timeline, outreach protocols, document questions, and weekly update reports.
- **Chapter 2: Summary of Outreach** - This chapter provides a summary of any employee meetings and department head interviews. The major deliverables include a summary of outreach results and potential issues for further investigation.
- **Chapter 3: Assessment of Current Conditions** - This chapter provides an overall assessment of the structure of the compensation plan in place of the County and a brief analysis of the employee demographics. The major deliverables include career path analysis, range and rank compression analysis, strengths and weaknesses of the current system, and initial findings.
- **Chapter 4: Market Summary** - This chapter provides results of the market salary survey that was distributed to peer organizations. The major deliverables include a summary of market peers, proposed benchmark jobs, peer survey, extrapolation file for benchmarks to other jobs, and market results by classification.



- 
- **Chapter 5: Benefits Summary** - This chapter provides results of the market benefits survey that was distributed to peer organizations.
  - **Chapter 6: Solution** - This chapter summarizes the proposed recommendations based on the findings from the previous chapters. The recommendations generally include four different categories: *Classification, Overall Structure, Compensation, and Administration*. The major deliverables include report, policy recommendations, and implementation plans.

In addition to the final report, Evergreen will provide a solution file that will include a cost breakdown and implementation strategy for all recommended options for the County in updating its classification and compensation structure. Evergreen will also provide updated and/or new job descriptions in electronic format.

Evergreen will also provide training using its own **JobForce Manager** software that will allow the County to facilitate the implementation and ongoing maintenance of the recommended changes to its classification and compensation system. The County will have access to this software free of charge at the conclusion of the study.





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## *Section 4.0*

### *Study Costs*



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## 4.0 *Study Costs*

Evergreen Solutions, LLC is pleased to present our proposed cost to conduct the Classification and Total Compensation Study for Ashe County. We are committed to providing the highest quality consulting services to our client partners for a reasonable cost. Our firm is fortunate that our overhead is minimal and our expenses are reasonable so we can pass that cost savings on to our clients.

Our total, not-to-exceed, fixed cost to complete all tasks identified in our detailed work plan in **Section 3** of our proposal is **\$31,500**. Our cost is all inclusive, and includes travel costs (meals and lodging), transportation, fringe benefits, indirect costs (overhead), clerical support, and all other out-of-pocket expenses. **Note:** Our cost includes two onsite visits to the County to provide the requested work as most of the work can be performed virtually.

Our preferred invoicing schedule is as follows:

- 25% - upon completion of Tasks 1 – 2
- 25% - upon completion of Tasks 3 – 4
- 25% - upon completion of Tasks 5 – 6
- 15% - upon completion of Tasks 7 – 10
- 10% - upon completion of Task 11

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



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## *Section 5.0*

### *Proposed Implementation Schedule*



## 5.0 *Proposed Implementation Schedule*

Evergreen possesses the ability, staff, skills, and tools to conduct a Classification and Total Compensation Study for Ashe County in four months of the project start date and following the signing of the contract. This implementation schedule is based on a tentative start date of December 1, 2023, and a completion date of March 31, 2024.

Our proposed implementation schedule, as identified in **Exhibit 5-1**, can be modified in any way to best meet the needs of the County.

**Exhibit 5-1**  
**Proposed Implementation Schedule**

PROJECT TASKS	2023	2024		
	DEC	JAN	FEB	MAR
1.0: Project Initiation	■			
2.0: Evaluate the Current System	■			
3.0: Collect and Review Current Environment Data	■			
4.0: Evaluate and Build Projected Classification Plan and Make FLSA Determinations		■		
5.0: Identify List of Market Survey Benchmarks and Approved List of Targets		■		
6.0: Conduct Market Salary and Benefits Survey and Provide External Assessment Summary			■	
7.0: Develop Strategic Positioning Recommendations				■
8.0: Conduct Solution Analysis				■
9.0: Develop and Submit Draft and Final Reports				■
10.0: Develop Recommendations for Compensation Administration				■
11.0: Provide Revised Class Descriptions				■



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## *Section 6.0*

### *Brief Introduction*



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## 6.0 *Brief Introduction*

Evergreen Solutions, LLC is well qualified to conduct a Classification and Total Compensation Study for Ashe County due to our experience in conducting more than 1,200 similar studies for local governments and other public sector organizations across the country, including many in the State of North Carolina. In this section, we provide you with a brief background and history of our firm and the qualifications of our proposed project team. As required by the RFP, we have limited this section to no more than four pages.

