February 2, 2017 – RFP # 7171

Classification & Compensation Study Proposal

County of Merced

Submitted by:

Koff & Associates

GEORG S. KRAMMER
Chief Executive Officer

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ATTACHMENT A

SIGNATURE PAGE

(BIDDER TO COMPLETE AND PLACE IN FRONT OF PROPOSAL)

INDIVIDUAL/COMPANY Kaneko & Krammer Corp dba Koff & Associates

ADDRESS 2835 Seventh Street, Berkeley, CA 94710
(P.O. Box/Street) (City) (State) (Zip)

CONTACT PERSON: Georg S. Krammer

TITLE: Chief Executive Officer

TELEPHONE NO. 510-658-5633 FAX NO. 510-652-5633

E-MAIL ADDRESS gkrammer@koffassociates.com

The undersigned hereby certifies that he/she is a duly authorized official of their organization and has the authority to sign on behalf of the organization and assures that all statements made in the proposal are true, agrees to furnish the item(s) and/or service(s) stipulated in this Request for Proposal at the price stated herein, and will comply with all terms and conditions set forth, unless otherwise stipulated.

"I certify that I have read the Sample Agreement (Exhibit 1) pursuant to the submittal of a Request For Proposal (RFP) and will comply with said Sample Agreement, unless otherwise noted by exception herein, as of the date and time of close of this proposal".

Georg S. Krammer — Chief Executive Officer
Authorized Representative - Name — Title

February 1, 2017
Signature (in blue ink) — Date

Business License No.: (Merced City) ____________

(Merced County) ____________

Professional License No.: ____________

Taxpayer Identification No.: 61-1493064

K&A Koff & Associates
Human Resources Consulting Since 1984

February 2, 2017

Ms. Kim Nausin, Purchasing Manager
County of Merced
Dept. of Admin. Services-Purchasing
2222 M Street, Room 1
Merced, CA 95340

Dear Ms. Nausin:

Thank you for the opportunity to respond to your Request for Proposal, #7171, for a Classification and Compensation Study for the County of Merced ("County"), in order to address changes in county operations and staffing over the last several years, which may have affected the type, scope, and level of work being performed. We are most interested in assisting the County with this important study and feel that we are uniquely qualified to provide value to your organization based on our similar experience working with other counties, cities, JPAs, and non-profit agencies throughout California.

Koff & Associates ("K&A") is an experienced Human Resources consulting firm that has been providing classification and compensation consulting services to counties, cities, special districts, courts, educational institutions, and other public agencies for thirty-three (33) years. The firm is a woman-owned California small business corporation and has achieved a reputation for working successfully with management, employees, and governing bodies. We believe in a high level of dialogue and input from study stakeholders and our proposal speaks to that level of effort. That extra effort has resulted in close to *100% implementation* of all of our classification and compensation studies.

K&A ensures that each of our projects is given the appropriate resources and attention, resulting in a high level of quality control, excellent communication between clients and our office, commitment to meeting timelines and budgets, and a consistently high-caliber work product.

As Chief Executive Officer of the firm, I would assume the role of Project Director and be responsible for the successful completion of each project. I can be reached at our Berkeley address and the phone number listed on the cover page. My email is gkrammer@koffassociates.com.

This proposal will remain valid for at least ninety (90) days from the date of submittal. Please call if you have any questions or wish additional information. We look forward to the opportunity to provide professional services to the County of Merced.

Sincerely,

Georg S. Krammer

Georg S. Krammer
Chief Executive Officer

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EXECUTIVE SUMMARY

The County desires human resources consulting assistance to review and compare the current salaries of benchmark job classifications and unrepresented management classifications with the salaries of similar or equivalent classifications within the organizational structure of a pre-established group of seven (7) comparative counties (Fresno, Kern, Kings, Madera, Stanislaus, San Joaquin, Tulare), in order to ensure that the County is in a long-term competitive position to recruit and retain a talented workforce.

The study will recommend changes that result in equitable, competitive and legally defensible pay practices that will enrich the attraction and retention of qualified individuals as well as enhance opportunities for growth and professional development; evaluate the current employee benefit and compensation plan against comparable employers; provide recommendations for adjustments.

