



Paradise Recreation & Park District

Agenda Prepared: 1/30/2024
Agenda Posted: 2/2/2024
Prior to: 5:00 PM

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NOTICE OF BOARD OF DIRECTORS COMMITTEE MEETING

Committee: Finance Committee (*McGreehan/Rodowick*)
Date: Thursday, February 8, 2024
Time: 3:00 PM
Location: Via Teleconference and Terry Ashe Recreation Center, Room A

Notice:

The public may listen to this meeting via computer or telephone. The public may submit comments prior to the meeting via email to bodclerk@prpd.com before 1:00 p.m. on the day of the meeting and they will be read into the record. Please use the link to join the webinar: Join Zoom Meeting <https://us02web.zoom.us/j/89394583808?pwd=MVBFUlhqTTE1LzFFRUJpTzZ2S1Vsdz09>

Or via Telephone: Dial by your location: +1 669 900 9128 US (San Jose) (or) +1 346 248 7799 US (Houston)
Meeting ID: 893 9458 3808 Password: 6626

AGENDA:

The Committee will meet to:

1. Discuss PRPD Investment Policy
2. Discuss CPS HR Consulting Class/Comp Study Proposal

https://paradisepprd.sharepoint.com/sites/BODMeeting/Shared Documents/_Committee.Finance/2024/FC_24.0208.Agenda.docx

Staff Report

February 8, 2024



DATE: 1/30/2024
TO: Finance Committee Board
FROM: Dan Efseaff, District Manager
SUBJECT: Reaffirm District Investment Policy

Report in Brief

At the February 12, 2020, Board of Directors (BOD) meeting, the Board approved Resolution #20-02-2-475 to adopt the Paradise Recreation and Park District Investment Policy. The policy provides for the product investment of District funds to maximize the efficiency of the District cash management and reporting requirements. Our CSDA Finance Consultant recently informed us that it is a good practice to annually review and reaffirm the policy. Staff seeks Committee input before the item is brought before the full Board.

Recommendation: Review and recommend reaffirmation to the full Board.

Attachments:

- A. Resolution #20-02-2-475
- B. Exhibit A- Investment Policy

https://paradisepprd.sharepoint.com/sites/BODMeeting/Shared Documents/_Committee.Finance/2024/FC_24.0208/BOD_Investment.Policy.Report_24.0130.docx
2/2/2024



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Resolution #20-02-2-475

RESOLUTION OF THE PARADISE RECREATION AND PARK DISTRICT BOARD OF DIRECTORS APPROVE AND ADOPT FINANCIAL INVESTMENT POLICY

WHEREAS, the Board of Directors of the Paradise Recreation and Park District (herein “Board”) is a local non-enterprise special district formed and authorized to provide services within its jurisdiction, pursuant to State of California Public Resources Code, Division 5, Chapter 4, Article 1, commencing with Section 5780; and,

WHEREAS, the District has adopted California Government Code Section 53607 and 53646 et seq to define the District’s reporting responsibilities.

WHEREAS, on June 12, 2019, the Board of Directors approved the development of a Financial Investment Policy to provide guidelines for the prudent investment of District funds and to maximize the efficiency of the District’s cash management and reporting requirements.

NOW, THEREFORE BE IT RESOLVED, the Paradise Recreation and Park District Board of Directors approves and adopts the Financial Investment Policy (Exhibit A) to provide guidelines for the prudent investment of District funds and to maximize the efficiency of the District’s cash management and reporting requirements.

PASSED AND ADOPTED by the Board of Directors of the Paradise Recreation and Park District on the 12th day of February 2020, by the following vote:

AYES:

NOES:

ABSTAIN:

ABSENT:

Al McGreehan, Chairperson

Julie Van Roekel, Secretary

Paradise Recreation and Park District Financial Investment Policy

Policy

It is the policy of the Paradise Recreation and Park District (“District”) to provide guidelines for the prudent investment of District funds and to maximize the efficiency of the District’s cash management. The ultimate goal is to enhance the economic status of the District consistent with the prudent protection of the District’s investments. This investment policy has been prepared in conformance with all pertinent existing laws of the State of California including California Government Code Sections 53600, *et seq.*

Scope

This policy covers all funds and investment activities of the District except for (1) the proceeds of bond issues, which are invested in accordance with provisions of their specific bond indentures, and (2) funds invested in retirement or deferred compensation plans. All funds covered by this policy are defined and accounted for in the District’s audited annual Basic Financial Statements Report. Further, any new funds created shall be covered by this policy unless specifically excluded by District management and the Board of Directors.

Prudent Investor Standard

The District operates its investment portfolio under the Prudent Investor Standard (California Government Code Section 53600.3) which states, that “when investing, reinvesting, purchasing, acquiring, exchanging, selling, or managing public funds, a trustee shall act with care, skill, prudence, and diligence under the circumstances then prevailing, including, but not limited to, the general economic conditions and the anticipated needs of the District, that a prudent person in a like capacity and familiar with those matters would use in the conduct of funds of a like character and with like aims, to safeguard the principle and maintain the liquidity needs of the District.” This standard shall be applied in the context of managing the overall portfolio. Investment officers, acting in accordance with written procedures and this investment policy and exercising the above standard of diligence shall be relieved of personal responsibility for an individual security’s credit risk or market price changes, provided deviations from expectations are reported in a timely fashion and appropriate action is taken to control adverse developments.

Investment Objectives

- A. When investing, reinvesting, purchasing, acquiring, exchanging, selling or managing the District’s funds,

1. The primary objective is to safeguard the principle of the funds.
2. The secondary objective is to meet the liquidity needs of the District.
3. The third objective is to achieve a reasonable market rate of return on invested funds.

It is the policy of the District to invest public funds in a manner to obtain the highest yield obtainable with the maximum security while meeting the daily cash flow demands of the District as long as investments meet the criteria established by this policy for safety and liquidity and conform to all laws governing the investment of District funds.

B. Safety of Principle

Safety of principle is the foremost objective of the District. Each investment transaction shall seek to first ensure that capital losses are avoided, whether they arise from securities defaults, institution default, broker-dealer default, or erosion of market value of securities. The District shall mitigate the risk to the principle of invested funds by limiting credit and interest rate risks. Credit Risk is the risk of loss due to the failure of a security's issuer or backer. Interest Rate Risk is the risk that the market value of the District's portfolio will fall due to an increase in general interest rates.