### **6.1 Firm's Background and History**

Evergreen Solutions, LLC is a national, multidisciplinary, public sector management consulting firm, which specializes in working with public sector organizations, including hundreds of local governments, across the nation. We provide a unique approach, rather than the "consulting as usual" approach, by partnering with our clients to find innovative, real-world solutions to public management.

Evergreen Solutions was formed in 2004 as a limited liability company to provide a modern, practical alternative to the typical consulting options. The firm is made up of management and human resource professionals as well as strategic partners who came together to form an innovative alternative that places clients and their needs before any individual, model, or corporate goal.

Evergreen's philosophy is based on an understanding that there is not a "one size that fits all" solution to compensation management. Our approach is built on working collaboratively with all parties to make sound, implementation-focused recommendations.

Evergreen is authorized to transact business in the State of North Carolina under the name of Recio/Ling Consulting, LLC (#1654019). Evergreen is located at 2528 Barrington Circle Unit 201, Tallahassee, Florida 32308. Evergreen employs 28 full- and four part-time employees who provide a variety of human resource management consulting.

Our main focus is on people, management, and technology. This focus allows our team to provide a broad variety of services, including, but not limited to: classification studies and total compensation studies; salary market studies; salary and benefits surveys; performance evaluation reviews; workload analyses; staffing studies; disparity studies; HR department audits; training assessments; and strategic planning.

Evergreen Solutions assists public sector professionals in exercising control over the inter-related elements that determine success or failure. We do that by applying a situation-responsive discipline that emphasizes: full visibility into the entire organization through research and discovery; a spirit of partnership with staff and leadership; sound recommendations based on best practices and proven methods; and a practical go-forward plan that leads to quantifiable results.

Collectively, the members of the Evergreen Solutions Team have: extensive experience in conducting classification and total compensation studies for local governments and other public sector organizations throughout the country, including many in the State of North Carolina; comprehensive experience in all components vital to the successful completion of this engagement; knowledge of relevant North Carolina statutes and regulations as well as federal regulations; objectivity and flexibility due to the fact that we have no vested interests; and specialized analytical tools that we bring to the project.



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## 6.2 Proposed Project Team

### Project Principal Dr. Jeff Ling, CCP

In this section, we provide the qualifications of our proposed project team through summary resumes. Detailed resumes are available upon request.

Dr. Jeff Ling is the President of Evergreen Solutions who has been with the firm since its inception in 2004. He is a Certified Compensation Professional (CCP) who has more than 25 years consulting experience in the following areas: human resources; performance improvement; process analysis; strategic planning; statistical analysis; research methodology; data management; surveys and polling; technology analysis; change management; and risk analysis.

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

Dr. Ling has worked with a multitude of clients in the capacity of Project Principal. He has worked on more than 1,200 engagements across the nation which includes work in state and local governments, school districts, institutions of higher education, quasi-governmental agencies, and private industry.

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

### Project Director Mr. Rob Williamson

Mr. Rob Williamson is a Project Manager with Evergreen. He brings more than 20 years of proven leadership experience serving both private and public sector clients. His diverse leadership includes time as a business owner, County Commissioner, CEO of a mid-sized water and wastewater treatment utility, Executive Director of a three-member regional water utility provider, and most recently, Manager of the Florida Association of Counties' 23-county insurance trust.