The County currently employs approximately one thousand seven hundred seventy (1,770) employees, within five hundred seventy-two (572) classifications. There are twenty-eight (28) benchmark classifications in the represented groups, and two hundred eighteen (218) unrepresented management classifications for review at this time. The study will review the current internal relationships between the benchmark and related classifications within a series and make recommendations to enhance the competitiveness and efficiency of the County's compensation plan. Further recommendations will be made regarding current placements as well as practices and procedures for the placement of management classifications with the County's Management Category Designation System, Levels A - E.

The Study's purpose is to review the County's compensation structure for the studied classifications and to conduct a total compensation market survey (salaries plus benefits) using the pre-determined list of seven (7) other counties as comparator agencies. The confirmation of comparator agencies, benchmark classifications, and benefits to be collected is an iterative process that includes all stakeholders. We have found this open discussion philosophy to be critical to our success for organizational buy-in. Once the external data development is completed, we will make specific recommendations for internal equity for non-benchmarked classifications and classifications without a large enough market sampling.

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

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

EXCEPTIONS

Koff & Associates ("K&A") takes no exceptions to the Scope of Work, General Provisions, Special Provisions, Submission Instructions, any other part of the RFP or the Sample Agreement.

Additional Information:

We will be pleased to sign a contract or professional services agreement for any classification or compensation work, we are asked to perform for the County.

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

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

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

Koff & Associates has been in business in California for thirty-three years and has always been in good standing, is financially stable, and has no past or pending litigation.

APPROACH

Study Objectives

- To review and understand all current documentation, rules, regulations, policies, procedures, budgets, class descriptions, organizational charts, memoranda of understanding ("MOU"), personnel policies, wage and salary schedules, and related information so that our recommendations can be operationally incorporated with a minimum of disruption;
- To conduct start-up Study Project Team meetings with management, study project staff, and other stakeholders to discuss any specific concerns with respect to the development of compensation recommendations; finalize study plans and timetables; conduct employee orientation sessions with management and staff in order to educate and explain the scope of the study and describe what are and are not reasonable study expectations and goals;
- To make recommendations regarding a list of appropriate comparator agencies, benchmark classifications, and benefits to be collected prior to beginning the compensation portion of the study;
- To collect accurate salary and benefit data from the approved group of comparator agencies and to ensure that the information is analyzed in a manner that is clear and comprehensible to the Study Project Team, Human Resources, management, the governing body, and employees;
- To carefully analyze the scope and level of duties and responsibilities, requirements for successful work performance, and other factors for survey classes according to generally accepted compensation practices;
- To review the County's compensation structure and practices and develop compensation recommendations that will assist the County in recruiting, motivating, and retaining competent staff;
- To develop a compensation structure that meets all legal requirements, is totally non-discriminatory, and easily accommodates organizational change, growth, and operational needs;
- To develop solutions that address pay equity issues, analyze the financial impact of addressing pay equity issues, and create a market adjustment implementation strategy supporting the County goals, objectives, and budget considerations;
- To evaluate benefit offerings in the labor market and make recommendations for better alignment and/or different benefit offerings as indicated by the analysis and best practices;
- To create a comprehensive final report summarizing the compensation study approach and methodology, analytical tools, findings, and recommended compensation structure;
- To recommend appropriate internal salary relationships and allocate classes to salary ranges in a comprehensive salary range plan;
- To work collaboratively and effectively with the County and its stakeholders while at the same time maintaining control and objectivity in the conduct of the study;
- To document all steps in the process and provide documentation and training for Human Resources and other staff, as appropriate, in compensation analysis methodologies so that the County can integrate, maintain, administer, and defend any recommended changes after the initial implementation; and
- To provide effective ongoing communications throughout the duration of the project and continued support after implementation.

Methodology / Work Plan / Deliverables

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

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

We are open to facilitating a meeting with the County's Board of Supervisors to ensure that we set appropriate expectations of this project, receive any direction, and provide any educational information, as appropriate.

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

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

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

During the initial meeting with the Study Project Team, we will discuss and agree to the compensation study factors. We will confirm the predetermined list of seven (7) comparator agencies that will be included in the external market survey, which will be the foundation of ensuring that the agencies' salaries for the studied classifications are competitively aligned with the external labor market. We will also confirm those classifications that will be surveyed in the market (i.e., benchmark classifications), with the intention of internally aligning the remaining classifications with those that were surveyed. Finally, we will determine the list of benefits that the agency wants to include in the total compensation data gathering process.