1. Credit risk will be mitigated by:
 - a. Limiting investments to only the most creditworthy types of securities;
 - b. Prequalifying the financial institutions with which the District will do business, using a questionnaire or other screening tool, and
 - c. Diversifying the investment portfolio so that the potential failure of any one issue or issuer will not place undue burden on the District.
2. Interest rate risk will be mitigated by:
 - a. Structuring the District's portfolio so that securities mature to meet the District's cash requirements for ongoing obligations, thereby reducing the possible need to sell securities on the open market at a loss prior to their maturity to meet those requirements; and
 - b. Investing a portion of the portfolio in shorter-term securities.

C. Liquidity

Availability of sufficient cash to pay for current expenditures shall be maintained in money market funds, local government investment pools that offer daily liquidity, repurchase agreements, or short-term securities that can easily be converted into cash because they have secondary markets. The accounting management system of the District shall be designed to accurately monitor and forecast expenditures and revenues to ensure the

investment of monies to the fullest extent possible.

D. Rates of Return

Yield on investments shall be considered only after the basic requirements of safety and liquidity have been met. The investment portfolio shall be designed to attain a market average rate of return throughout economic cycles, taking into account the District's risk constraints, the composition and cash flow characteristics of the portfolio, and applicable laws.

Delegation of Authority

A. Responsibilities of the Accounting Department

As delegated on an annual basis by the Board of Directors, and in accordance with California Code Section 53607, the Accounting Department is charged with the responsibility for maintaining custody of all public funds and securities belonging to or under the control of the District, and for the deposit and investment of those funds in accordance with principles of sound treasury management and with applicable laws and ordinances.

B. Responsibilities of the District Accountant

The District Accountant shall perform the monthly review and reconciliation of accounting investments as well as be responsible for the conduct of all Accounting Department functions.

C. Responsibilities of the District Manager

The District Manager is responsible for directing and supervising the assigned designee and is responsible further to keep the Board of Directors fully advised as to the financial condition of the District.

D. Responsibilities of the District's Auditing Firm

The District's auditing firm's responsibilities shall include but not be limited to the examination and analysis of fiscal procedures and the examination, checking and verification of accounts and expenditures. A review of the District's investment program is a part of the responsibility described above.

E. Responsibilities of the Board of Directors

The Board of Directors shall annually review and approve the written Investment Policy. As provided in the Policy, the Directors shall receive, review, and accept quarterly investment reports, as identified in California Code Section 53646 et seq, and monthly investment reports as identified in California Code Section 53607, which may be included in the Consent Calendar of the regularly scheduled meeting of the Board of Directors.

F. Responsibilities of the Finance Committee

There shall be a Finance Committee consisting of two (2) members of the Board of Directors.

No members of the Finance Committee shall profit in any way from activities of the Committee. The District Manager and assigned designee(s) shall serve as staff liaison to the Committee. The Committee shall meet as needed to discuss the investment reports, investment strategy, investment and banking procedures, as well as the anticipated cash flow projection and any other significant investment-related activities being undertaken. The Committee's meetings will be summarized in minutes, which are distributed to the Board of Directors. In the event that a Finance Committee meeting is not held, the Accounting Department will prepare an investment report and send it to the full Board of Directors on a monthly basis.

Ethics and Conflicts of Interest

Officers and employees involved in the investment process shall refrain from personal business activity that could conflict with proper execution of the investment program or which could impair their ability to make impartial investment decisions. Employees and investment officers shall disclose any material financial interest in financial institutions that conduct business with this District, and they shall further disclose any large personal financial / investment positions that could be related to the performance of the District's portfolio.

Diversification and Risk

The District recognizes that investment risks can result from issuer defaults, market price changes, or various technical complications leading to temporary illiquidity. To minimize the District's exposure to these types of risk, the portfolio should be diversified among several types of institutions, instruments, and maturities. The District Manager with the Finance Committee shall minimize default risk by prudently selecting only instruments and institutions, which at the time of placement have been evaluated for their financial viability and compliance with this policy. No individual investment transaction shall be undertaken that jeopardizes the total capital position of the overall portfolio.

Performance Standards

The investment portfolio will be managed in accordance with the standards established within this Investment Policy and should obtain a market rate of return throughout budgetary and economic cycles, taking into account the District's investment risk constraints, cash flow needs, and maturities of the investments.

Reporting

The District has adopted California Government Code 53607 and 53646 et seq to define the District's reporting responsibilities.

BOD Approved and Adopted: February 12, 2020

Staff Report

February 8, 2024



DATE: 2/8/2024
 TO: Finance Committee Board
 FROM: Dan Efseaff, District Manager
 SUBJECT: CPS HR Consulting Proposal- Class/ Comp. Study

Summary

As part of the FY 2023-24 employee negotiations response, the Board of Directors (BOD) directed staff to develop a competitive salary and classification study. Staff reached out to CPS HR Consulting to complete this effort. Staff requests Finance Committee review and feedback before the proposal goes to the full Board.

Recommendation: Review proposal and provide recommendation to Staff.

1. Fiscal Impact

The study has not to exceed limit of \$73,205.00.

Attachments:

- A. CPS HR Consulting Proposal

https://paradisepprd.sharepoint.com/sites/BODMeeting/Shared Documents/_Committee.Finance/2024/FC_24.0208/BOD.Class.Comp.StudyReport_24.0130.docx
 2/2/2024

PROPOSAL

Paradise Recreation & Park District

Classification and Compensation Consulting Services

Originally submitted: December 13, 2023

Updated: January 29, 2024

SUBMITTED BY:

VICKI QUINTERO BRASHEAR

Director of Products and Services

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Sacramento, CA 95834
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Your Path to Performance

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January 29, 2024

Dan Efseaff
District Manager
Paradise Recreation & Park District
6626 Skyway
Paradise, CA 95969

Sent via e-mail to: defseaff@paradisepspd.com

Dear Mr. Efseaff:

CPS HR Consulting (CPS HR) is pleased to submit this updated proposal to Paradise Recreation & Park District (District) to provide classification and compensation consulting services. We are excited to deliver this as your potential partner in achieving organizational excellence. With our comprehensive range of HR services, we combine our unmatched government sector knowledge with a shared perspective to drive impactful results.