During his career, Mr. Williamson has served on boards of directors for more than two dozen public, private, civic and charitable organizations. This includes time as Chairman of the Santa Rosa County Board of County Commissioners, RESTORE Council, Tourist Development Council, Florida/Alabama Transportation Planning Organization and as a member of the Florida Gulf Consortium, Florida Association of Counties Executive Board, Leadership Santa Rosa, and the Institute for County Government to name a few. He is also a member of the Florida Rural Water Association.

Mr. Williamson helps organizations create new strategic pathways to solve complex problems. His areas of focus include policy development, strategic planning, change management, government services, transportation planning, master planning, tourism, RESTORE Act implementation and leadership development.

In the State of North Carolina, Mr. Williamson has directed or is currently directing, the following similar studies: a Classification and Compensation Study for the City of Burlington and a Classification and Compensation Study for Dare County.



**Project Consultant  
Mr. Mark Holcombe,  
PMP, SHRM- SCP**

Mr. Williamson has certifications from the Cambridge Leadership Institute and the Kenan-Flagler Business School Leadership Institute and possesses a Bachelor of Science Degree in Sociology from Florida State University.

Mr. Mark Holcombe has more than ten years of management and consulting experience and is recognized as a certified Project Management Professional (PMP) and a SHRM Senior Certified Professional (SHRM-SCP). He has been at Evergreen Solutions nearly seven years, during which time he has promoted through the organization and has led Evergreen's largest local government practice for the past two years. His academic foundation in micro and macroeconomics, combined with his experience leading a business before joining Evergreen, has given him significant experience in leading teams, modeling and controlling costs, and working to provide a product that meets the needs of all stakeholders. This experience has been instrumental in ensuring that his team is able to translate complex and comprehensive data into actionable insights for his clients.

At Evergreen, Mr. Holcombe's emphasis has been in compensation and classification studies of varying size and scope. He has led projects with cities and counties, colleges and universities, K-12 school districts, transportation organizations, and statewide government organizations. Some of his principal areas of expertise are: refining client compensation and classification systems, ensuring alignment with HR best practices and meeting specific client needs; leading initiatives focusing on market competitiveness for large and complex public sector clients; constructing reports and visuals to share complex findings in an approachable way; crafting complex cost models to facilitate accurate budgetary projections for clients; in-depth assessment of market data, synthesizing information from a variety of sources to provide comprehensive compensation insights; redesigning classification systems to modernize and streamline titling conventions for entire organizations or within job families; and conducting reviews centered around gender and racial equity in compensation systems, ensuring their adherence to local, state, and federal laws and regulations.

Mr. Holcombe has directed the following similar studies in the State of North Carolina: a Compensation and Classification Study for Research Triangle Regional Transportation Authority (GoTriangle); a Compensation Study for Chapel Hill-Carrboro City Schools; a Pay Equity Analytics Model for Fire and Police Staff for the City of Raleigh; a Comprehensive Classification and Compensation Study for the City of Fayetteville; a Salary and Compensation Comparability Study for the Raleigh Housing Authority; and a Comprehensive Compensation and Classification Study for Halifax Community College.

Mr. Holcombe holds a Bachelor Degree in Economics with a concentration in Behavioral Economics and Criminology from Florida State University. He also has a SHRM-SCP and PMP certification.

**Project Consultant  
Ms. Brenda Whurr,  
PHR, SHRM- SCP**

Ms. Brenda Whurr, PHR, SHRM-CP, is a Consultant with Evergreen who has more than 15 years of human resource management experience. As a former HR Director in both Florida and North Carolina, she led an HR team with onboarding, payroll processing and day-to-day employee issues; administered leave and workers' compensation; worked with leadership on recruiting strategies and employee relations issues; coordinated open enrollment and other benefits programs; implemented policies and procedures to assist in the transformation of a small company approach to a larger, multi-location company; transitioned the HR Department into a paperless document storage system; developed and implemented a recruiting program; and led initiatives for a Wellness Program and Family Fun Day to increase employee engagement.





