

**CONTRACT FOR CONSULTANT SERVICES BETWEEN
THE CITY OF WATSONVILLE AND
RALPH ANDERSEN & ASSOCIATES**

THIS CONTRACT, is made and entered into this _____, by and between the **City of Watsonville**, a municipal corporation, hereinafter called "City," and **Ralph Andersen & Associates**, hereinafter called "Consultant."

WITNESSETH

WHEREAS, the City needs to obtain certain professional, technical and/or specialized services of an independent contractor to assist the City in the most economical manner; and

WHEREAS, Consultant has represented that consultant has appropriate skill, training, qualifications, and experience to render such services called for under this Contract to City.

THE PARTIES HEREBY AGREE AS FOLLOWS:

SECTION 1. SCOPE OF SERVICES. Consultant shall perform those services described in detail in Exhibit "A," entitled "SCOPE OF SERVICES" which exhibit is attached hereto and incorporated herein.

SECTION 2. TERM OF CONTRACT. The term of this Contract shall be from March 25, 2024 through December 31, 2024, inclusive.

SECTION 3. SCHEDULE OF PERFORMANCE. The services of Consultant are to be completed according to the schedule set out in Exhibit "B," entitled "SCHEDULE OF PERFORMANCE," which is attached hereto and incorporated herein. Consultant will diligently proceed with the agreed Scope of Services and will provide such services in a timely manner in accordance with the "SCHEDULE OF PERFORMANCE."

SECTION 4. COMPENSATION. The compensation to be paid to Consultant including both payment for professional services and reimbursable expenses as well as the rate and schedule of payment are set out in Exhibit "C" entitled "COMPENSATION," which is attached hereto and incorporated herein. This amount shall not exceed \$95,800 (Ninety-Five Thousand Eight Hundred Dollars).

SECTION 5. METHOD OF PAYMENT. Except as otherwise provided in Exhibit "C," each month, Consultant shall furnish to the City a statement describing the work performed for compensation during the preceding month. Such statement shall also include a detailed record of the month's actual reimbursable expenditures.

SECTION 6. INDEPENDENT CONSULTANT. It is understood and agreed that Consultant, in the performance of the work and services agreed to be performed by

Consultant, shall act as and be an independent Consultant and not an agent or employee of City, and as an independent Consultant, shall obtain no rights to retirement benefits or other benefits which accrue to City's employees, and Consultant hereby expressly waives any claim it may have to any such rights.

SECTION 7. ASSIGNABILITY. Consultant shall not assign or transfer any interest in this Contract nor the performance of any of Consultant's obligations hereunder, without the prior written consent of City, and any attempt by Consultant to so assign this Contract or any rights, duties or obligations arising hereunder shall be void and of no effect.

SECTION 8. INDEMNIFICATION. Consultant represents that Consultant has the expertise and experience necessary to perform the services and duties agreed to be performed by Consultant under this Contract, and City is relying upon the skill and knowledge of Consultant to perform said services and duties. Consultant agrees to defend, indemnify and hold harmless City, its officers, agents, and employees, against any loss or liability arising out of or resulting in any way from work performed by or on behalf of Consultant under this Contract or the errors or omissions by Consultant.

SECTION 9. INSURANCE.

A. Auto and Commercial General Liability Insurance. Consultant shall also maintain in full force and effect for the term of this Contract, automobile insurance and commercial general liability insurance with an insurance carrier satisfactory to City, which insurance shall include protection against claims arising from bodily and personal injury, including death resulting therefrom, and damage to property resulting from any actual occurrence arising out of the performance of this Contract. The amounts of insurance shall not be less than the following:

(1) Commercial general liability insurance, or equivalent form, with a combined single limit of not less than \$1,000,000.00 per occurrence. If such insurance contains a general aggregate limit, such limit shall apply separately to each project Consultant performs for City. Such insurance shall (a) name City, its appointed and elected officials, and its employees as insureds; and (b) be primary with respect to insurance or self-insurance programs maintained by City and (c) contain standard separation of insured's provisions.

(2) Business automobile liability insurance, or equivalent form, with a combined single limit of not less than \$1,000,000.00 per occurrence. Such insurance shall include coverage for owned, hired and non-owned automobiles.

B. Workers' Compensation Insurance. In accordance with the provisions of Section 3700 of the Labor Code, Consultant shall be insured against liability for Workers' Compensation or undertake self-insurance. Consultant agrees to comply with such provisions before commencing performance of any work under this Contract.

C. Proof of Insurance to City before Notice to Proceed to Work. Consultant shall satisfactorily provide certificates and endorsements of insurance to the City Clerk before Notice to Proceed to Work of this Contract will be issued. Certificates and policies shall state that the policy shall not be canceled or reduced in coverage without thirty (30) days written notice to City. Approval of insurance by City shall not relieve or decrease the extent to which Consultant may be held responsible for payment of damages resulting from services or operations performed pursuant to this Contract. Consultant shall not perform any work under this Contract until Consultant has obtained the required insurance and until the required certificates have been submitted to the City and approved by the City Attorney. If Consultant fails or refuses to produce or maintain the insurance required by these provisions, or fails or refuses to furnish City required proof that insurance has been procured and is in force and paid for, City shall have the right at City's election to forthwith terminate this Contract immediately without any financial or contractual obligation to the City. As a result of such termination, the City reserves the right to employ another consultant to complete the project.

D. Written notice. Contractor shall provide immediate written notice if (1) any insurance policy required by this Contract is terminated; (2) any policy limit is reduced; (3) or any deductible or self insured retention is increased.

SECTION 10. NON-DISCRIMINATION. Consultant shall not discriminate, in any way, against any person on the basis of age, sex, race, color, creed, national origin, or disability in connection with or related to the performance of this Contract.

SECTION 11. TERMINATION.

A. City and Consultant shall have the right to terminate this Contract, without cause, by giving not less than ten (10) days written notice of termination.

B. If Consultant fails to perform any of its material obligations under this Contract, in addition to all other remedies provided by law, City may terminate this Contract immediately upon written notice.

C. The City Manager is empowered to terminate this Contract on behalf of City.

D. In the event of termination, Consultant shall deliver to City copies of all work papers, schedules, reports and other work performed by Consultant and upon receipt thereof, Consultant shall be paid in full for services performed and reimbursable expenses incurred to the date of termination.

SECTION 12. COMPLIANCE WITH LAWS. Consultant shall comply with all applicable laws, ordinances, codes and regulations of the federal, state and local governments. Consultant shall obtain and maintain a City of Watsonville business license during the term of this Contract.

SECTION 13. GOVERNING LAW. City and Consultant agree that the law governing this Contract shall be that of the State of California. Any suit brought by either party against the other arising out of the performance of this Contract shall be filed and maintained in the Courts of the County of Santa Cruz.

SECTION 14. PRIOR CONTRACTS AND AMENDMENTS. This Contract represents the entire understanding of the parties as to those matters contained herein. No prior oral or written understanding shall be of any force or effect with respect to those matters covered hereunder. This Contract may only be modified by a written amendment.

SECTION 15. CONFIDENTIAL INFORMATION. Except as may be required by law, all data, documents, discussions, or other information developed or received by or for Consultant in performance of this Contract are confidential and not to be disclosed to any person except as authorized by the City Manager.

SECTION 16. OWNERSHIP OF MATERIALS. All reports, documents or other materials developed or received by Consultant or any other person engaged directly by Consultant to perform the services required hereunder shall be and remain the property of City without restriction or limitation upon their use.

SECTION 17. COVENANT AGAINST CONTINGENT FEES. The Consultant covenants that Consultant has not employed or retained any company or person to solicit or secure the Contract, and that Consultant has not paid or agreed to pay any company or person, any fees, commissions, percentage, brokerage fee, gift, or any other consideration contingent on or resulting from the award or making of this Contract. For breach or violation of this covenant, the City shall have the right to annul this Contract without liability, or in its discretion, to deduct from the contract price or consideration or otherwise recover, the full amount of such fee, commission, percentage fee, gift, or contingency.

SECTION 18. WAIVER. Consultant agrees that waiver by City or any one or more of the conditions of performance under this Contract shall not be construed as waiver of any other condition of performance under this Contract.

SECTION 19. CONFLICT OF INTEREST.

A. A Consultant shall avoid all conflict of interest or appearance of conflict of interest in performance of this Contract. Consultant shall file a FPPC Form 700 disclosure statement, which form shall be filed with the City Clerk within thirty (30) days from the effective date of this Contract as applicable.

B. No member, officer, or employee of the City, during their tenure, or for one (1) year thereafter, shall have any interest, direct or indirect, in this Contract or the proceeds thereof and Consultant agrees not to allow, permit, grant, transfer, or

otherwise do anything which will result in such member, officer, or employee of the City from having such interest.

SECTION 20. AUDIT BOOKS AND RECORDS. Consultant shall make available to City, its authorized agents, officers and employees, for examination any and all ledgers and books of account, invoices, vouchers, canceled checks and other records or documents evidencing or related to the expenditures and disbursements charged to the City, and shall furnish to City, its authorized agents and employees, such other evidence or information as City may require with respect to any such expense or disbursement charged by Consultant.

SECTION 21. NOTICES. All notices shall be personally served or mailed, postage prepaid, to the following addresses, or to such other address as may be designated by written notice by the parties:

CITY

City Clerk's Office
275 Main Street, Suite 400
Watsonville, CA 95076
(831) 768-3040

CONSULTANT

Heather Renschler
Ralph Andersen & Associates
5800 Stanford Ranch Rd., Ste. 410
Rocklin, CA 95765
(916) 630-4900

SECTION 22. EXHIBITS:

- Exhibit A: Scope of Services
- Exhibit B: Schedule of Performance
- Exhibit C: Compensation

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WITNESS THE EXECUTION HEREOF, on the day and year first hereinabove written.

CITY

CONSULTANT

CITY OF WATSONVILLE

BY

Rene Mendez, City Manager

BY 

Heather Renschler, President/CEO

ATTEST:

BY

Irwin I. Ortiz, City Clerk

APPROVED AS TO FORM:

BY

Samantha W. Zutler, City Attorney

EXHIBIT "A"

SCOPE OF SERVICES

See Attached Proposal from Consultant dated January 12, 2024

EXHIBIT "B"

SCHEDULE OF PERFORMANCE

Services shall commence immediately upon execution of this Contract. All services performed under the provisions of this Contract shall be completed in accordance with the following schedule:

EXHIBIT "C"

COMPENSATION

- a. Total Compensation. The total obligation of City under this Contract shall not exceed \$95,800 (Ninety-Five Thousand Eight Hundred Dollars).
- b. Basis for Payment. Payment(s) to Consultant for services performed under this contract shall be made as follows and shall [not] include payment for reimbursable expenses:
- c. Payment Request. Consultant shall submit a request for payment for services on a monthly basis by letter to Director, or said Director's designated representative. Such request for payment shall cover the preceding monthly period during the term hereof, shall note the City's purchase order number for this contract, shall contain a detailed listing of the total number of items or tasks or hours for which payment is requested, the individual dates on which such services were rendered, and invoices for reimbursable expenses, if any. Upon receipt in the Office of Director of said payment request, Director shall cause payment to be initiated to Consultant for appropriate compensation.