We are committed to delivering services that are nothing short of exceptional, and we are eager to discuss how we can tailor our solutions to best serve you. In business since 1985, we pride ourselves in establishing and nurturing long-term relationships with the agencies we serve as we live out our mission of bringing excellence in Human Resources to the public sector.

We look forward to the possibility of working with the District on this important project. Should you have any questions, please do not hesitate to contact me at **(916) 471-3481** or via e-mail at **vbrashear@cpshr.us**.

Sincerely,



Vicki Quintero Brashear
Director of Products and Services

Experience and Qualifications

ORGANIZATION IDENTIFICATION INFORMATION	
Legal Name and DBA	Cooperative Personnel Services dba CPS HR Consulting
Headquarters	Physical: 2450 Del Paso Road, Suite 220, Sacramento, CA 95834 Mailing: 2450 Del Paso Road, Suite 160, Sacramento, CA 95834
Main Phone	(800) 822-4277
Regional Offices	20211 Guadalupe Street, Suite 260, Austin, TX 78705 9233 Park Meadows Dr #139, Lone Tree, CO 80124 1968 S. Coast Hwy # 961, Laguna Beach, CA 92651
Year Established	1985
# of FTEs	108
Type of Organization	Joint Powers Authority
Website	www.cpshr.us

About CPS HR Consulting

CPS HR is a client-centric human resources and management consulting firm specializing in addressing the unique challenges and complexities encountered by government and non-profit organizations. With a history dating back to 1985, **we have consistently served as a trusted advisor to our clients**, understanding their specific needs as self-supporting public agencies.

Our mission is to advance excellence in human resources within the public sector, and our vision is to empower individuals to fulfill the ideals of public service. CPS HR's core competency lies in our in-depth knowledge and expertise in the public sector landscape. Being a public agency ourselves, we possess a deep understanding of the intricacies and issues faced by our client base.

For nearly four decades, CPS HR has been delivering classification and compensation services to a wide spectrum of clients, ranging from state, federal, and local governments to special districts and non-profit organizations. Our extensive experience includes numerous projects with agencies of similar size and scope. Furthermore, the project portfolio we provide offer additional insights into the nature of our work in classification and compensation. Through these examples, we demonstrate our proficiency in data collection, thorough data analysis, strategic recommendations, and our ability to work effectively with our valued partners and clients.

Core Services

CPS HR believes in an integrated, systems-based approach to talent management and provides consulting in all the key areas listed below.

CPS HR CONSULTING CORE SERVICES



Comprehensive HR solutions for advanced organizational performance.



CLASSIFICATION & COMPENSATION

- Classification
- Compensation



DIVERSITY, EQUITY & INCLUSION (DEI)

- DEI Strategic Planning
- DEI Training



HR CONSULTING

- Audit & Compliance
- HR Outsourcing
- HR Membership
- Complaint Investigations



LICENSING & CERTIFICATION

- Accreditation
- Candidate Management
- Program Management
- Testing Services



ORGANIZATIONAL STRATEGY

- Organizational Assessment
- Change Management
- Employee Engagement
- Performance Management
- Succession Planning
- Workforce Planning



RECRUITMENT & SELECTION

- Executive Search
- Mid-Management and Specialized Recruitment
- General Recruitment
- Employer Branding



TESTING

- Assessment Center
- Job Analysis
- Test Rental
- Test Administration
- Selection Tools Development



TRAINING & DEVELOPMENT

- Executive Coaching
- Training Center
- Open Enrollment Training
- On-Site Training

CORE MARKETS



Federal



State



Local



Special Districts



Education



Non-Profit Organizations

Joint Powers Authority

Cooperative Personnel Services, doing business as CPS HR Consulting, is a national firm and is a governmental Joint Powers Authority (JPA) of the State of California. A JPA is a public agency created pursuant to the Joint Exercise of Powers Act (Government Code 6500 et seq). This Act allows two or more government agencies to establish a new public entity authorized to exercise those powers jointly held. A JPA is an instrumentality of a state or a political subdivision of a state and is not a registered corporation of any state. Cooperative Personnel Services was established under a “Joint Powers Agreement” by the State Personnel Board of the State of California, the counties of Sacramento and Sonoma, the Hayward Unified School District, the City of Anaheim, and the East Bay Municipal Utility District, and its purpose is to provide the opportunity for the joint powers “to discuss, study and solve common or similar problems with respect to modern human resource and related management processes.”

Our Chief Executive Officer (CEO) reports to a Board of Directors representing diverse public sector agencies across the nation. The Board members are listed below.



CPS HR BOARD OF DIRECTORS

1. Linda Andal, HR Director, City of Anaheim (CA)
2. Vincent Zamora, HR Director, City of Las Vegas (NV)
3. Fernando Yañez, Exec Director of Classified HR, Hayward Unified School District (CA)
4. Peggy Rowe, Director of HR, Pinellas County (FL)
5. Keisha Young, Dep Director of HR, County of Mecklenburg (NC)
6. LaShon Ross, HR Director/Risk Management, City of Plano (TX)
7. Joseph Hsieh, Personnel Services Manager, County of Sacramento (CA)

Distinguishing Characteristics

Extensive Public Sector Expertise: We have a profound depth of experience working exclusively with public agencies and non-profit organizations. CPS HR is a joint powers authority, and as such, our charter mandates that **we provide services exclusively to public agencies and non-profits**. Over the years, we have conducted numerous classification and compensation studies for a wide array of public agencies.

Highly Qualified Staff: Our dedicated team members bring a wealth of knowledge, having worked in both public and private sectors in classification and compensation. They are known for their meticulous approach to tasks, active listening to our clients' needs, and hold advanced education and certifications.

Cutting-Edge Technology: At CPS HR, we utilize the power of our proprietary web-based tool, the Comp Calculator, for efficient management and analysis of compensation survey data. This innovative platform allows for agency-specific data entry and generates individual datasheets in Excel for each surveyed classification. Moreover, we facilitate secure and seamless collaboration through shared documents with our clients via Microsoft Teams™.

Tailored Services: CPS HR is committed to delivering top-quality classification and compensation services tailored to the unique objectives of each client's study.

Open and Transparent Communication: Throughout the project, the CPS HR Project Team is dedicated to maintaining open channels of communication with our client's staff. This commitment ensures that the project remains on track, adheres to the established timeline, and remains within budget constraints.

Similar Work

Examples of Completed Projects List

We have conducted hundreds of classification and compensation studies for cities, counties, special districts, and higher education. Due to the significant number of projects, we provided a partial list of agencies for which we have provided classification and compensation services below.