**Project Consultant  
Mr. Karl Fuchs**

A sample of some of the public sector projects in the eastern portion of the country that Ms. Whurr has been involved with include: a Classification and Compensation Study for the City of Burlington, NC; a Classification and Compensation Study for the City of Southport, NC; a Classification and Compensation Study for Culpeper County, VA; a Compensation Study for the North Charleston Sewer District, SC; and a Classification and Compensation Study and Analysis for Darlington County, SC.

Ms. Whurr has a Bachelor's of Science in Management Information Systems and possesses a Professional Human Resources certification (PHR) as well as a certification as a professional with SHRM.

Mr. Karl Fuchs is a Senior Consultant with Evergreen with over 25 years of experience serving public sector organizations in various aspects of human resources management. His past roles include Human Resources Director and Plans and Operations Analyst. He is also a Retired Marine Corps Veteran. In addition to his regular duties while serving as a Human Resources Director, he successfully implemented creative recruiting and retention strategies which lessened time to hire and lengthened retention, especially in hard to fill positions. He streamlined and updated legacy processes and provided remedies for classification and compensation of non-bargaining unit employees.

Mr. Fuchs was a Plans and Operations Analyst working under DoD contract where he provided subject matter expertise on operational manpower and employment of U. S. Marine forces in the Middle East. He developed staffing requirements for Contingency Plans, multi-national joint exercises, and the deployment and redeployment of forces conducting combat operations. He also supervised staff in various HR roles such as pay management, employee recognition, and official travel.

While Mr. Fuchs was on active duty, he served in various capacities focusing on talent management and development. He also volunteered for assignments as DEI manager. He led and maintained compliance of programs including HRIS, pay/entitlements, promotions, limited duty, workplace investigations, performance management, employee recognition, corporate charge card, official travel, equal opportunity, separations/retirements, personnel accountability, and casualty affairs. Over the course of his career, he participated in training the Moroccan, Jordanian, and Afghan militaries.

A sample of some of the public sector projects that Mr. Fuchs has been involved with in the eastern portion of the country include: a Total Compensation and Classification Study for Cumberland County, PA; a Classification and Compensation Study for The Community Colleges of Baltimore County, MD; a Compensation and Classification Study for Howard County, MD; a Compensation Study for the City of Baltimore, MD; a Classification and Compensation Study for Garrett County, MD; a Staffing Study for Rock Hill Schools, SC; a Classification and Compensation Study for the City of Mauldin, SC; and a Classification and Compensation Study for Richland County, SC.

Mr. Fuchs earned his Juris Master from Florida State University, College of Law and Bachelor of Arts in Business Administration specializing in Management from Saint Leo University. He is currently working on a Master's in Public Administration focusing on Local Government Management.



**Note:** A team of experienced analytical and clerical support staff will contribute to this study, as needed.



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## *Section 7.0*

### *Client References*



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## 7.0 Client References

In this section, we provide you with a list of similar projects we have conducted or are currently on contract to conduct as well as a list of references.

### 7.1 Select Relevant Experience

Clients nationwide have been successfully implementing recommendations from our team of professional consultants for decades. Evergreen Solutions has contracted with public sector, quasi-governmental, and non-profit organizations in 47 states throughout the country. **Exhibit 7-1** includes a list of the public sector clients we have worked with in the State of North Carolina providing a variety of human resource and management consulting work.

Because Evergreen has conducted more than 1,200 projects since its inception that are similar in scope to the services being requested by Ashe County, we have included in this section only a sample of some of our local government work.

#### **Position Analysis and Revision Project Harnett County, North Carolina**

Evergreen Solutions was retained by Harnett County to conduct a Position Analysis and Revision Project. Evergreen's consultants conducted an analysis of current County positions to determine the plan of action, whether to completely recreate the descriptions or to possibly update those that were more current, resulting in a consistent format for all descriptions. Evergreen then made recommendations regarding the process; provide implement options; provided recommendations and training for best practices to maintain up-to-date descriptions going forward; advised the County regarding FLSA Exempt/Nonexempt status for all updated job descriptions; and assessed the County positions to determine any opportunities for consolidation of existing positions and job descriptions.