5800 Stanford Ranch Road
Suite 410
Rocklin, California 95765
916.630.4900

January 12, 2024

Ms. Nathalie Manning
Deputy City Manager
City of Watsonville
275 Main Street, Suite 400
Watsonville, California 95076

Via Email: nathalie.manning@watsonville.gov

Dear Ms. Manning:

We are pleased to submit our proposal to conduct a citywide Classification and Compensation Study. The scope of the study will include 400 full-time employees and approximately 175 job classifications. To facilitate your review, the proposal includes the following:

- **Experience/Background** – A summary of the firm, proposed staff, and our expertise in conducting classification and compensation studies.
- **Agents and Addresses** – Resumes of staff that will work on this project.
- **Statement of Methods and Procedures** – A summary of methodologies and proposed tasks to accomplish the study's objectives and anticipated end-products.
- **Structure and Content of Work Product** – Anticipated project deliverables.
- **Work Schedule** – A proposed schedule.
- **Fees** – A fixed cost for the proposed project as well as hourly rates.
- **References** – References for similar studies conducted by the firm.

I am certain that you will find our work plan is responsive to each of your study objectives, and our reputation and experience are unmatched in successfully completing consulting engagements of this nature. Ralph Andersen & Associates is a leader in providing local government consulting services and has successfully completed hundreds of classification and compensation studies.

The full resources of the firm will be available to perform consulting services for the duration of the project. Doug Johnson, Vice President, will be the Project Manager for this engagement and will have the assistance of an experienced consulting team. If you have any questions or need additional information, please do not hesitate to contact Mr. Doug Johnson at (916) 630-4900. We look forward to the opportunity to work with you on this important assignment. This proposal will remain valid for 90 days.

Sincerely,

Heather Renschler
President/CEO

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Experience & Background

Ralph Andersen & Associates is a recognized leader in providing a full range of management consulting services to cities, counties, special districts, educational institutions, and non-profit organizations. The firm has a long tradition of providing a customized approach that uniquely meets the specific objectives of the organization. Our consultants are practitioners in the latest methods used for data collection, analysis, and application in developing classification and compensation plans. Our proposal provides you with a thorough understanding of our approach to the study and is based upon:

- Our unmatched experience in human resource consulting; Ralph Andersen & Associates continues a 52-year tradition of providing quality consulting services to local government agencies
- The proven track record of our staff working with cities and public agencies throughout California
- Our ability to design and implement creative and tailored classification and compensation systems; we believe in customizing our products and systems to meet specific policy objectives
- Comprehensive data analysis and reporting; our firm has experts in data analysis using spreadsheet applications to guarantee efficiency and a highly customized approach
- Successful study engagements involving elected officials, study committees, management staff, labor representatives, and general employees; we understand the importance of building consensus among study participants
- Our commitment, sensitivity, and responsiveness to completing quality products on time and within budget.

The firm provides human resource consulting services to clients of all sizes and types, with special expertise in meeting the unique needs of public sector agencies. Our results-oriented approach and methodologies produce recommendations that are directly responsive to our clients' needs and are easily implemented and maintained over time.

Our proposal provides you with detailed information regarding the background of the firm, our consulting staff, project methodologies, a proposed work plan, project timing, and other additional information requested by the City. A summary of this information is as follows:

- **The Firm** – The project team assigned to this project have performed hundreds of similar compensation studies for clients throughout California and the Western United States. Doug Johnson, Vice President, will serve as the project manager and will be assisted by Jeff McMurdo who will perform data collection duties. The full resources of the firm will be available to ensure successful and timely completion of the project.
- **Methodologies** – The firm has successfully developed proven methodologies that will meet all of the policy/project goals identified by the City. Our approach is

tailored to ensure the project work plan and deliverables meet all of the study objectives in a cost effective and timely manner.

- **Timeline** – Our work plan completes all study tasks within a twelve-week timeline which meets the City’s completion requirements. We have an outstanding track record at completing compensation studies with the full participation of survey agencies.

Ralph Andersen & Associates will not be using any subcontractors/consultants for this project with all work being performed by full-time staff members. The firm is an Equal Opportunity Employer and is not only committed to non-discriminatory practices but also conducts significant outreach efforts through internships and college foundation programs.

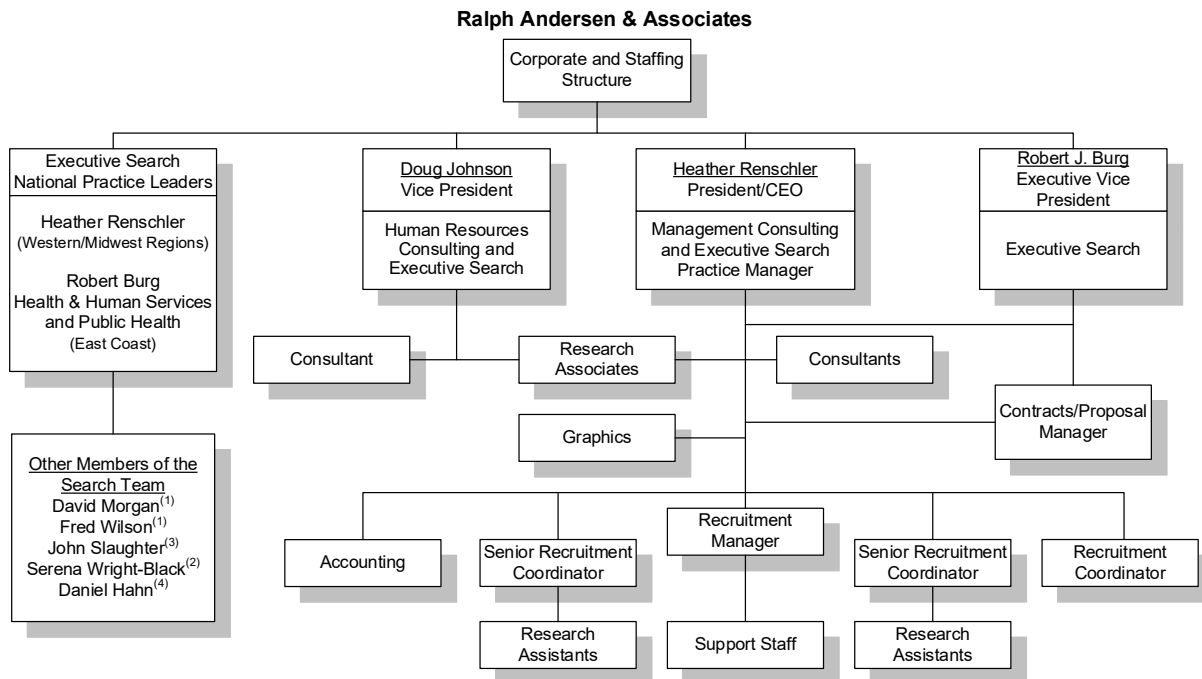
Agents and Addresses

The Firm

Ralph Andersen & Associates has over 51 years of local government consulting experience serving the needs of cities, counties, utilities, special districts, community colleges, schools, non-profit organizations, and state governments. Key service areas of the firm include:

- Human Resources Consulting
- Executive Search
- Management Consulting.

Ralph Andersen & Associates serves a nationwide clientele through its Corporate Office in the Sacramento area (Rocklin, California). A multi-disciplined, full-service local government consulting organization, Ralph Andersen & Associates is dedicated to helping our clients improve operating efficiency and organizational effectiveness. The firm employs 14 full-time staff, 3 part-time staff, and has additional contractors and affiliations as needed to provide a full range of services.



⁽¹⁾Former City Manager
⁽²⁾Former Assistant City Manager
⁽³⁾Former County Manager
⁽⁴⁾Former Chief of Police

For this project, staff from the firm's human resources practice will provide the consulting services. The human resource practice focuses on those services that are not easily provided by in-house human resources staff. Key services include:

- **Classification Studies** – These projects include job analysis, class plan development, position allocation, career ladders, class specifications, FLSA analysis, ADA compliance, and related analysis.
- **Compensation Studies** – The firm provides a full range of compensation services including labor market selection, base salary and benefit surveys, private-public data comparisons, benchmark selection, and internal relationship analysis.
- **Expert Testimony and Arbitration Support** – The firm has had significant experience providing technical support in arbitration and mediation hearings and has significant experience working with labor and management groups. This expertise includes the selection of comparable agencies and the elements of compensation appropriate for labor market surveys.
- **Job Evaluation Systems** – In addition to having a copyrighted Point Factor Job Evaluation System, the staff of Ralph Andersen & Associates have significant expertise in developing customized job evaluation systems and “hybrid” solutions.
- **Performance Management Programs** – Performance management serves as a foundation for measuring/tracking organization and employee performance. We have several standard systems that have demonstrated success in a variety of public agencies. In addition, Ralph Andersen & Associates can develop tailored performance management systems to fit the unique needs of our clients.
- **Pay-for-Performance/Incentive Programs** – Ralph Andersen & Associates is a leader in developing effective pay-for-performance programs for public agencies including merit progression systems, lump sum and incentive programs, and other mechanisms tied to employee or organizational measurement criteria.
- **Technical Assistance** – Ralph Andersen & Associates also provides a full range of hourly technical assistance including conducting job audits, support for labor relations, and expert testimony.

Additional information about the firm's services and background can be found at our web site at www.ralphandersen.com.

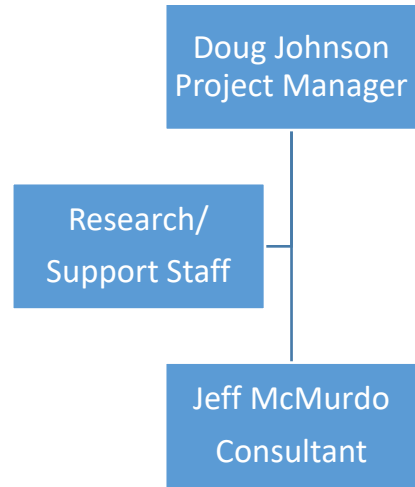
Project Team

Consultants, complemented by consulting firms, define the difference between success and failure in projects of this nature. Ralph Andersen & Associates understands that selection of a project team with the right mix of skills and experience is the most important decision that will be made during the study. The team must be well led and the project well managed if the study objectives are to be achieved.

In defining the project team for this engagement, consideration of the current workload of all consulting staff was taken into account to ensure our ability to fully meet your stated needs and objectives. Doug Johnson, Vice President, will serve as the Project Manager and will have responsibility for all primary contact with the City as well as all on-site

review meetings and presentations. Mr. Johnson has managed hundreds of consulting engagements including large public agencies throughout California and the United States. The staffing for this project will include:

- **Doug Johnson, Vice President** – Mr. Johnson will serve as the Project Manager and will conduct all on-site meetings, prepare all written reports, and serve as chief analyst on the project. He is the firm’s most experienced Project Manager and has expertise in working with special districts, cities, and other local government agencies similar to the City involving complex classification and compensation issues.
- **Jeff McMurdo, Consultant** – Mr. McMurdo is the most experienced consultant at the firm and has extensive experience conducting employee interviews, developing classification recommendations, developing job descriptions, and collecting and analyzing market data.



All staff members are available for the scheduled duration of the project. Anticipated workloads for all staff have been considered in assigning staff to this project. The firm’s staffing and project management systems allow for multiple studies to be conducted simultaneously without impacting the completion dates of the project. Brief staff resumes are provided below.

Staff Resumes



Doug Johnson, Vice President

Mr. Johnson is currently a Vice President with Ralph Andersen & Associates and has 36 years of local government consulting experience. Mr. Johnson has 20 years of experience with Ralph Andersen & Associates in addition to 13 years as President of Johnson & Associates, some human resources consulting firm. Mr. Johnson is the firm’s expert in job analysis, market comparability, compensation, benefits, and related matters. He has served as an expert witness in arbitration proceedings and mediation sessions, mostly involving police and fire issues. He has extensive experience working with elected officials, public executives, staff members, labor organizations, and ad-hoc committees. He leads the firm’s human resource consulting services and participates in all facets of the firm’s recruitments.