Classification and Compensation Partial Five-Year Listing	
Albert Einstein Academies (CA)	Fort Collins – Loveland Water District & South Fort Collins Sanitation District (CO)
California Department of Food and Agriculture	Fresno Unified School District (CA)
California Department of Industrial Relations	Imperial Irrigation District (CA)
California High-Speed Rail Authority	Inland Empire Utilities Agency (CA)
California Infrastructure and Economic Development Bank	Jefferson Union High School District (CA)
California Office of the State Public Defender	Long Beach Water Department (CA)
California Public Utilities Commission	Mariposa County Unified School District/Mariposa County Office of Education (CA)
California State Controller's Office	McKinleyville Community Services District (CA)
California State Lands Commission	Mendocino County (CA)
CalOptima	Montgomery County (MD)
Chaffey College (CA)	Morgan County (CO)
City of Carlsbad (CA)	North County Transit District (CA)
City of Carpinteria (CA)	Northern California Power Agency (CA)
City of Chicago (IL)	Ojai Valley Sanitary District (CA)
City of Glendora (CA)	Orange County Fire Authority (CA)
City of Long Beach (CA)	Otero County (CO)
City of Menlo Park (CA)	Paradise Irrigation District (CA)
City of Newport Beach (CA)	Paratransit (CA)
City of Palm Desert (CA)	Port of Long Beach (CA)
City of Plano (TX)	Prince George's County (MD)
City of Rancho Cucamonga (CA)	Redlands Unified School District (CA)
City of San Luis (AZ)	Reef-Sunset Unified School District (CA)
City of San Mateo (CA)	San Diego Association of Governments (CA)
City of Santa Cruz (CA)	Santa Clarita Valley Water District (CA)
City of Santa Monica (CA)	Schools Excess Liability Fund (CA)
City of Sheridan (CO)	Seattle City Light Department (WA)
City of Temecula (CA)	Sequoia Union High School District (CA)
Colorado River Fire Rescue	Southwestern Power Administration (GA)
County of Calaveras (CA)	Superior Court of California - Tulare County (CA)

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County of Montgomery (MD)	Superior Court of California, County of Sacramento
County of Park (CO)	Town of Eaton (CO)
County of Sonoma (CA)	Tulare County (CA)
Covered California	Vail Recreation District (CO)
Cucamonga Valley Water District (CA)	Ventura County Transportation Commission (CA)
Eagle River Water & Sanitation District (CO)	WAPA (CSO) US DOE/Western Area Power (CO)
El Dorado County Office of Education (CA)	West Valley Water District (CA)
Folsom Cordova Unified School District (CA)	Williams S. Hart Union High School District (CA)

Project Team

We have a uniquely qualified team of professionals who will focus on maintaining open communication with the client's designated staff to ensure this project preserves its scope, the client's objectives are met, and all deliverables adhere to the confirmed timeline and budget. The Project Team will be selected upon project award.

Classification and Compensation Division

Staff List

Manager & Technical Leads:	Ellen Fishel Manager Located in Ohio	Igor Shegolev Technical Specialist Located in Arizona	David Prieto Principal Consultant Located in California	Michelle Garbato Principal Consultant Located in California
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Consulting Team:	Sarah Jansen Senior Consultant Located in California	Suzanne Ansari Senior Consultant Located in California	Ashley Jacobs Senior Consultant Located in California	Jasmine Daniels Senior Consultant Located in Florida
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Operations Team:	Sheila McAuliff Principal Prog. Coord. Located in California	Denise Moran Program Coordinator Located in S. Carolina	Chase Sivret Assoc. HR Consultant Located in California	Manpreet Kaur Admin. Technician Located in California
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Staff/Role	Experience/Education
Ellen Fishel, Division Manager <i>Location: Ohio</i>	<p>Human Resources professional with over 12 years of progressive experience in public sector HR at the state and local levels. Ms. Fishel has substantial experience partnering with business units to design, deliver, and implement policy driven, innovative solutions to daily HR issues as well as large scale strategic initiatives.</p> <ul style="list-style-type: none"> • Masters of Labor and Human Resources, Ohio State University • B.S., Business Administration, Ohio State University <p>Certifications: Professional in Human Resources (PHR), Certified Labor Relations Professional (CLRP)</p>

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Classification and Compensation Consulting Services

Staff/Role	Experience/Education
Michelle Garbato, Principal Consultant <i>Location: California</i>	<p>Michelle brings over 13 years of progressive experience in public sector human resources at the state and local levels. She has extensive experience partnering with clients and creating and implementing innovative solutions to attract and retain highly qualified employees.</p> <ul style="list-style-type: none"> • M.A., Industrial/Organizational Psychology, California State University, Sacramento, CA • B.S., Psychology, Rochester Institute of Technology, Rochester, NY <p>Certifications: Sr. Professional of Human Resources (SPHR), Certified Professional (IPMA-CP), CALPELRA Labor Relations Master (CLRM), and various HR-related certifications from the California Department of Human Resources and State Personnel Board (Selection Analyst, Recruitment & Selection, Class & Compensation, and Workforce and Succession Planning)</p>
Igor Shegolev, Technical Specialist <i>Location: Arizona</i>	<p>Compensation and HR practitioner with over 25 years of experience in managing HR activities and teaching graduate business courses.</p> <ul style="list-style-type: none"> • M.S., Business Science of HR Management, Troy University, Troy, AL <p>Certifications/Memberships: Senior Professional of Human Resources (SPHR). Member of: SHRM, WorldatWork (U.S. Total Rewards Association)</p>
Ashley Jacobs, Senior Consultant <i>Location: Texas</i>	<p>Over 8 years of progressive experience in public sector human resources, as well as 5 years of HR management experience in the private sector.</p> <ul style="list-style-type: none"> • M.B.A., Healthcare Administration, University of Texas at Arlington, Arlington, TX • B.S., Health Ecology, University of Nevada, Reno, NV <p>Membership(s): Society for Human Resource Management (SHRM)</p>
Sarah Jansen, Senior HR Consultant <i>Location: California</i>	<p>Over 12 years of public sector human resources experience, including significant classification and compensation experience. Also served on the Classification and Compensation Committee at a previous employer.</p> <ul style="list-style-type: none"> • B.A., Business Administration, Magna Cum Laude, Humboldt State University, Arcata, CA
Jasmine Daniels, Senior HR Consultant <i>Location: Florida</i>	<p>Ms. Daniels brings over 8 years of progressive experience in public sector human resources at the county level as well as the private sector. She has valuable experience in various human resource functions including high-volume recruitment, labor and employee relations, classification and compensation, performance management, and risk management. She has performed in various public safety capacities and completed extensive classification and compensation projects within these agencies.</p> <ul style="list-style-type: none"> • B.S., Psychology, Bethune-Cookman University, Daytona Beach, FL.
Suzanne Ansari, Senior HR Consultant	<p>Senior-level human resources professional with over 15 years of experience in public, private, and non-profit sectors. Ms. Ansari is highly skilled in</p>