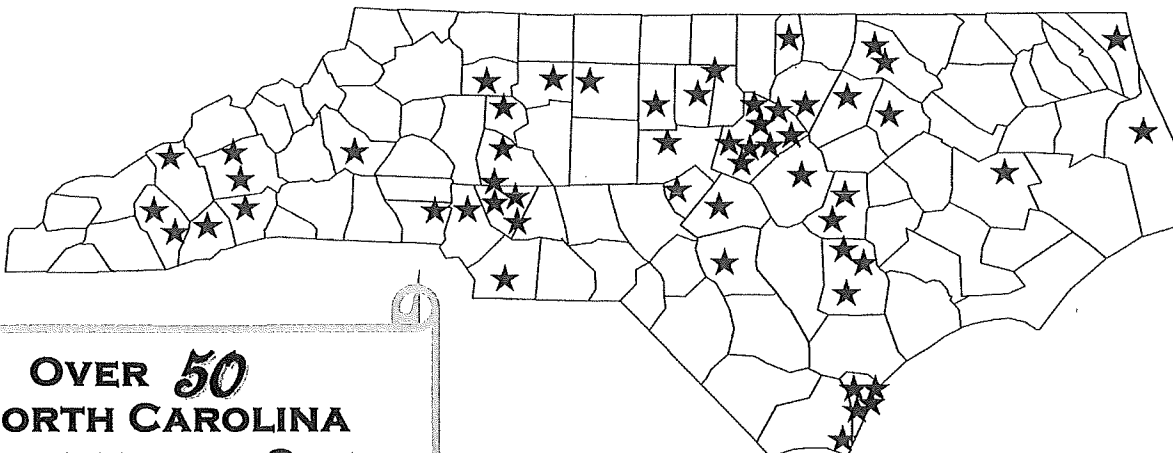
#### **Pay and Classification Study Buncombe County, North Carolina**

Evergreen Solutions was retained by Buncombe County to conduct a Pay and Classification Study. Evergreen Solutions conducted a classification analysis using Evergreen Solutions' Job Assessment Tool job evaluation methodology in addition to a statistical assessment of current conditions. Evergreen Solutions also analyzed local market and benefits data taken from peer organizations to determine the appropriate compensation levels for benchmark positions. Recommendations for adjustments to the compensation and classifications plan were made and procedures for the continued maintenance of the plans were provided. **Note:** Evergreen was again hired in 2023 to conduct a Compensation Plan update.



## Exhibit 7-1: North Carolina Clients

Alamance-Burlington School System	Franklin County
Alliance Health	Gaston County
Beaufort County Schools	Guilford County
Buncombe County	Halifax Community College
Brunswick County	Harnett County
Burke County	Haywood County
Cabarrus County Schools	Housing Authority of Winston Salem
CAHEC	Jackson County
Cape Fear Public Utility Authority	Land-of-Sky Regional Council
Chapel Hill-Carrboro City Schools	Lincoln County Schools
Charlotte Water	Lee County
Chatham Public Schools	Nash-Rocky Mount Schools
City of Burlington	New Hanover County
City of Fayetteville	North Carolina League of Municipalities
City of Goldsboro	Raleigh Housing Authority
City of Hendersonville	Research Triangle Regional Transportation Authority (Go Triangle)
City of Rocky Mount	Robeson Community College
City of Raleigh	State Employees Association of North Carolina
City of Southport	Town of Carolina Beach
City of Wilmington Housing Authority	Town of Clayton
County of Davie	Town of Huntersville
County of Halifax	Transylvania County
County of Harnett	Union County
Currituck County Schools	Vance County
Dare County	Wake Technical Community College
Duplin County	Wayne County Schools
Duplin County School District	Yadkin County
Durham County	Wayne County Schools
Duplin County School District	



**OVER 50  
NORTH CAROLINA  
PROJECTS AND OVER  
1200 NATIONWIDE**