Mr. Johnson’s expertise includes consulting experience with public agencies throughout the United States including cities, counties, utilities, community colleges, school districts, special districts, nonprofit organizations, and private companies. Mr. Johnson has

provided consulting assistance to hundreds of public sector agencies and is a recognized expert in compensation issues. Specific areas of expertise include:

- Job classification studies
- Job evaluation system design and implementation
- Pay plan development and administration
- Market comparability research and analysis
- Total compensation analysis
- Private sector data analysis
- Performance management.

Mr. Johnson's experience includes serving as project manager and chief analyst for hundreds of local government agencies. Recent municipal projects include the cities of Auburn, Red Bluff, South Lake Tahoe, Redondo Beach, Sacramento, St. Helena, Hermosa Beach, Simi Valley, Paramount, Signal Hill, Port Hueneme, Lake Forest, and Union City.

Mr. Johnson holds a Bachelor of Arts degree in Psychology with a minor in Communication Studies from California State University, Sacramento. His course work emphasized organizational development and performance incentives. He is an active member of WorldAtWork, The Total Rewards Association.



Jeff McMurdo, Consultant

Mr. McMurdo has over 22 years of human resources consulting experience and serves on a variety of project consulting teams focusing on classification and compensation plan development. He is an experienced classification analyst and has developed hundreds of classification plans in addition to ad-hoc reclassification and targeted classification studies for large and small organizations. His duties also include leading and participating in total compensation studies including comprehensive market research, data collection, data

analysis, and data presentation. Key responsibilities of Mr. McMurdo include:

- Conducting job analysis interviews, analyzing positions and job classifications, and preparing job descriptions.
- Designing survey data collection forms, questionnaires, and related instruments.
- Market survey research including the review and analysis of budgets, organization charts, MOUs, job descriptions, salary schedules, and benefit documents.
- Data compilation including job comparability, range structure analysis, benefit data, and related survey information.

He has conducted over a hundred compensation surveys including recent surveys for the cities of Auburn, Red Bluff, South Lake Tahoe, Redondo Beach, Sacramento, St. Helena, Hermosa Beach, Simi Valley, Paramount, Signal Hill, Port Hueneme, Lake Forest, and Union City. Mr. McMurdo holds a Bachelor of Science degree in Business Administration

from California State University, Sacramento. His course work emphasized human resource management.

Additional firm resources, including support staff and project consultants, will be available to ensure successful and timely completion of the study.

Ralph Andersen & Associates staffs projects with full-time consultants that are employees of the firm. No sub-contractors will be used for this project.

Statement of Methods and Procedures

Project Understanding

The City of Watsonville is interested in conducting a Classification and Compensation Study involving all City employees and job classifications.

To ensure that the City's objectives are met, the following key study components and anticipated end-products are included in the work plan developed by Ralph Andersen & Associates.

- Conduct a meeting with City representatives at project initiation to confirm the study goals, objectives, and deliverables
- Conduct briefing sessions with employees at the beginning of the study to explain the study process and answer questions
- Conduct an extensive review of background documents
- Distribute job analysis questionnaires and conduct supplemental interviews with a sampling of employees in the study
- Develop classification recommendations, FLSA designations, and update job descriptions
- Review historical practices and recommended survey agencies, survey job classifications, and identify data collection needs
- Conduct a custom salary and benefit survey and analyze the market data
- Conduct internal relationship analyses, survey benchmarking, and develop salary range recommendations for all City job classifications
- Develop draft and final reports incorporating all study recommendations and supporting data including implementation plans
- Conduct a classification and compensation review and appeal process to fully resolve all classification issues and recommendations
- Present the findings to managers, employees, labor representatives, project committees, and the City Council, as needed.

Ralph Andersen & Associates has a strong commitment to develop and implement customized and tailored classification and compensation systems. While we have broad expertise and experience from hundreds of successful consulting assignments, we are committed to a "customer service" approach to all of our client engagements. This assures the preparation of study end-products that are uniquely customized to the City of Watsonville.

Ralph Andersen & Associates will apply several technical and administrative methodologies in creating the City's updated compensation systems. An overview of all key methodologies is described below.

Background Data Analysis

The consultant team will identify a wide range of background data that will be collected from the City as part of the study. The consultant team will provide the City with a complete list of background needs upon initiation of the project.

Materials collected and reviewed during this initial stage of the project will, at a minimum, include:

- Organization charts
- Planning documents
- Existing class specifications
- Budgets
- Current pay plan and related salary schedules
- Benefits summaries
- Memorandums of Understanding
- Relevant administrative rules and procedures.

These materials provide an understanding of the City's personnel system and of current applicable policies and procedures.

Job Analysis Questionnaires

Project consultants will distribute a Job Analysis Questionnaire (JAQ) to all study employees identified for analysis in the classification phase of the study. Two versions of the questionnaire will be used with one focusing more on job description updates while the other will be used for more detailed analysis of issue areas. The questionnaire provides an opportunity for employees to fully describe the duties and responsibilities of their position and provides the information necessary to resolve classification issues including job function consolidation resulting from workforce reductions. The questionnaire is also designed to record data regarding other job-related information such as the knowledge, skills, abilities, and physical requirements necessary to perform the work, as well as supervisory and managerial responsibilities.

Each questionnaire will be reviewed by the employee's supervisory and managerial staff to ensure completeness and accuracy. Once completed, they will be forwarded to the consultants for examination prior to conducting job analysis interviews. The questionnaire will be distributed and explained in detail during an employee briefing session at the initiation of the project. All questionnaires used by Ralph Andersen & Associates can be tailored to the specific objectives of the study and the unique organizational characteristics of the City.

Job Analysis Interviews

As a supplement to the questionnaires, project consultants will conduct interviews with at least one employee in each classification, a sampling of employees in multiple position classifications, all employees requesting an interview, and employees where significant classification issues are identified during project initiation tasks. This will ensure that the consultants are able to obtain information regarding any existing job classification issues as well as confirm job duties and tasks performed.

Compensation Policy Development

This methodology relates to the identification and documentation of the City's compensation philosophies, policies, and procedures. The consulting team will confirm specific policies, both implicit and explicit, and assess their impact on the City's overall ability to attract, recruit, employ, advance, and retain high quality personnel. These policies and practices will include the relative labor market position the City seeks to maintain in the competitive labor market, the types of employers with which the City chooses to compete, and the relative importance placed on internal equity vs. market forces in the development of the salary plan. This assessment can be conducted through meetings with managers or with broader input using a workshop session that includes project team members, managers, labor representatives, and the City Council.

Compensation Data Collection and Analysis

The methodology utilized in collecting and analyzing compensation data involves an extensive process to ensure accuracy, reliability, and completeness. Ralph Andersen & Associates does not rely on published or previously collected data; all data is collected personally by the consulting team, who have, based on the classification analysis, an in-depth knowledge and understanding of the survey classifications.

Supporting our approach to labor market surveys, this component of the study will include the development of a comprehensive survey packet, the collection of base salary, salary structure, and optional total compensation data through written and electronic materials and telephone calls, and the analysis of the data at the survey market mean, median, and requested percentiles.

Project Tasks

Task 1 – Project Kick-off Meetings

The consultants will begin all administrative and coordinative efforts in support of the project initiation meetings and briefings. Among other things, this will include:

- Preparation of a project schedule
- Identification and review of background data including existing class specifications, organization charts, budgets, employee listings, salary schedules, and related information

- Identification of scheduling parameters for meetings and interaction with various City employee groups.

This initial step in the study process will be used to identify significant classification and compensation concerns that should be addressed during the course of the study. The consultants will discuss the best approach for identifying issue areas including an independent assessment of the current classification plan by the consultant, input by human resources staff, and input from managers, labor representatives, and other stakeholders.

The consultants will meet with the City's project manager and other staff as appropriate to ensure a full understanding of project objectives and deliverables. The project work plan and schedule will be adapted to achieve the objectives.

Initial project meetings will also include employee orientation and briefing sessions in relation to the study process, timing, and objectives.

Task 2 – Employees Complete Questionnaires

The JAQ provides employees with an opportunity to describe the duties and responsibilities of their positions with an emphasis on job related information such as knowledge, skills, abilities, and physical capabilities required to perform the work assigned. Space is also provided on the questionnaire for employees to make any additional comments they wish. The completed questionnaires are reviewed by supervisory and managerial staff, with space provided for their comments. A short form questionnaire will be available to all employees to provide updated information regarding assigned duties. A more detailed questionnaire will be used for positions and classifications where specific issues or questions have been identified. A sample JAQ is provided in Appendix B.

Task 3 – Conduct Job Analysis Interviews

Prior to conducting interviews, the consultants will thoroughly review the completed questionnaires. The consultants will evaluate position duties and responsibilities, classification series, class titles, job families, reporting relationships, and internal relationships. Based on this preliminary analysis, the project team will identify areas of concern that will be clarified or probed during the job analysis interviews.

The consultants will assume responsibility for the preparation of the employee interview schedule. The City's Project Manager, or designee, will be responsible for scheduling interview rooms, notifying employees, and related coordinative activities. We anticipate interviewing all employees where significant position classification issues exist, and a sampling of employees beyond the issue areas.

Task 4 – Prepare and Review Preliminary Classification Report

With the completion of the employee interviews, a preliminary classification report will be prepared. Key components of the preliminary report will include:

- Identification of all key issues identified in the classification analysis

- Recommended job titles
- Employee allocations.

In preparing the preliminary classification report, each position is analyzed according to the criteria set forth at initial review meetings. Such criteria typically will include factors relating to job knowledge, experience, training, decision making, management control, working conditions, and outside contacts. Like positions are grouped into tentative classes forming the basis for initial class definition.

The preliminary classification report will be reviewed with key management staff prior to preparing class specifications. Because the concepts provide the foundation for the resulting classification plan, management review of the recommendations in their respective areas of responsibility is essential.

Task 5 – Prepare Class Specifications

Once the preliminary classification recommendations have been reviewed, the project consultants will revise, update, or create new class specifications based on the issues identified in previous tasks. The City’s current job description format will be maintained as appropriate. The class specifications will be drafted and undergo a management/employee review process to ensure they accurately and adequately describe the scope of responsibilities. Once finalized, they will be provided to the City in both an electronic and hard-copy format. This process will include FLSA analysis and designation.

Task 6 – Undertake Management/Employee Review Process

As an important component of the overall classification study, the project consultant team will provide additional opportunities for employee participation and input through the conduct of an employee review process. These steps will (1) build and facilitate the City’s understanding of the newly developed classification plan, (2) enhance employee commitment and understanding of the recommended system by giving each employee the opportunity to comment on the system and (3) ensure that the consultants receive as much information as possible regarding the nature and responsibilities of the various positions in order to make appropriate and equitable final classification recommendations. The various subtasks within this portion of the project are as follows.

Task 6.1 – Distribute class specifications to all employees included within the study scope – Each employee will receive an individual copy of the specification for the class to which his/her position has been allocated along with a Position Allocation Notice and Employee Review Form. This will provide employees with an opportunity to review and comment on their proposed classification and allocation. These comments will then be forwarded to management for review and comment.

Task 6.2 – Review written comments received from employees – All written comments or suggestions from employees regarding the recommended class plan will be thoroughly reviewed and analyzed by the project consultants. Based upon written responses received, the consultant team will incorporate appropriate suggested revisions into the final classification plan.