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Classification and Compensation Consulting Services*

Staff/Role	Experience/Education
<i>Location: California</i>	<p>classification, compensation, job analysis, and organizational studies. She has prepared over 1,000+ job descriptions for multiple agencies, served as a guest speaker on classification & compensation topics at various conferences and has published several articles for local Orange County based newspapers.</p> <ul style="list-style-type: none"> • B.S., Speech Communication, Cum Laude, minor in Education, University of Alaska, Fairbanks, AK <p>Certifications/Memberships: Merit Academy graduate-California Personnel School Commission (CSPCA), Orange County Sheriff Department Citizen’s Police Academy graduate. Member of: Society for Human Resource Management (SHRM), Western Region Intergovernmental Personnel Assessment Council (WRIPAC), and California Public Employers Labor Relations Association (CALPELRA)</p>
Sheila McAuliff, Principal Program Coordinator <i>Location: California</i>	<p>Ms. McAuliff has more than 20 years of HR experience with focus in the areas of recruitment and selection, licensure and certification, and classification and compensation. She has been the project manager for a variety of employment testing and certification programs at the state and local levels. She currently manages the operations team in the classification and compensation division with a focus on quality control, technology solutions, and data management.</p> <ul style="list-style-type: none"> • B.S., Business – Human Resources Management
Denise Moran, Program Coordinator <i>Location: South Carolina</i>	<p>Ms. Moran has over 25 years of administrative experience, 14 of which have been in the Human Resources environment including the administration of benefits for CPS HR.</p> <ul style="list-style-type: none"> • Distinction, COBOL Computer Programming and Design, Bolton St. College, Ireland • Grade A, Employee Benefits, UC Davis Extension
Chase Sivret, Associate HR Consultant <i>Location: California</i>	<p>Over five years of experience with data analytics, data collection, and quality control, with two years of experience in the human resources environment.</p> <ul style="list-style-type: none"> • B.S. Business Administration Finance, University of Arizona

Methodology

Understanding of the Scope of Work

We understand the District is seeking classification and compensation consulting services within the following parameters:

■ Classification Study for District

- Up to **17** classifications and up to **46** incumbents
- One (**1**) orientation (total) for incumbents/supervisors
- Online position description questionnaire with online, 1-level supervisor review process
- Incumbent/supervisor job evaluation interviews of selected study participants
- Provide bulleted list of suggested updates to the **17** existing classification specifications¹
 - The bulleted list of suggested updates is the total deliverable (a report and presentations are not part of the scope of the study)

■ Total Compensation Study for District

- Base salary² + benefits collection, analysis, and comparison
- Up to **17** benchmark classifications
- Labor market pool of up to **8** agencies (CPS HR will conduct research and provide recommendations to the District)
- Internal equity analysis at the classification level
- Delivery of data sheets showing market results, job matches, and benefits information
- Provide salary recommendations and update the compensation structure itself
 - The data sheets are the total deliverable (a report and presentations are not part of the scope of the study)

To follow is our methodology to accomplish these parameters.

¹ An update to the classification structure, updating the classification specifications, and creating employee allocations will be the responsibility of the District.

² CPS HR collects the minimum and maximum of the salary range; not actual, individual salaries.

Classification Study Work Plan

Task 1 – Receive and Review Background Materials. Upon contract execution, CPS HR will gather background information including the following materials:

- Organizational Charts and Employee Roster
- Memorandums of Understanding, as applicable
- Classification Specifications, preferably in MS Word
- Past Classification and Compensation Studies
- Relevant Policies and Procedures
- Agency’s Mission, Vision, and Values statements

Client Responsibilities and/or Pricing Assumptions Associated with Task:

- The client will upload electronic copies of all requested documents to a shared online site provided by CPS HR.
- The employee roster provided by the client will establish a mutually agreed effective date.
 - Any revisions or discrepancies in the roster will be promptly addressed through close collaboration between CPS HR and the client. Maintaining the accuracy of the roster is of utmost importance as it directly affects the completion of Position Description Questionnaires (PDQs) and the supervisor review process, both critical components of the study. Please note that any modifications initiated by the client to the roster during the study, or any inaccuracies identified in the roster after provision to CPS HR, will necessitate the initiation of a scope change amendment and adjustments to the contract funding to accommodate these changes.

Task 2 – Initial Project Meeting. During the kick-off meeting for the classification study, CPS HR’s Project Manager will convene with the District’s internal project staff and designated key stakeholders. The primary objectives of this meeting are to:

- **Confirm Study Goals and Objectives:** Establish a clear understanding of the study’s overarching goals and specific objectives, ensuring alignment between CPS HR and the client’s expectations.
- **Define Project Tasks:** Outline the comprehensive list of tasks to be performed throughout the study, clarifying roles and responsibilities for all parties involved.
- **Discuss Methodologies:** Delve into the chosen methodologies and tailored approaches for the classification study, promoting transparency and consensus on project deliverables.
- **Develop a Communication Plan:** Collaboratively design a communication plan tailored to the needs of the project. This plan will address communication frequency, channels, and key contacts, emphasizing the importance of open and consistent communication as a cornerstone of project acceptance and success.

This structured meeting will provide a solid foundation for the classification study, ensuring that all stakeholders are on the same page regarding project objectives, methodologies, and communication protocols.

Client Responsibilities and/or Pricing Assumptions Associated with Task:

- After the kick-off meeting, CPS HR will provide a project parameters memo for the client’s review and approval, ensuring mutual alignment before progressing with the project.

- CPS HR will furnish an estimated timeline, including key milestones, shortly following the approval of the project parameters document.