Task 6.3 – Conduct follow-up telephone interviews as necessary – Based upon the analysis of written comments forwarded to the project consultants and where consultant staff needs further information prior to finalizing recommendations, follow-up interviews will be conducted by the project consultants with individual employees. This step will further clarify and refine any remaining problems or issues.

This task will further include any additional informal appeal processes/steps established or desired by the City.

Task 7 – Finalize the Classification Recommendations

With the completion of the employee appeal process, the consultants will finalize all classification study recommendations. Supporting the finalization of the classification plan, each employee who submitted a notice for review will receive a direct response from the project consultants. This response will specifically outline the consultant's understanding of the employee's concern, specify the steps taken to resolve the concern, and indicate to the employee the substance of the consultant's final recommendation.

Task 8 – Discuss and Document Compensation Policy

The City's compensation policy directly impacts all study end-products resulting from the compensation components of the analysis. As a starting point for this phase of the study, therefore, we propose that the consulting team meet with key management staff to clarify and confirm the City's compensation policy. Important considerations to be discussed include historical practices, recruitment and retention issues, pros and cons of the current compensation system, and reliance on external market data versus internal equity for purposes of setting salaries. The consultants will work with appropriate City representatives to determine comparison agencies and the scope of compensation data to be collected. Our proposal includes the tasks necessary to identify comparable employers and conduct a custom market survey.

Our analysis of the potential and recommended survey employers will be documented in a memorandum report after consultation with appropriate City representatives. If desired, the consultants can conduct a workshop session that identifies labor market selection parameters, options, and pros/cons of different market approaches. The draft labor market recommendations will be reviewed by appropriate City representatives so that all questions and issues are resolved. In that these decisions directly impact the parameters of the market survey, as well as the design and structure of the resulting compensation plan, our suggested approach recommends that these study tasks occur prior to the collection and analysis of the market data.

Task 9 – Collect Compensation Data

After the compensation policy discussion, the consultant team will collect and analyze the compensation data. Our proposed approach would include:

- An initial contact to each labor market employer included in the study to explain the purpose and scope of the survey and confirm cooperation.

- The collection and analysis of source documents from each survey agency including position control documents, job descriptions, salary schedules, benefit summaries, and MOUs.
- The confirmation of all compensation data through telephone calls, email, and other means. This will assure that comparability is established and that all compensation data is factual and complete.

The compensation survey elements will be discussed and confirmed with the City before the survey is initiated.

Task 10 – Compile and Format Compensation Data

The salary data, once collected and thoroughly reviewed for completeness and accuracy, will be appropriately formatted and the results tabulated in a consistent and uniform manner by the project consultants. The analysis will include pay structure trends and base salary analysis to ensure all appropriate comparison criteria is available for developing recommendations. Through the use of spreadsheet applications developed by our office, it is anticipated that standard formulas will be applied in the calculation of the survey data mean, median, and selected percentiles, with the corresponding percentage relationship to the market data also calculated. Data presentation will be customized to fit the City's objectives.

Task 11 – Audit and Finalize Compensation Data

Prior to developing specific salary recommendations, the consultants will thoroughly review and audit the collected survey data. This will include a detailed analysis of data reliability, comparability, statistical validity, and consistency. This audit will be conducted by the Project Manager independent of the consultant who collected that data. This will ensure that the most accurate and defensible survey data is utilized in comparing the City's compensation plan to the pay practices of the labor market. This analysis will also include the preparation of graphs and other presentation materials to aide in understanding the market relationships broken down by employee/bargaining group.

Task 12 – Conduct Internal Relationship Analysis

This task will include the development and application of an appropriate job evaluation methodology in order to meet with the City's policy objectives and comply with local laws, rules, and regulations. The firm has a number of job evaluation systems available and will recommend and adapt the methodology that best aligns with the City's historical practices and policy objectives.

Using the results of the job evaluation analysis, the consultants will analyze internal pay relationships. The internal pay relationship analysis will involve a number of steps in order to arrive at sound and equitable relationships for the new compensation plan. Among others, the most important of these will include:

- Analysis of existing and historical pay relationships
- Development of consistent, uniform, and realistic guidelines for determining internal relationships

- Recommendation of equitable and appropriate internal relationship differentials based on the above.

In developing consistent internal relationship guidelines, the results of the job evaluation tasks will be used to determine an equitable pay structure. Since the balance of market values versus internal values can be a policy issue, options and methodologies for achieving an appropriate balance of internal and external salary equity will be reviewed with the City before developing the salary range recommendations.

Task 13 – Develop Salary Recommendations

Based upon the results of the internal relationships analysis and the labor market survey, the project consultants will develop salary recommendations for all job classes included as a part of the study process. These salary recommendations will clearly document the means of determining the appropriate pay range and the computation of the dollar and percentage difference between the current maximum salary and the recommended maximum salary.

Before finalizing the recommendations, a careful audit of the results will be undertaken to ensure that internal salary compression or compaction does not result.

Task 14 – Develop Implementation Strategy Options and Compute Implementation Costs

Recognizing that public agencies often have limited funds available for implementation, the project consultants will develop several strategies for implementing the recommended salary structure. Such strategies will address:

- The placement of individual employees into ranges and steps
- Implementation phasing according to the needs and priorities of the City
- Integration of the study recommendations with the balance of the City's human resource management system including recruitment, selection, and performance appraisal.

The cost estimates will reflect City-wide impacts, as well as impacts on individual employees. The cost estimates will serve as a basis for the City to make necessary policy decisions to implement the compensation system in an orderly and effective manner.

Task 15 – Prepare and Review Preliminary Report

The Preliminary Report documents all classification and compensation study recommendations and the supporting information used for developing the recommendations. Specifically, the Preliminary Report will include the following:

- The City's documented compensation policy including survey agencies and survey classifications
- Results of the labor market salary survey using tables and graphs
- Documentation of selected benchmark classifications and the related job families

- Appendices containing detailed labor market data sheets, recommended salary schedules, and supporting documentation.

The project consultants will conduct an in-depth review of the Preliminary Compensation Report with the City. Any needed corrections, clarifications, or modifications will be discussed at this time.

Review of the Draft Compensation Report will also include an appeal process that meets the City's objectives. Employees, managers, and/or labor representatives will be able to submit specific issues and comments which will be researched, analyzed, and documented by the consultants. The consultants will provide the City with a written response to these issues as well as any changes in our draft recommendations.

Task 16 – Prepare and Submit Final Reports

The Final Reports will incorporate any appropriate revisions identified and submitted during the review of the preliminary reports and will serve as the administrative and procedural manuals for updating and maintaining the classification and compensation plans. The submittal of final reports will also include on-site presentations to managers, labor representatives, and the City Council. It is not uncommon for a series of draft reports to be prepared, each incrementally addressing feedback and policy direction by the City.

Structure and Work Product

Based on our review of the City’s RFP, we understand the scope of services includes an update of the classification plan, the collection and analysis of market survey data, the review and analysis of internal relationships, and recommendations for updating job descriptions. The specific scope addressed in our proposal includes the following tasks and deliverables.

Major Tasks	Deliverable
Classification analysis <ul style="list-style-type: none"> • Review of JAQs • Employee interviews • Draft classification recommendations • Drafting of job descriptions • Employee review process • Final classification recommendations 	Updated classification plan: <ul style="list-style-type: none"> • Job title and position allocations • Updated job descriptions • FLSA analysis • Documented review process
Collection and analysis of market survey data <ul style="list-style-type: none"> • Base salary, benefits, add pays, and special compensation • All job classifications 	Compensation Report with: <ul style="list-style-type: none"> • Recommended survey agencies and data sources • Graphs and tables • Base salary data sheets • Benefits data • Leave data
Internal relationship analysis <ul style="list-style-type: none"> • Identification of benchmark classes • Internal relationships analysis and documentation • Recommended salary range changes 	Table of job classifications along with: <ul style="list-style-type: none"> • Current salary range • Recommended salary range • Dollar and percentage change • Rationale for salary placement
Implementation cost analysis <ul style="list-style-type: none"> • Identify implementation options • Cost analysis based on current employee salary placements and/or budgeted positions 	List of implementation options and costs in tabular form Dynamically set up to allow for “what if” analyses

All of the above deliverables will be provided in a format that meets the City’s objectives. Our analyses and work products are conducted using Microsoft Excel, Word, and PowerPoint with some proprietary analysis conducted using Excel. We can provide source documents and PDF files as required by the City.

Work Schedule

Projects of this nature are highly sensitive. Because of this sensitivity and the anxiety experienced by many employees when going through this type of process, it is beneficial to complete the analysis in the most expedient manner feasible. Assuming full cooperation of the City and the survey agencies, our schedule assumes that all study activities can be completed within sixteen (16) weeks.

- Task 1-Conduct project initiation meetings *
- Task 2-Employees complete questionnaires
- Task 3-Conduct job analysis interviews *
- Task 4-Prepare and review preliminary classification report
- Task 5-Prepare class specifications
- Task 6-Undertake review process *
- Task 7-Finalize classification plan
- Task 8-Discuss and document compensation policy *
- Task 9-Collect compensation data
- Task 10-Compile and format data
- Task 11-Audit and finalize compensation data
- Task 12-Conduct internal relationship analysis
- Task 13-Develop salary recommendations
- Task 14-Develop implementation strategies
- Task 15-Prepare/review preliminary reports *
- Task 16-Prepare and present final reports *

	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16
Task 1-Conduct project initiation meetings *	█															
Task 2-Employees complete questionnaires		█	█	█	█	█										
Task 3-Conduct job analysis interviews *						█	█									
Task 4-Prepare and review preliminary classification report								█	█							
Task 5-Prepare class specifications								█	█	█	█					
Task 6-Undertake review process *												█	█			
Task 7-Finalize classification plan														█	█	█
Task 8-Discuss and document compensation policy *						█	█									
Task 9-Collect compensation data									█	█						
Task 10-Compile and format data										█	█					
Task 11-Audit and finalize compensation data											█	█				
Task 12-Conduct internal relationship analysis													█	█		
Task 13-Develop salary recommendations														█	█	
Task 14-Develop implementation strategies															█	█
Task 15-Prepare/review preliminary reports *																█
Task 16-Prepare and present final reports *																

* Anticipated virtual meetings; key milestones shown in blue

Fees

The total fixed cost for professional service fees and non-travel expenses to conduct the Classification and Compensation Study, as proposed, amounts to \$95,800. The cost of professional services is based upon the project as described in the work plan and is a “fixed fee” regardless of which consultant performs the task and/or the number of hours needed to complete a particular element of the study.

The proposed professional services costs are based on the following hourly rates:

- Project Manager - \$155
- Project Consultant - \$140
- Research/Support Staff - \$85

Due to continued Covid-19 restrictions, the firm has completed almost 80 classification and compensation studies using virtual meeting platforms such as Zoom and Microsoft Teams. For efficiency, our proposed cost assumes virtual meetings will be used for kick-off meetings, employee briefing sessions, employee interviews, and the review and presentation of draft and final reports. There is no limit to the number of virtual meetings.

If on-site meetings are required, the additional cost would be \$2,500 per day which includes professional fees and expenses.

Project invoicing will be done monthly based on the percentage completion of the project. If the scope of the analysis creates budget problems for the City, or if additional analysis is desired, we are willing to review the work plan and adjust it and the cost so that it is mutually satisfactory.

References

The following references represent just a small sample of similar assignments conducted by the firm. We are certain you will find that our record and our reputation are outstanding. Doug Johnson served as the project manager and Jeff McMurdo served as the primary consultant for all of the following projects.

City of Auburn, CA

Scope of Work: Classification and Compensation Study 2022-2023.

Contact: Nathan Bagwill, Director of Administrative Services
1225 Lincoln Way, Auburn, CA 95603
(530) 823-4211, Ext 110
nbagwill@auburn.ca.gov

City of Reno/City of Sacramento/Sloan Sakai Law Firm Support

Scope of Work: Classification and Compensation Studies and Expert Witness Services.* Various projects totaling over \$500,000.

Contact: Mr. Mark Gregersen
(775) 556-3000
markgregersen@gmail.com

**Mr. Gregersen can speak to a number of projects conducted by the firm including classification and compensation studies conducted for Napa County, San Luis Obispo County, and the cities of Sacramento, Vallejo, and Reno.*

Municipal Water District of Orange County

Scope of Work: Classification and Compensation Studies (2017, 2020, 2023).

Contact: Cathleen Harris, Director of Human Resources and Administration
18700 Ward Street, Fountain Valley, CA 92708
(714) 593-5007
charris@mwdoc.com

Olivenhain Municipal Water District

Scope of Work: Total Compensation Studies in 2015, 2018, 2021, and 2023.

Contact: Jennifer Joslin, Human Resources Manager
1966 Olivenhain Rd, Encinitas, CA 92024
(760) 632-4210
jjoslin@olivenhain.com

Additional references can be provided on request.

Appendix A

Five-Year Listing of Clients

Appendix A

Five Year Client Listing

Agency	Scope of Services	Contact Name Contact Title	Telephone Number E-mail Address
Cities			
City of Albany 1000 San Pablo Ave. Albany, CA 94706	Classification & Compensation Study Compensation Study Update	Melissa Rojas Human Resources Director	(510) 528-5714 MRojas@albanyca.org
City of Arcadia 240 W. Huntington Drive Arcadia, CA 91066	Classification & Compensation Study	Tracey Hause Administrative Services Director	(626) 574-5425 thause@ci.arcadia.ca.us
City of Auburn 1225 Lincoln Way Auburn, CA 95603	Classification & Compensation Study	Nathan Bagwill Director of Administrative Services	(530) 823-4211, ext. 110 nbagwill@auburn.ca.gov
City of Baldwin Park 14403 E. Pacific Avenue Baldwin Park, CA 91706	Salary Compensation Survey	Laura J. Thomas Human Resources/Risk Manager	(626) 960-4011 ext. 355 lthomas@baldwinpark.com
City of Beaumont 550 E 6 th Street Beaumont, CA 92223	Classification & Compensation Study Compensation Study Survey Update 2022	Kari Mendoza Administrative Services Director	(951) 572-3228 karim@beaumont-ca.gov
City of Big Bear Lake 39707 Big Bear Blvd. P.O. Box 10000 Big Bear Lake, CA 92315	Salary Survey – Chief Operations Officer	Erica Stephenson Administrative Services Manager	(909) 866-5831 x120 estephenson@citybigbearlake.com
City of Carlsbad 1635 Faraday Ave. Carlsbad, CA 92008	Compensation Study – Management CSEA Survey Update 2021 Range Structure Analysis CCEA Compensation/Benefits Study Benefits Update 2022	Drew Cook Human Resources Department	(760) 602-7536 drew.cook@carlsbadca.gov
City of Carson 701 E. Carson Street Carson, CA 90749	Compensation Survey	Faye Moseley Director of Human Resources and Risk Management	(310) 952-1735 fmoseley@carson.ca.us

Five Year Client Listing

Agency	Scope of Services	Contact Name Contact Title	Telephone Number E-mail Address
City of Chico 411 Main Street Chico, CA 95928	Compensation Study	Chelsea D. Phebus Director of Human Resources and Risk Management	(530) 879-7901 Chelsea.phebus@chicoca.gov
City of Coachella 1515 Sixth Street Coachella, CA 92236	Compensation Study	Sandy Krause Human Resources Manager	(760) 398-3502 ext. 132 skrause@coachella.org
Cordova Recreation & Park District 2729 Prospect Park Drive, Suite 230 Rancho Cordova, CA 95670	Classification and Compensation Study	Andrea White, SPHR Human Resource Manager	(916) 842-3315 awhite@crpd.com
City of Coronado 1825 Strand Way Coronado, CA 92118	Executive and Division Manager Compensation Analysis	Jim Krueger Administrative Services Director	(619) 522-7309 jkrueger@coronado.ca.us
City of Cupertino 10300 Tore Avenue Cupertino, CA 95014	Compensation Survey	Kristina Alfaro Director of Administrative Services	(408) 777-3220 KristinaA@cupertino.org
City of Hercules	Classification and Compensation Study	Jenny E. Smith Human Resources Specialist	(510) 799-8214 jenny.smith@ci.hercules.ca.us
City of Hermosa Beach 1315 Valley Drive Hermosa Beach, CA 90254	City Council Compensation Survey Compensation Survey 2023 Base Salary Update	Vanessa Godinez Human Resources Manager	(310) 318-0202 vgodinez@hermosabch.org
City of Hollister 327 Fifth Street Hollister, CA 95023	Total Compensation Study	Diana Hillstock Human Resources Manager	(831) 636-4301 ext. 1124 diana.hillstock@hollister.ca.gov
City of Indio 100 Civic Center Mall Indio, CA 92201	Classification and Compensation Study	Terry Derringer Director of Human Resources & Risk Management	(760) 391-4009 tderringer@indio.org
City of Irwindale 5050 North Irwindale Avenue Irwindale, CA 91706	Compensation Study	Mary Hull Human Resources Manager	(626) 430-2204 mhull@IrwindaleCA.gov
City of Ketchikan, AK 334 Front Street Ketchikan, AK 99901	Compensation Study and Technical Assistance on Related Matters Technical Assistance	Marie Miller Human Resources Manager	(907) 228-5623 mariem@city.ketchikan.ak.us
City of La Mirada 13700 La Mirada Blvd. La Mirada, CA 90638	Total Compensation Study	Cristina Cota Human Resources Manager	(562) 943-0131 ccota@cityoflamirada.org

Five Year Client Listing

Agency	Scope of Services	Contact Name Contact Title	Telephone Number E-mail Address
City of Laguna Hills 24035 El Toro Road Laguna Hills, CA 92653	Classification and Compensation Study	Melissa Au-Yeung Deputy City Manager	(949) 707-2621 mau-yeung@ci.laguna-hills.ca.us
City of Lake Forest 25550 Commercentre Drive, Suite 100 Lake Forest, CA 92630	Classification and Compensation Study City Manager Survey Technical Assistance Class Analysis Memo Classification and Compensation 2022-23	Debra Rose Director of Management Services	(949) 461-3414 drose@lakeforestca.gov
City of Menlo Park 428 J Street, Ste. 400 Sacramento, CA 95814	Police Chief Compensation Survey	Mark Gregersen Former Director of Human Resources, City of Reno Former Consultant with Sloan Sakai	(916) 300-8441 mark@mgregersen.com
City of Merced 678 West 18 th Street Merced, CA 95340	Classification Study	Deneen Proctor Director of Support Services	(209) 385-4780 proctord@cityofmerced.org
City of Mercer Island 9611 SE 36 th Street Mercer Island, WA 98040	Classification & Compensation Study	Ali Spietz Chief of Administration	(206) 275-7667 ali.spietz@mercerisland.gov
City of Modesto 1010 10 th Street Modesto, CA 95354	Classification & Compensation Study	Joseph P. Lopez Assistant City Manager	(209) 571-5809 joelopez@modestogov.com
City of Monterey 735 Pacific Street, Suite B Monterey, CA 93940	FFMA Survey Update	Allyson Hauck Human Resources Director	(831) 646-3767 hauck@monterey.org
City of Monterey 735 Pacific Street, Suite B Monterey, CA 93940	Compensation Study MPA Update (February 2020)	Jeff Sloan Partner	(415) 678-3800 jsloan@sloansakai.com
City of Monterey Park 320 West Newmark Avenue Monterey Park, CA 91754	Classification & Compensation Study	Christine Tomikawa Director of Human Resources and Risk Management	(626) 307-1345 ctomikawa@montereypark.ca.gov
City of National City 1243 National City Blvd. National City, CA 91950	Compensation Survey	Eddie Kreisberg Attorney	(650) 248-2125 eddie@kreisberg-law.com
City of Oakland 1220 7 th Street Berkeley, CA 94710	Fire Arbitration	Jeff Sloan Partner	(415) 678-3800 jsloan@sloansakai.com

Five Year Client Listing

Agency	Scope of Services	Contact Name Contact Title	Telephone Number E-mail Address
City of Palm Springs 3200 E. Tahquitz Canyon Way Palm Springs, CA 92262	Total Compensation Survey Total Compensation Survey (Police) Compensation Survey – Airport Operations Supervisor	Perry Madison Director of Human Resources	(760) 323-8215 Perry.Madison@palmspringsca.gov
City of Palo Alto 250 Hamilton Avenue Palo Alto, CA 94303	Compensation Survey – POA / IAFF / FCA Compensation Survey – UMPAPA Market Study – SEIU – Inspector Field Services Management and Professional Group Market Study	Rumi Portillo Chief People Officer	(650) 329-2376 rumi.portillo@cityofpaloalto.org
City of Paramount 16400 Colorado Avenue Paramount, CA 90723	Compensation Study Minimum Wage Compression Study 2022 Compensation Study Update Community Services Superior Survey Water Department Survey	Jonathan Masannat Human Resources Manager	(562) 220-2022 jmasannat@paramountcity.com
City of Petaluma 11 English Street Petaluma, CA 94952	Classification and Compensation Study – Full-time Miscellaneous Non-Sworn Positions POA Non-Sworn Survey Update	Amy Reeve Director of Human Resources	(707) 778-4343 areeve@ci.petaluma.ca.us
City of Piedmont 120 Vista Avenue Piedmont, CA 94611	Community Service Officer Classification / Compensation Survey	Stacy A. Jennings Human Resources Administrator	(510) 420-3047 sjennings@piedmont.ca.gov
City of Port Hueneme 250 N. Ventura Road Port Hueneme, CA 93041	Classification & Compensation Study 2021	Melanie Hanisco Human Resources Manager	(805) 986-6501 mhanisco@ci.port-hueneme.ca.us
City of Rancho Cordova 2729 Prospect Park Drive Rancho Cordova, CA 95670	Classification & Compensation Study	Brenda L. Roach Human Resources Manager	(916) 851-8741 broach@cityofranhocordova.org
City of Red Bluff 555 Washington St. Red Bluff, CA 96080	Compensation Study	Scott Garrison Human Resources Administrator	(530) 527-2605 ext. 3051 sgarrison@cityofredbluff.org
City of Redondo Beach 415 Diamond Street Redondo Beach, CA 90277	Targeted Classification & Compensation Study	Diane Strickfaden Director of Human Resources	(310) 318-0659 ext. 2832 Diane.strickfaden@redondo.org