Task 3 – Develop Job Evaluation Tool. CPS HR will use a survey tool to ensure valid information is gathered, analyzed, and documented consistently from incumbents regarding their current classifications. This activity includes finalizing a Position Description Questionnaire (PDQ) for approval by the District and distribution of the PDQ to study participants.

The PDQ is designed to capture specific information, and to be used in studies with multiple analytical goals such as position allocation and classification specification development/revisions.

Client Responsibilities and/or Pricing Assumptions Associated with Task:

- For purposes of creating a cost-effective response, our pricing assumes the District will use CPS HR's PDQ with minor (3-4) edits. Additional hours spent on the task will be contracted separately.
- The PDQ will be provided in English in online survey format. All surveys will be completed online³.

Task 4 – Conduct Orientation Session. The client will invite relevant stakeholders to attend an online orientation session. For purposes of this scope of work, we have planned for **one (1) virtual, one-hour orientation session** to be conducted, which can be recorded by CPS HR for viewing by individuals who are not able to attend the scheduled session.

The purpose of the orientation session is to (i) **communicate** study goals, methodology, and processes; (ii) **demonstrate** the PDQ and explain to employees how the document should be completed; (iii) **explain** the role of employees, supervisors, and managers in the study; and (iv) **respond** to employee questions regarding the study process.

These tasks and processes are critical in gaining employee understanding, trust, and acceptance of the study. Where possible, we encourage executives, managers, supervisors, employee bargaining unit representatives, and human resources staff to attend the meeting to familiarize themselves with employee questions and the responses to those questions.

Task 5 – PDQ Completion. All study employees will have the opportunity to provide information on the duties and responsibilities as it relates to job specifications, duties not covered in the job specification, minimum qualifications, and other aspects of the classification. Each incumbent's supervisor (*during a 1-level review process*) will then review the collected data to ensure that the incumbent has accurately and sufficiently captured all pertinent information on job context and work output.

Client Responsibilities and/or Pricing Assumptions Associated with Task:

- All PDQs will be completed online, including the supervisor/manager review process.
- A unique link to the PDQ will be sent to incumbents via e-mail by CPS HR.

³ We are open to discussing alternatives to online completion should the client desire to accommodate any personnel who do not have web/computer access during the conduct of their job duties. Depending on the alternative chosen, an amendment to the contract for additional funding may be necessary.

- **Responsiveness of study participants is absolutely critical to maintaining the agreed timeline.** An amended timeline will be provided by the CPS HR Project Manager if the online PDQ completion date is pushed out.
- The supervisor review process includes one (1) level of supervisory review.

Task 6 – Receive and Review PDQs/Prepare for Job Evaluation Interviews. The CPS HR Project Team will thoroughly review each completed PDQ⁴ to obtain an understanding of the duties and responsibilities assigned to the position. Job evaluation interview questions for selected study employees will be developed based upon the results of the documentation review. CPS HR Project Team members will develop an interview schedule for selected incumbents and will coordinate the schedule with the Agency’s designated staff member.

Client Responsibilities and/or Pricing Assumptions Associated with Task:

For purposes of creating a cost-effective response, our pricing assumes that:

- up to **90%** of incumbents will provide completed PDQs. Therefore, project staff will review up to **41** returned PDQs⁵
- project staff will create interview questions for up to **70%** of those respondents (or **29** incumbents)
- up to **5** supervisor interviews will be conducted
 - Should the client request review of more PDQs or request extra interviews, these services can be included at an added cost.
- CPS HR will develop an interview schedule in coordination with the client and will send a meeting invitation to incumbents, and then later to supervisors, via e-mail. Staff will have one (**1**) opportunity to request a re-schedule if needed. At the agreed-upon deadline, staff may not change the final selected time slot.

Task 7 – Conduct Job Evaluation Interviews, follow up Supervisor Interviews. In addition to completing PDQs, *selected* incumbents will be interviewed to ensure CPS HR gains a comprehensive understanding of the position's duties and responsibilities. The determination of which incumbents will be interviewed will be made during the PDQ review process by CPS HR.

Additionally, interviews with supervisors or managers may also be held to further clarify information documented on their subordinate employees’ PDQs. For planning purposes, each interview session may take up to sixty (60) minutes via web conference. **For purposes of this costing, reschedules for missed interviews have not been estimated.**

⁴ For single position classifications lacking a completed PDQ, CPS HR will provide an opportunity for the appropriate supervisor to provide commentary on that position’s duties and scope.

⁵ If more than the expected percentage of incumbents provide responses to the PDQ, the client shall identify the appropriate incumbents to be included in the review process at the cap indicated above.

Client Responsibilities and/or Pricing Assumptions Associated with Task:

- CPS HR reserves the right to identify the interviewees.
- Interviews will take place over sequential business days and will take place between the hours of 8:30 am and 5:00 pm Local Time via web conference.
- If requested, we can develop a contract amendment to accommodate a reschedule process for missed interviews or to add additional interviewees.

Task 8 – Analyze Classification Data. The Project Team will analyze all information collected from the incumbents and their supervisor, and any job evaluation interviews to identify the job level, scope, typical duties, requisite knowledge, skills, abilities, and other job-related characteristics of each position. This analysis will be used to develop recommendations regarding classification specification updates.

Task 9 – Prepare and Discuss General Findings. The Project Team will facilitate a meeting to discuss the methodology, findings, and preliminary recommendations.

Client Responsibilities and/or Pricing Assumptions Associated with Task:

- Costs assume one meeting, for up to 1.5 hours, with the client’s project team to discuss.
- A bulleted list (3-5 items) of suggested updates to the 17 existing classification specifications is the total deliverable (a formal report and presentations are not part of the scope of the study)
 - Updating the classification structure, updating the classification specifications, and creating employee allocations will be the responsibility of the District.
 - A review of the physical requirements/environment of each classification is not part of the scope of the study.
 - A review of FLSA determination of each classification is not part of the scope of this study.

Compensation Study Work Plan

Task 1 – Review of the District’s Background Materials. Upon contract execution, CPS HR will request background information from the client to ensure our Project Manager and the CPS HR Project Team are prepared for initial meetings. The CPS HR Project Manager will coordinate activities through and report to the client’s Internal Project Manager and other designated key stakeholders.

Task 2 – Initial Project Meeting. The primary objective of this task is to conduct an initial meeting between the CPS HR Project Manager and the District’s Internal Project Manager along with other designated stakeholders. This meeting will aim to align all parties on the study methodology, deliverables, timelines, communication strategies, and data collection methods. Additionally, the meeting will serve as an opportunity to delve into the specifics of the District’s current compensation philosophy and its market positioning goals.

The following key elements will be discussed:

- Overall scope of the study
- Benefit elements to be collected
- Data gathering methodology and the job matching process
- Review whether the District aims to lag, meet, or lead the market
- Use of median, mean, or other percentiles for market positioning
- Labor market agency selection
- Benchmark classifications, considering skills, competencies, and responsibilities; how benchmark classifications compare to similar roles in competitor agencies or organizations
- Various phases of the study and review of general timelines
- Channels for ongoing communication between CPS HR and the District
- How to engage with other stakeholders such as labor unions, employees, and department heads
- Deliverables and first immediate steps

Client Responsibilities and/or Pricing Assumptions Associated with Task:

- It is assumed that no more than **17** benchmark classifications will be surveyed.
 - CPS HR will complete a benchmark summary matrix describing various components of each job, such as primary duties, minimum qualifications, distinguishing characteristics, etc.
- It is assumed that no more than **8** total labor market agencies will be selected for comparison.
 - CPS HR will research up to **13** comparable labor market agencies and provide recommendations for final selection by the District.
- After the kick-off meeting, CPS HR will provide a project parameters memo for the client's review and approval, ensuring mutual alignment before progressing with the project.
 - CPS HR will furnish an estimated timeline, including key milestones, shortly following the approval of the project parameters document.

Task 3 – Design, Develop, and Distribute the Survey Instrument. The CPS HR Project Team will develop a comprehensive survey instrument to ensure the effective collection of compensation data from each of the survey agencies. The online survey will include a brief description of each of the survey classifications with a request for the minimum and maximum monthly salary for each.

For the *base salary* study, the survey instrument will include a brief description of each of the survey classifications with a request for the minimum and maximum monthly salary for each. Salaries are retrieved from published salary schedules effective on an agreed upon date.

For the *total compensation* study, the following elements of total compensation are added to the base salary survey:

- 1) Retirement Contributions - Money paid by the employer on behalf of employees (members). The data are collected for reporting and are included in total compensation calculations.
 - a. Employer Retirement Contribution - CPS HR reports and analyze a stated percentage of salary paid by the employer or the employee at the current point in time. The normal cost rate is collected, which excludes unfunded accrued liability.
 - b. Medicare – Contribution rate of 1.45% times the base salary median is used to calculate total compensation, there is no maximum compensation limit.
 - c. Social Security (if agency participates) - Contribution rate is 6.20% of the median compensation and is included in the total compensation calculation.
- 2) Health benefits data are collected for reporting and are included in total compensation calculations.
 - a. Medical, Dental, and Vision benefits, based on the maximum contribution for family coverage (employee + 2 or more dependents)
 - b. Cafeteria Plans (Flex Credit & Health Savings Account)
- 3) These data are collected for reporting purposes only and are not included in total compensation calculations.
 - a. Sick Leave
 - b. Holiday Leave
 - c. Vacation Leave
 - d. Paid Time Off
 - e. Administrative/Management Leave
- 4) Cash Add-Ons are defined as “supplemental pay and benefit components that are equivalent to cash for the employee” and are typically found in a benefit summary document or bargaining agreement. The data are collected for reporting and are included in total compensation calculations.
 - a. Retirement Pick-up (i.e., Employer Paid Member Contribution (EPMC))
 - b. Deferred Compensation (i.e., 457b, 401k, 403b)
 - c. Incentives (only education/certifications, performance)
 - d. Longevity
 - e. Allowances (only vehicle, cell phone, and uniform, as applicable)

Client Responsibilities and/or Pricing Assumptions Associated with Task:

- The District may add other benefits elements, should it desire, at an additional cost.
- The District shall complete a spreadsheet (template provided by CPS HR) detailing the District’s benefits elements and their costs/details.
- Please note that only employer costs are collected; not employee costs.

Task 4 – Review, Analyze, and Validate Labor Market Survey Data. CPS HR begins labor market data collection by researching available information online to make preliminary classification matches and obtain data. The CPS HR Project Team will reach out to labor market agencies to confirm and/or complete survey data after completing as much pre-work as possible. We find that this initial collection effort results in greater participation from the labor market agencies. Once CPS HR has completed their survey analysis tasks, the CPS HR Project Manager will audit the final data as part of our quality review process.

Classification matching includes reviewing agency background materials such as copies of classification specifications, organization charts, staffing information, and other useful materials to substantiate the accuracy of the comparability of the matches. To determine whether a match from a labor market agency is comparable to the District’s benchmark, CPS HR utilizes a whole job analysis methodology; this commonly used methodology analyzes the job as a whole, rather than by individual factors, by evaluating the core duties and responsibilities, the nature and level of work performed, and the minimum qualifications to determine whether the classification is comparable enough to be utilized as a match. The methodology recognizes slight differences in duties assigned to matches from other labor market agencies which do not impact the type, nature, and level of work performed. Matches should not be so broad that they include classifications performing dissimilar work, or work done at a higher or lower level, but they also should not be so narrow that they exclude matches doing comparable work, with slight differences in work that do not change the level and nature of work.

Client Responsibilities and/or Pricing Assumptions Associated with Task:

- Should any labor market agencies be non-responsive to requests for information, we will provide the client with contact information and request that they use their professional contacts to follow up on CPS HR’s behalf. We have found this approach to be beneficial.
- The District may add additional labor market agencies should any in the initial selection be non-responsive or not provide sufficient matches at an additional cost.
- **Responsiveness of labor market agencies is absolutely critical to maintaining the agreed timeline.** An amended timeline will be provided by the CPS HR Project Manager if the data collection period is pushed out. Any contract amendment needed due to timeline shift will be discussed with the client at the appropriate point.
- The client shall review the job matches made for each of the comparable labor market agencies. An opportunity for two rounds of feedback/updates to the job matches will be provided to the client. The client will provide any changes/edits, if needed, within two (2) weeks of initial receipt of the job matches, if not sooner.

Task 5 – Design and Develop Data Spreadsheets. Once the matches are finalized and approved, CPS HR will develop an individual data sheet for each survey classification that presents the comparable classification used in each agency with the relevant data associated with that classification, such as the position ranking within the labor market and salary range minimum and maximum.