Five Year Client Listing

Agency	Scope of Services	Contact Name Contact Title	Telephone Number E-mail Address
City of Reno, NV P.O. Box 1900 Reno, NV 89505	Labor Market Analysis Police and Fire Compensation Study	Mark Gregersen Former Director of Human Resources	(916) 300-8441 mark@mgregersen.com
City of Reno, NV 1 E. First Street, 11 th Fl Reno, NV 89501	Total Compensation Survey	Jesse Puett Management Analyst	(775) 348-6901 puettj@reno.gov
City of Sacramento, CA 428 J Street, Ste. 400 Sacramento, CA 95814	Compensation Services Police Officers Association Arbitration EMT/Paramedic 2022 Fire Survey 2021 Fire Survey 2022 POA Survey 2021 Mayor and City Council Survey 2022 Survey – Deputy Attorney	Mark Gregersen Former Director of Human Resources, City of Reno Former Consultant with Sloan Sakai	(916) 300-8441 mark@mgregersen.com
City of Sacramento 915 I Street Sacramento, CA 95814	Salary Surveys 2017-18 Fire and Locksmith Survey Salary Surveys (4 positions) Fire Survey Update 2018 6 Class Survey May 2019 Sacramento Fire Local 2019 Treasury Study – Salary Survey 2 Positions POA Survey 2019 LOC 39 – 5 Classes Survey POA Local Market Survey July 2019 Fire Retiree Health Survey 2019 Fire Arbitration Compensation Survey – Procurement Services Manager Salary Survey – Fire 2020 POA 2020 Survey Update POA 2021 Survey Mayor and City Council Survey 2022 Police Shift Differential	Shelley Banks-Robinson Labor Relations Manager	(916) 808-5541 SMBanks-Robinson@cityofsacramento.org

Five Year Client Listing

Agency	Scope of Services	Contact Name Contact Title	Telephone Number E-mail Address
<p>City of St. Helena 1480 Main Street St. Helena, CA 94574</p>	<p>Classification & Compensation and Organization Review of the Public Works Department Technical Assistance – Human Resources Technician Compensation Study Update Base Salary Survey</p>	<p>Kathy Robinson, SPHR Human Resources & Information Technology Director</p>	<p>(707) 968-2741 krobinson@cityofsthelelena.org</p>
<p>City of Santa Barbara 735 Anacapa Street Santa Barbara, CA 93101</p>	<p>Supervisor’s Association Salary Survey</p>	<p>Sam Ramirez Administrative Analyst III, Labor Relations</p>	<p>(805) 564-5304 scramirez@santabarbaraca.gov</p>
<p>City of Santa Clara 1500 Warburton Avenue Santa Clara, CA 95050</p>	<p>Compensation Study Fire Survey Update 2019 Survey Update (3 classes)</p>	<p>Julia Hill Assistant Director of Human Resources</p>	<p>(408) 615-2161 JHill@santaclaraca.gov</p>
<p>City of Santa Rosa 350 Sansome Street, Suite 300 San Francisco, CA 94104</p>	<p>Fire Arbitration</p>	<p>Jonathan Holtzman Partner</p>	<p>(415) 848-7235 jholtzman@publiclawgroup.com</p>
<p>City of Santee 10601 Magnolia Avenue Santee, CA 92071</p>	<p>Classification Study</p>	<p>Erica Hardy Director of Human Resources</p>	<p>(619) 258-4100 ext. 132 EHarding@CityofSanteeCa.gov</p>
<p>City of Shoreline 17500 Midvale Ave. N Shoreline, WA 98133</p>	<p>Compensation Study</p>	<p>Melissa Muir Human Resources Director</p>	<p>(206) 801-2241 mmuir@shorelinewa.gov</p>
<p>City of Signal Hill 2175 Cherry Avenue Signal Hill, CA 90755</p>	<p>Compensation Study Comprehensive Compensation Study of City-wide Job Classes</p>	<p>Sylvia Soong Human Resources Manager</p>	<p>(562) 989-7307 ssoong@cityofsignalhill.org</p>
<p>City of Simi Valley 2929 Tapo Canyon Road Simi Valley, CA 93063</p>	<p>Job Analysis (Waterworks Meter Reader and Water system Supervisor) Classification Study – Emergency Services Manager Technical Assistance – Classification and Compensation Survey (4 Positions) and Purchasing Agent Technical Assistance Purchasing Agent Survey and Job Description 4 Class Survey Assistant Public Works Director Survey</p>	<p>Elizabeth Foushee Deputy Director/Human Resource</p>	<p>(805) 583-6741 EFoushee@simivalley.org</p>

Five Year Client Listing

Agency	Scope of Services	Contact Name Contact Title	Telephone Number E-mail Address
City of Snoqualmie, WA 38624 SE River Street Snoqualmie, WA 98065	Classification and Compensation Study of all Management and Professional Positions	Debra Vigil Director of Administrative Services	(425) 888-8004 dvigil@ci.snoqualmie.wa.us
City of South Lake Tahoe 1901 Airport Road, S Lake Tahoe, CA 96150	Classification & Compensation Study On-going Technical Assistance	Ember E. Buckman Human Resources Manager	(530) 542-6050 ebuckman@cityofslt.us
City of South Pasadena 1414 Mission Street South Pasadena, CA 91030	Technical Assistance on Classification and Compensation Matters	Tara Schultz Interim Human Resources Director	(626) 403-7312 tschultz@southpasadenaca.gov
City of Stockton 22 E. Weber Ave., Suite 150 Stockton, CA 95202	Department Head Survey Update 2017 Technical Assistance	Teresia Zadroga-Haase Human Resources Director	209-937-8344 Teresia.Haase@stocktongov.com
City of Suisun City 701 Civic Center Blvd. Suisun City, CA 94585	Compensation Study	Joe Dingman Administrative Services Director	(707) 421-7300 jdingman@suisun.com
City of Sunnyvale P.O. Box 3707 Sunnyvale, CA 94088	Technical Assistance (Master Contract) Survey Update – COA (Dispatchers) Fire Protection Classification and Compensation Study PSOA Annual Survey IT Structure and Survey 2022 COA Survey 2023 PSOA Survey 2023	Tammy Parkhurst Human Resources Manager	(408) 730-7498 tparkhurst@ci.sunnyvale.ca.us
City of Tracy 333 Civic Center Plaza Tracy, CA 95376	Total Compensation Study	Midori Lichtwardt Director of Human Resources	(209) 831.6159 midori.lichtwardt@ci.tracy.ca.us
City of Tulare 411 E. Kern Avenue Tulare, CA 93274	Total Compensation Survey Sworn Fire Total Compensation Survey	Irene M. Santos Management Analyst	(559) 684-4204 isantos@tulare.ca.gov
City of Union City 34009 Alvarado Niles Rd. Union City, CA 94587	Total Compensation Survey	Lilybell Nakamura Director of Human Resources	(510) 675-5381 lilybell@Unioncity.org
City of Watsonville 1220 7 th Street Berkeley, CA 94710	Fire Arbitration	Jeff Sloan Partner	(415) 678-3800 jsloan@sloansakai.com

Agency	Scope of Services	Contact Name Contact Title	Telephone Number E-mail Address
Counties			
Mono County P.O. Box 696 Bridgeport, CA 93517	Salary and Compensation Analysis	Dave Butters Human Resources Director	(760) 932-5413 dbutters@mono.ca.go
Napa County 1195 Third Street Napa, CA 94559	SEIU Limited Compensation and Internal Alignment Management Survey Update – 2018 PSE Compensation Survey 2019 SEIU Compensation Survey Update 2020 PSE Survey Update October 2021 Management Conf. Benchmark Survey 2021 Union Survey (2022) Fire Compensation Cost Study Management Compensation Study	Christine M. Briceno Director of Human Resources	(707) 259-8341 Christine.briceno@countyofnapa.org
Sacramento County 700 H Street, Room 7650 Sacramento, CA 95814	Unrepresented Management Compensation Survey Compensation Survey – Board of Supervisor Class Total Compensation Study – Unrepresented Job Classifications	Karen Farrel Senior Personnel Analyst	(916) 874-7974 farrelk@saccounty.gov
San Benito County 481 4 th Street Hollister, CA 95023	Classification & Compensation Study	Edgar Nolasco Deputy County Administrative Officer	(831) 636-4000 ext. 16 Enolasco@cosb.us
San Joaquin County 24 South Hunter Street Stockton, CA 95202	Multiple classification and compensation studies of various employee groups conducted since 1998	Marilyn Maskell Principal Human Resources Analyst	(209) 468-3276 mmaskell@sjgov.org
San Joaquin County 428 J Street, Ste. 400 Sacramento, CA 95814	SEIU Factfinding 2019	Jeff Sloan Partner	(415) 678-3800 jsloan@sloansakai.com
San Luis Obispo County 1220 7 th Street Berkeley, CA 94710	Factfinding SLOCEA – Technical Assistance Factfinding SDSA – Technical Assistance Compensation Study	Jeff Sloan Partner	(415) 678-3800 jsloan@sloansakai.com

Five Year Client Listing

Agency	Scope of Services	Contact Name Contact Title	Telephone Number E-mail Address
Santa Barbara County 1226 Anacapa Street Santa Barbara, CA 93101	Executive Salary Study (SBCERS)	Stefan Brewer Workforce Planning Manager	(805) 56802806 sbrewer@countyofsb.org
Solano County 675 Texas Street Fairfield, CA 94533	Compensation & Benefits Studies	Marc A. Fox Director of Human Resources	(707) 784-2552 MAFox@SolanoCounty.com
Sonoma County 575 Administration Drive #116B Santa Rosa, CA 95403	Total Compensation Survey – Phase I (18 Job Classes) Total Compensation Survey – Phase II (141 Job Classes) Total compensation Survey – Phase III (9 Water Agency Job Classes) Human Resources Classification Study EFS Manager 2018 Compensation Survey Update Classification Study Community Development Commission	Lisa Conner Human Resources Analyst III	(707) 565-5119 Lisa.conner@sonoma-county.org
Higher Education			
Mendocino College 1000 Hensley Creek Road Ukiah, CA 95482	Technical Assistance on Classification and Compensation Matters	Nicole Marin, SHRM-CP Director of Human Resources	(707) 468-3056 nmarin@mendocino.edu
Southwestern Community College District 900 Otay Lakes Rd. Chula Vista, CA 91910	Ad-Hoc Technical Assistance	Rose C. DelGaudio Executive Assistant Superintendent/Vice President for Human Resources	(619) 482-6328 rdelgaudio@swccd.edu
Water Districts			
Alameda County Water District 43885 S. Grimmer Blvd. Fremont, CA 94538	Classification and Compensation Study	Jennifer Solito, M.A., SPHR Human Resources & Risk Manager	(510) 668-4220 Jennifer.solito@acwd.com
East Bay Regional Park District P.O. Box 5381 Oakland, CA 94605- 0381	Classification and Compensation for Management, Confidential, POA, and Seasonal Employees Technical Assistance	Dr. Ana M. Alvarez Deputy General Manager	(510) 544-2011 AAlvarez@ebparks.org

Five Year Client Listing

Agency	Scope of Services	Contact Name Contact Title	Telephone Number E-mail Address
East Bay Regional Park District 2225 E Bayshore Road, Suite 200 Palo Alto, CA 94303	AFSCME Survey Update 2021 Survey Update 2021 Management, Confidentials, Police Association	Eddie Kreisberg Attorney	(650) 248-2125 eddie@kreisberg-law.com
Irvine Ranch Water District 15600 Sand Canyon Avenue Irvine, CA 92618	2014/2015 Compensation Survey Compensation Study 2018 Compensation Survey 2021	Gretchen C. Ronin Human Resources Manager	(949) 453-5438 Maswadeh@irwd.com
Mesa Water District 1965 Placentia Avenue Contra Costa, CA 92627	Technical Assistance on Classification and Compensation Matters	Coleen L. Monteleone Administrative Services Manager	(949) 631-1205 coleenm@mesawater.org
Municipal Water District of Orange County 18700 Ward Street Fountain Valley, CA 92728	Classification and Compensation Study	Cathleen Harris Director of Human Resources and Administration	(714) 593-5007 charris@mwdoc.com
Nevada Irrigation District 1036 West Main Street Grass Valley, CA 95945	Salary Survey	Jana Kolakowski Human Resources Manager	(530) 271-6825 kolakowskij@nidwater.com
Olivenhain Municipal Water District 1966 Olivenhain Road Encinitas, CA 92024	Compensation Survey Salary Survey	Thomas Wood Human Resources Manager	(760) 632-4211 twood@olivenhain.com
Otay Water District 2554 Sweetwater Springs Spring Valley, CA 91978	Compensation and Benefits Study Technical Assistance Compensation Study	Kelli Williamson Human Resources Manager	(619) 670-2227 kwilliamson@otaywater.gov
Sacramento Suburban Water District 3701 Marconi Avenue, Suite 100 Sacramento, CA 95821	2018 Compensation Study	Dan Bills Finance Director	(916) 679-3970 dbills@sswd.org
South Coast Water District 31592 West Street Laguna Beach, CA 92651	Classification, Compensation, and Benefits Study Additional Classification and Compensation Study 2021	Robin Wiessner, CPBA, HCS HR & Risk Manager	(949) 499-4555 ext. 3118 RWiessner@scwd.org
South Placer Municipal Utility District 5807 Springview Drive Rocklin, CA 95677	Classification and Compensation Study	Emilie Costan, CRM Administrative Services Manager	(916) 786-8555 ecostan@spmud.ca.gov

Five Year Client Listing

Agency	Scope of Services	Contact Name Contact Title	Telephone Number E-mail Address
Sweetwater Authority 505 Garrett Avenue Chula Vista, CA 91910	Salary and Benefits Survey	Jennifer Sabine Assistant General Manager	(619) 409-6702 jsabine@sweetwater.org
Trabuco Canyon Water District 32003 Dove Canyon Drive Trabuco Canyon, CA 92679	Classification and Compensation Matters Survey Update	Fernando Paludi General Manager	(949) 709-5721 fpaludi@tcwd.ca.gov
Turlock Irrigation District 333 East Canal Drive Turlock, CA 95381	Compensation Study	Jorian Reed Director of Human Resources	(209) 883-8252 jhreed@tid.org
Vallecitos Water District 201 Vallecitos de Oro San Marcos, CA 92069	Classification and Compensation Study 2022 Compensation Study	Rhondi Emmanuel Administrative Services Manager	(760) 744-0460 ext. 240 remmanuel@vwd.org
Valley of the Moon Water District P.O. Box 280 El Verano, CA 95433	Compensation Study	Matthew Fullner General Manager	(707) 996-1037 x10 mfullner@vomwd.org
West Basin Municipal Water District 17140 S. Avalon Blvd., Suite 210 Carson, CA 90746	Classification and Compensation Study	Michelle Green Human Resources Officer	(310) 660-6228 michelleg@westbasin.org
Other Districts and Authorities			
Housing Authority of the City of Alameda 701 Atlantic Avenue Alameda, CA 94501	Total Compensation Study Compensation Study – Exempt Positions Compensation Study of Non-Exempt Positions Management Compensation Review (Amended Scope) Compensation Study – Executive Director Compensation Study for AHA Director Positions	Vanessa M. Cooper Executive Director	(510) 747-4320 vcooper@alamedahsg.org
Alameda County Housing Authority 22941 Atherton Street Hayward, CA 94541	Management Compensation Study	Thomas Makin Deputy Director for Operations	(510) 727-8516 TomM@haca.net
Aptos-La Selva Fire Protection District 428 J Street, Ste. 400 Sacramento, CA 95814	Business Manager Survey	Charles Sakai Managing Partner	(415) 299-0856 csakai@publiclawgroup.com

Five Year Client Listing

Agency	Scope of Services	Contact Name Contact Title	Telephone Number E-mail Address
Association of Regional Center Agencies (ARCA) 980 9 th Street, Ste. 1450 Sacramento, CA 95814	Compensation Analysis – Executive Director	Kathy Hebert ARCA Board of Directors President	(916) 446-7961 Mom2gjc@gmail.com
Black Gold Cooperative Library System 580 Camino Mercado Arroyo Grande, CA 93420	Classification Study and Total Compensation Survey	Glynis Fitzgerald Director of Operations	(805) 543-6082 gfitzgerald@blackgold.org
Conejo Recreation and Park District 403 West Hillcrest Drive Thousand Oaks, CA 91360	Technical Assistance – Class & Compensation Matters	Phyllis Bluhm Human Resources Supervisor	(805) 381-1221 pbluhm@crpd.org
Contra Costa County Schools Insurance Group 550 Ellinwood Way Pleasant Hill, CA 94523	Compensation Study	Erica Williamson Human Resources Manager	(866) 922-2744 ewilliamson@cccsig.org
Costa Mesa Sanitary District 290 Paularino Avenue Costa Mesa, CA 92626	Classification and Compensation Study	Dyana Bojarski Management Analyst II	(949) 645-8400 ext. 226 DBojarski@cmsdca.gov
El Dorado County Transit Authority 6565 Commerce Way Diamond Springs, CA 95619	Compensation & Benefits Study	Maria Harris Human Resources Manager	(530) 642-5383 ext. 2909 mharris@eldoradotransit.com
Hayward Area Recreation and Park District 1099 E Street Hayward, CA 94541	Classification & Compensation Study General Manager Survey Update	Natalie Wong Human Resources Manager	510-455-1124 wonn@haywardrec.org
Menlo Park Fire Protection District 170 Middlefield Road Menlo Park, CA 94025	AFSCME Compensation Survey Classification & Compensation Study	Brenna Rowe Human Resources Manager	(650) 688-8400 browe@menlofire.org
Montecito Sanitary District 1042 Monte Cristo Lane Santa Barbara, CA 93108	Salary Study	Stephen Williams District Administrator	(805) 969-4200 swilliams@montsa.org
North Bay Schools Insurance Group 380A Chadbourne Road Fairfield, CA 94534	Compensation Study	Jan DeGracia Executive Director	(707) 428-1830 ext. 105 jand@nbsia.org

Five Year Client Listing

Agency	Scope of Services	Contact Name Contact Title	Telephone Number E-mail Address
Oakland School of the Arts 1220 7 th Street Berkeley, CA 94710	Compensation Study and Research	Jeff Sloan Partner	(415) 678-3800 jsloan@sloansakai.com
Orange County Fire Authority 1 Fire Authority Road Irvine, CA 92602	Classification and Compensation As Needed	Debbie Casper, C.P.M., CPPB Purchasing & Materials Manager	(714) 573-6641 debbiecasper@ocfa.org
Redwood Empire Schools' Insurance Group 5760 Skylane Blvd., Suite 100 Windsor, CA 95492	Compensation Survey	Ronda Bergesen Business Manager	(707) 836-0779 x105 rbergesen@resig.org
Sacramento County Employees' Retirement System 980 9 th Street, Suite 750 Sacramento, CA 98512	CEO Compensation Analysis CEO Performance Evaluation System Management Compensation Survey Update 2017 Compensation Study	Kathy Ragalia Chief Operations Officer	(916) 874-9119 regaliak@saccounty.net
Sacramento County Regional Sanitation District & Sacramento Area Sewer District 10060 Goethe Road Sacramento, CA 95827	Classification Compensation Survey	Candice Mabra Human Resources Manager 2	(916) 875-2418 mabrac@sacsewer.com
San Diego County Water Authority 4677 Overland Avenue San Diego, CA 92123	Classification and Compensation Study Survey Update – 14 Positions	Ashley Kite Senior Human Resources Analyst	(858) 522-6667 akite@sdcwa.org
Santa Barbara County Air Pollution Control District 260 North San Antonio Road, Suite A Santa Barbara, CA 93110	Compensation Study	Kristina Aguilar, CPA Administrative Manager	(805) 961-8800 AguilarK@sbcapcd.org
Santa Clara County Central Fire Protection District 14700 Winchester Blvd. Los Gatos, CA 95032	Total Compensation Survey – Firefighter / Engineer Compensation Survey Services for the Fire Prevention Division Fire Survey Update 2018 Total Compensation Study Salary Survey Wage Compensation Study for EMS Coordinator Position	Rebecca Lo Management Analyst	(408) 341-4457 Rebecca.lo@sccfd.org

Five Year Client Listing

Agency	Scope of Services	Contact Name Contact Title	Telephone Number E-mail Address
Schools Insurance Authority P.O. Box 276710 Sacramento, CA 95827	Compensation Study	Todd Cheli Human Resources Manager	(916) 364-1281 tcheli@sia-jpa.org
South Tahoe Public Utility District 1275 Meadow Crest Dr. South Lake Tahoe, CA 96150	Compensation Study One (1) Class Survey Director of Operations Survey	Liz Kauffman Human Resources Director	(530) 543-6222 lkauffman@stpud.us
State Bar of California 180 Howard St. San Francisco, CA 94105	Salary Survey and Related Services	Steve Mazer Chief Administrative Officer	(415) 538-2326 steve.mazer@calbar.ca.gov
Sweetwater Authority 505 Garrett Avenue Chula Vista, CA 91910	2023 Compensation Study	Carlos Quintero General Manager	(619) 420-1413 equintero@sweetwater.org
Tahoe Truckee Unified School District 11603 Donner Pass Road Truckee, CA 96161	Management Classification and Compensation Study	Thomas Gemma Executive Director of Administrative Services	(530) 582-2500 tgemma@ttusd.org
Teton County Fire Protection District 911 North Highway 33 PO Box 474 Driggs, ID 83422	Compensation Study and Analysis	Bret Campbell Fire Chief	(208) 715-5201 bcampbell@tetoncountyfire.com
Ventura County Employees' Retirement Association 1190 South Victoria Avenue, Suite 200 Ventura, CA 93003	Market-based Compensation Analysis	Chris Ayala Program Assistant	(805) 339-4261 Chris.Ayala@ventura.org
Whatcom Transportation Authority 2011 Young Street Bellingham, WA 98225	Compensation Study	Kimberly Somers	(360) 738-4588 kimberlys@ridewta.com

Appendix B

Sample Job Analysis Questionnaire

III - IMPORTANT AND ESSENTIAL DUTIES

Listing the most important duties first, describe the major duties performed by the position. A duty is an activity performed to achieve the purpose or objectives of the job. A duty is a significant part of a functional area and consists of the performance of one or more tasks. Start each duty statement with a verb such as prepare, maintain, calculate, collect, compile, clean, repair, or other similar action word.

Respond based on actual job duties and responsibilities. Describe the job responsibilities/duties as they exist now. In other words, tell us what you are actually doing in the job – this may or may not differ from what your current job description states. NOTE: This is NOT an evaluation of your personal background or performance in the job.

Be objective and accurate. Try not to understate or inflate the job. Base your responses on the typical duties and responsibilities of the job under normal conditions, not under unusual circumstances or temporary assignments.

Frequency Code: D (Daily), W (Weekly), M (Monthly), Q (Quarterly), S (Semi-Annually), Y (Yearly)

% of Total Job: Assuming all duties listed encompass 100% of the total job, give a best estimate of the approximate percentage of total job that each duty (or group of related duties) represents. The total of all duty statements must equal 100%.

IMPORTANT AND ESSENTIAL DUTIES		Frequency Code	Percent of Total Job
1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			
9.			
10.			

IMPORTANT AND ESSENTIAL DUTIES

		Frequency Code	Percent of Total Job
11.			
12.			
13.			
14.			
15.			
16.			
17.			
18.			
19.			
20.			

IV - DUTIES ADDED TO YOUR JOB IN THE LAST YEAR

Identify each duty (by number) in Section III that has been added to your job in the last year and provide a brief explanation as to why this duty was added to your job.