The labor market data analyses will be conducted based upon the labor market position affirmed within the client's compensation philosophy (e.g., median, mean, or other percentile).

Client Responsibilities and/or Pricing Assumptions Associated with Task:

- The data sheets are the total deliverable (a formal report and presentations are not part of the scope of the study).

Task 6 – Conduct Internal Equity Analysis/Prepare Salary Range Recommendations/Update Compensation Structure (optional service). A well-rounded compensation program encompasses an evaluation of external labor market data as well as a careful assessment of internal job relationships aligned with the District's values. The internal equity analysis for non-benchmark classifications involves a series of essential steps to establish fair and consistent relationships. These steps include:

1. **Analysis of Pay Relationships:** This involves evaluating pay relationships based on the hierarchy of jobs and historical pay practices.
2. **Development of Guidelines:** These guidelines encompass factors like span of control and the nature and level of work performed.
3. **Recommendation of Differentials:** Based on the above analysis, we will recommend equitable and appropriate internal relationship differentials between classifications/pay grades.

Our methodology for setting salary range levels for both benchmark and non-benchmark classifications follows these steps, ensuring consistency across all District study classifications:

1. **Benchmark Classifications:** We identify benchmark classifications that serve as reference points for salary setting based on market data.
2. **Salary Recommendations:** Salary levels for benchmark classifications are established in line with market data.
3. **Internal Alignment Review:** We conduct a comprehensive review of the District's existing internal alignment differentials to assess where adjustments are needed.
4. **Internal Differentials:** Recommended internal differentials are applied within job families to determine salaries for classifications with significant relationships due to shared job series or family.
5. **Remaining Classifications:** For non-benchmark classifications or those with limited comparable data, we evaluate their alignment with other classifications based on factors such as job nature, level, and minimum qualifications.

The salary range recommendations for each study classification will include:

- Classification Title
- Current Monthly Range Maximum
- Recommended Monthly Range Maximum
- Percentage or Dollar Amount Differences between Current and Recommended Ranges, including steps within a range if desired.

This detailed information enables the District to assess the percentage and dollar amount of any increase on a classification-by-classification basis. Our approach ensures a thorough and equitable

compensation structure that aligns with both external market data and internal relationships within the organization.

Finally, updating the compensation structure itself is a complex process that involves a thorough evaluation of an organization's pay practices. The first step is to conduct a comprehensive analysis of market data, internal equity, and the organization's strategic goals. This analysis helps in identifying areas that require adjustment within the compensation structure. Some key technical aspects include:

- **Range Type Decision:** Whether to use an open range or a step system for salary scales, considering factors like flexibility and performance-based incentives.
- **Bandwidth Analysis:** Analyzing the width between the minimum and maximum salaries within each pay grade to determine the balance between cost control and talent attraction and retention.
- **Separation Between Pay Grades:** Reviewing the separation between pay grades to ensure clear distinctions in job value and responsibilities, aligning them with market standards, internal equity, and the organization's compensation philosophy. This will help easily spot situations where there is minimal pay difference between employees at different levels.

Client Responsibilities and/or Pricing Assumptions Associated with Task:

- Determination of exact cost to implement any salary range changes will be the responsibility of the client.
- The compensation structure will also be updated. For example, changes will be made to the *bandwidth* of each pay grade or the *separation* between grades.
- An Excel file with the salary range recommendations within the updated compensation structure is the total deliverable of this optional service (a formal report and presentations are not part of the scope of this phase).

Project Timeline

The CPS HR Internal Project Manager and the District will discuss varying approaches to customize a timeline after the initial kick-off meeting. CPS HR recommends a structured timeline that can be flexible to accommodate varying factors in achieving set milestones. Our timelines are based upon the assumption that

- the District is able to enforce orientation, PDQ deadlines, and the interview schedule within the designated timeframe
- selected labor market agencies will provide the information required within the specified timeframe
- the District will be able to review, comment on, and approve study products within agreed upon deadlines
- CPS HR is available to begin the work upon full contract execution on or after April 1, 2024⁶

We estimate the timeline for this scope of work to be conducted is:

- Classification Study: 3.75-4.75 months
- Total Compensation Study: 5-6 months

⁶ If the project is awarded more than 25 calendar days after the proposal submission date, CPS HR will provide an updated start date.

Cost

Professional Fixed Fee

CPS HR has prepared the following **professional fixed fee** based on the scope of work described.

Description	Price
Classification Study	\$29,900
Total Compensation Study	\$38,170
Develop Salary Recommendations and Update Compensation Structure	\$5,135
Not-to-Exceed Contract Amount: Dependent on client selections	

Pricing Assumptions

Not included in the fixed fee:	
Materials Production	CPS HR provides all documents electronically. Hard copy printing of documents for this engagement will be the responsibility of the client.
Consultant Travel Time and Expenses	We have not included travel costs since all work will be conducted virtually through the use of tele- and web-conferences and the sharing of documents through an online, secure portal provided by CPS HR.

Billing Terms

CPS HR will bill in equal installments at the following milestones.

CLASSIFICATION STUDY:

1. After client kick-off meeting
2. Approval of project parameters letter
3. Completion of incumbent interviews
4. Completion of supervisor interviews

5. Discussion of classification analysis/recommendations
6. Provision of bulleted list describing recommended classification specification updates

TOTAL COMPENSATION STUDY:

1. After client kick-off meeting
2. Provision of labor market agency research
3. Approval of project parameters letter
4. Submission of draft matches
5. Submission of data sheets
6. Provision of compensation report

It is assumed that the client will be responsive to the delivery of all draft deliverables and all subsequent revisions as defined in the agreed upon project timeline. **Unanticipated revisions or delays to the project timeline could result in a need for an addendum to the contract related to contract end date, staff assignments, and/or pricing. Any addenda will be discussed in a timely manner with the client.**

Pricing Philosophy

CPS HR is flexible with the proposed work plan; alternate approaches may be discussed with the client which may in turn change the proposed cost of the project. As described in this proposal, the methods, approach, timelines, as well as the proposed fee, have been prepared as accurately as possible based upon the services requested and study objectives described in the information provided to CPS HR.

The proposed professional fees reflect the steps and time necessary to conduct the study in a sound, thorough, and sustainable manner, including important input and review by the client's Internal Project Manager and designated stakeholders to accomplish the study objectives. If changes or additional services are required, we will be happy to discuss changes to the project activities, schedule, and/or fee proposal.