Duty #	Brief Explanation

V - JOB RELATED QUALIFICATIONS

JOB RELATED QUALIFICATIONS: Please list the knowledge, skills and abilities that are:

1. **Necessary** for the successful performance.
2. **Cannot be learned** in a brief training or orientation session (1 week or less).
3. **Required by the job**, not ones you have acquired on the job.

DEFINITIONS

KNOWLEDGE is a body of information that applies directly to the performance of a function or duty (e.g., Knowledge of accounting principles and practices.)

SKILL is a developed ability to use knowledge effectively or dexterity/coordination in the performance of physical tasks (e.g., Operate word processing equipment).

ABILITY is the competence or capability to perform an observable duty and usually results in an observable product (e.g., Prepare clear and concise reports).

Please list the knowledge, skills and abilities that are **essential** for the position being described. The knowledge, skills and abilities listed under this section should be linked with the essential duty statements.

ESSENTIAL KNOWLEDGE, SKILLS, AND ABILITIES STATEMENTS		Duties from Section III (Please identify the duties from Section III by Number)
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		
9.		
10.		
11.		

ESSENTIAL KNOWLEDGE, SKILLS, AND ABILITIES STATEMENTS

**Duties from
Section III
(Please identify the
duties from Section
III by Number)**

12.		
13.		
14.		
15.		
16.		
17.		
18.		
19.		
20.		
21.		
22.		

VI - COMPUTER SKILLS

What computer skills are required to perform your job? ***Remember this is not necessarily the level of skills you possess, but the level required in the normal performance of your job.*** Check as many boxes that apply.

- Work requires typical office computing software including the use of e-mail, spreadsheet, word processing, presentation, and internet applications.
- Work involves developing, maintaining, and enhancing applications. Applications may include special purpose software systems, databases, interactive-spreadsheets, data entry forms, report writers, and web-based systems.
- Work requires the maintenance, installation, and administration of operating systems including desktop computers, servers, and other hardware. Duties typically also include troubleshooting and installing computer hardware components and software applications.
- Work involves the installation, maintenance, and administration of network servers, server-based applications, network/communication hardware, and special purpose servers such as e-mail, security, internet/intranet, and related systems. Work involves both local and wide-area networks (if applicable).

VII - EDUCATION & EXPERIENCE

A. **Education** -- What minimum level of education is needed to satisfactorily perform your job?
(Not necessarily your background.)

- | | |
|--|--|
| <input type="checkbox"/> Read and write; no specific requirements
<input type="checkbox"/> Supplemental training - vocational or college level course
<input type="checkbox"/> Bachelor's or higher degree | <input type="checkbox"/> High school diploma or equivalent (G.E.D.)
<input type="checkbox"/> Formal specialized training - 2 year college program; apprenticeship/technician
Field of Study: _____ |
|--|--|

Please list any licenses, registrations, or certificates **required** for your position and the agency responsible for issuing it.

License, Certificate, Registration	Issuing Agency

B. **Experience** -- In addition to education and training, what is the minimum required experience? _____ years.

VIII - EQUIPMENT OPERATING REQUIREMENTS

List **equipment or machines** you use in the regular course of your assigned duties that require training and skill to operate proficiently. For each item, please assign a frequency code (D, W, M, Q, S, Y) and estimate the total amount of time spent operating that piece of machinery/equipment.

MACHINE/EQUIPMENT	REQUIRED DOCUMENTATION	
	Relative Frequency	Percent of Time
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		
9.		
10.		
11.		

IX - SUPERVISION EXERCISED

- A. Do you exercise supervision over any employees? Yes No
- B. If yes, please check the definition that best describes the type of supervision you exercise and the names and classification/job titles of the employees whom you supervise. **Please attach additional pages if necessary.**

- Technical and Functional (Lead Worker)** - You are responsible for prescribing procedures, methods, materials and formats used in recurring projects of particular area(s) of work including training other employees. In addition, you are also responsible for recurring work projects or activities involving other employees to whom you give direction and guidance including lead supervision for a project or set of work activities. You may also have responsibility for assigning, scheduling, coordinating, organizing, and directing work activities.

Regular Lead Project Lead

Employee Name	Class/Job Title

- Direct Supervision** - In addition to functional and technical supervision, you are responsible for the administration of line personnel functions including employee selection, discipline, grievances, and formal performance evaluations.

Employee Name	Class/Job Title

- C. If you checked either of the above, please indicate the nature of group supervised and the number supervised.

Full-time	Part-time	Seasonal/Temp	Volunteer

- D. Please clarify your responsibility for the following supervisory responsibilities and decisions. Check the appropriate description that relates to each applicable function you perform in your position.

Function	RESPONSIBILITY			
	Responsible for Function	Make Formal Recommendations	Provide Input	N/A
Hiring	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Termination	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Promotion	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Performance Appraisal	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Employee Discipline	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Employee Counseling	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Setting Goals and Objectives	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Revising Procedures	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Changing Policy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Training	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

X - CONTACTS

A. With what individuals **inside** your organization do you have regular and frequent job related contact other than your supervisor and those you supervise? Check the type of contact, indicate the purpose(s) of the contact (a, b, c, d, e, f, g) using the codes noted below, and the relative frequency (D, W, M, Q, S, Y). You may indicate more than one "purpose of contact" as appropriate.

<u>Purpose of Contact</u>	<u>Code</u>	<u>Purpose of Contact</u>	<u>Code</u>
Provide information	a	Negotiate solutions within policy guidelines	e
Collect information	b	Negotiate solutions involving policy changes	f
Coordinate projects, activities, etc.	c	Other - specify below	g
Solve problems	d		

Type of Internal Contact	Purpose of Contact	Relative Frequency
<input type="checkbox"/> Clerical/maintenance staff, other departments		
<input type="checkbox"/> Professional/technical staff, same department		
<input type="checkbox"/> Professional/technical staff, other departments		
<input type="checkbox"/> Managers, other departments		
<input type="checkbox"/> Council(s) (Type: _____)		
<input type="checkbox"/> Board(s) (Type: _____)		
<input type="checkbox"/> Commission(s) (Type: _____)		
<input type="checkbox"/> Committee(s) (Type: _____)		
<input type="checkbox"/> (Specify)		
<input type="checkbox"/> (Specify)		

B. With what individuals **outside** your organization do you have regular and frequent contact required by the major responsibilities of your job? Check the type of contact, indicate the purpose(s) of the contact (a, b, c, d, e, f, g) using the codes noted above, and the relative frequency (D, W, M, Q, S, Y). You may indicate more than one "purpose of contact" as appropriate.

Type of External Contact	Purpose of Contact	Relative Frequency
<input type="checkbox"/> General Public		
<input type="checkbox"/> Contractors, engineers and/or developers		
<input type="checkbox"/> Vendors		
<input type="checkbox"/> Public Agencies		
<input type="checkbox"/> Consultants		
<input type="checkbox"/> Committee(s) (Type: _____)		
<input type="checkbox"/> (Specify)		
<input type="checkbox"/> (Specify)		

XI - ENVIRONMENTAL FACTORS

Please identify the **environmental factors** that you are exposed to in the course of your job and indicate the relative frequency code (see below) for each of the applicable conditions. Also, indicate from Section III the number(s) of the Duties (i.e., #3, #6) that are related to these working conditions. Please leave line blank if environmental factor is not applicable.

Frequency Codes:	I = Infrequent (less than 10%)	M = Moderate, Average (25% - 50%)
	S = Seldom, Minimal (10% - 25%)	A = Almost Always (more than 50%)

Condition	Relative Frequency				Duties
	I	S	M	A	
Outside environment; travel from site to site					
Inside environment					
Heat					
Cold					
Dampness or Chilling					
Dry atmosphere condition					
Working in confined spaces					
Working closely					
Work alone					
Irregular work hours					
Working with machinery					
Working with or in water					
Working below ground					
Work on ladders/scaffolds					
Vibration					
Noise					
Slippery/uneven surfaces					
Moving objects/vehicles					
Grease and Oils					
Radiant energy					
Electrical energy					
Explosives					
Silica, asbestos, etc.					
Dust (specify):					
Toxic Chemicals (list):					
Fumes, smoke, gases (list):					
Solvents (list):					
Exposure to poisonous animals/insects					
Stress, emergency (specify):					
Other factors not listed:					

Check the box that best describes your overall environmental working conditions:

- General** – Standard office/indoor setting.
- Variable** – Moderate exposure to conditions that may be unpleasant such as inclement weather, machine noise, or strong odors; occasional exposure to risks controlled by safety precautions.
- Hazardous** - Infrequent or moderate exposure to risks or discomforts that are partially controlled by special safety precautions, e.g., working around machines with moving parts, with contagious diseases or irritant chemicals.
- Significant Risk** - Continuous high risks with exposure to potentially dangerous situations requiring a range of safety or other precautions, e.g., working at great heights, under extreme conditions, subject to possible physical attack, working around high voltage.

XII - PHYSICAL FACTORS

Please identify each appropriate **physical activity** required in the performance of your job and indicate the relative frequency code (see below) for each activity. Also indicate from Section III the number(s) of the Duties (i.e., #3, #6) that are related to these physical factors. Please leave line blank if physical activity is not applicable.

Frequency Codes:	I = Infrequent (less than 10%)	M = Moderate, Average (25% - 50%)
	S = Seldom, Minimal (10% - 25%)	A = Almost Always (more than 50%)

Condition	Relative Frequency				Duties
	I	S	M	A	
Heavy lifting, 45 lbs. & over					
Moderate lifting, 15-45 lbs.					
Light lifting, under 15 lbs.					
Heavy carrying, 45 lbs. & over					
Moderate carrying, 15-45 lbs.					
Light carrying, under 15 lbs.					
Pulling					
Pushing					
Reaching					
Use of fingers					
Both hands required					
Walking					
Standing					
Sitting					
Crawling					
Kneeling					
Repeated bending					
Climbing					
Operating of motorized equipment					
Ability to discharge firearms					
Speech					
Visual requirements					
★ Near vision, i.e., 20 inches or less					
★ Mid-range, i.e., more than 20 inches and less than 20 feet.					
★ Distance, i.e., 20 feet or more					
★ Color, i.e., ability to identify and distinguish colors					
★ Depth Perception					
Repetitive motions					
Hearing requirements					
Special factors not listed:					

Check the box that best describes the overall amount of physical effort typically required by your job:

- Standard** - Normally seated, standing or walking at will; normal physical ability to do some bending and light carrying.
- Restricted/Mobile** - Confined to immediate work area; can only leave work station during assigned breaks.
- Exertive** - Extensive walking, recurring bending, crouching, stooping, stretching, reaching or similar activities; recurring lifting of light or moderately heavy items.
- Strenuous** - Considerable and rapid physical exertion or demands on the body such as frequent climbing of tall ladders, continuous lifting of heavy objects, crouching or crawling in restricted areas; exertion requires highly intense muscular action leading to substantial muscular exhaustion.

(This page is available as a separate online template)

IMMEDIATE SUPERVISOR REVIEW

Did the employee describe the duties and responsibilities of the position **accurately and fully**? Are there duties missing? Are there any duties listed that are not requirements of this position? Please comment. ***Do not make comments regarding employee performance.***

Signature: _____ **Date:** _____

Type or Print Name: _____

Classification Title: _____

MANAGEMENT REVIEW

Do the preceding descriptions and comments by the employee and immediate supervisor(s) describe the position **accurately and fully**? Please comment.

Signature: _____ **Date:** _____

Type or Print Name: _____

Classification Title: _____