1. Determination of Comparator Agencies

The selection of comparator agencies is considered a critical step in the study process. During the Q&A process for the RFP, the County indicated it may consider additional survey agencies above and beyond the 7 negotiated ones. When we make recommendations for comparator agencies, we typically use the following factors to identify appropriate agencies and will receive approval before proceeding with the total compensation survey.

Our recommended methodology is that we involve the Board, management, Human Resources, and employee representation in the decision-making process of selecting which comparable agencies are included, **PRIOR** to beginning the study. Our experience has shown that this is the most successful approach. The factors that we typically review when selecting and recommending appropriate comparator agencies include:

- ***Organizational type and structure*** – While various organizations may provide overlapping services and employ some staff having similar duties and responsibilities, the role of each organization is somewhat unique, particularly in regard to its relationship to the citizens it serves and level of service expectation. During this iterative process, the County's predetermined list of comparators and the advantages/disadvantages of including them or others will be discussed.
- ***Similarity of population served, County demographics, County staff, and operational budgets*** – These elements provide guidelines in relation to resources required (staff and funding) and available for the provision of services.
- ***Scope of services provided*** – While having an organization that provides all of the services at the same level of citizen expectation is ideal for comparators, as long as the *majority* of services are provided in a similar manner, sufficient data should be available for analysis.
- ***Labor market*** – The reality of today's labor market is that many agencies are in competition for the same pool of qualified employees. Individuals often do not live in the community they serve. Therefore, the geographic labor market area (where the County may be recruiting from or losing employees to) will be taken into consideration when selecting potential comparator organizations.
- ***Cost-of-living*** – The price of housing and other cost-of-living related issues are some of the biggest factors in determining labor markets. We will review overall cost-of-living of various geographic areas, median house prices, and median household incomes to determine the appropriateness of various potential comparator agencies.

We typically recommend using ten to twelve (10-12) comparator agencies but are flexible and can easily use a different approach based on the County's preference to use the existing list of 7 comparative counties. In communication with our office, it was stated the County "would be open to looking at other agencies in addition, if justified." As stated above, this discussion will be included in this step.

2. Determination of Benchmark Classifications

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

"Benchmark classes" are ordinarily chosen to reflect a broad spectrum of class levels. In addition, those that are selected normally include classes that are most likely to be found in other similar agencies, and therefore provide a sufficient valid data sample for analysis. Internal relationships will be determined between the benchmarked and non-benchmarked classifications and internal equity alignments will be made for salary recommendation purposes. Due to the fact that the labor market typically yields reliable data, we recommend using approximately 60-65% of all classifications as benchmarks. This would apply to the County's list of 218 unrepresented classifications, i.e., we will go through a process of determining which ones to survey/benchmark. In addition, we will survey the—28 represented benchmark classifications that the County has already predetermined.

3. Determination of Salary and Benefits Data to Be Collected

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

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

Deliverable C. Data from Comparators

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

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

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

We typically collect classification descriptions, organization charts, salary schedules, personnel policies, MOUs, and other information via website, by telephone, or by an onsite interview. With the prior knowledge from the data gathered directly from each comparator agency and our experience in the public sector human resources field, our professional staff makes preliminary "matches" and then schedules appointments by telephone, or sometimes in person, with knowledgeable individuals to answer specific questions. We find that the information collected using these methods has a very high validity rate and allows us to substantiate the data for employees, management, and governing bodies.

Deliverable D. Analysis and Preliminary Review of Data

Data will be entered into spreadsheet format designed for ease of interpretation and use. The information will be presented in a format that will identify the comparator positions used for each classification comparison. Information will be calculated based upon both average and median figures allowing the County to make informed compensation decisions. Other elements of the compensation survey report are agencies surveyed; comparable class titles; salary range maximum/control point; number of observations; and percent of the County's salary range is above/below the market values.

In addition, we will include any type of statistical representation and analysis that the County desires such as 60th, 70th, or any other percentiles.

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

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

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

Deliverable F. Analysis of Internal Relationships and Alignment

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

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

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

Deliverable G. Compensation Structure and Implementation Plan

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

We will conduct a competitive pay analysis using the market data gathered to assist in the determination of external pay equity and the recommendation of a new base compensation structure. We will conduct a comparative analysis to illustrate the relationships between current pay practices and the newly determined market conditions and develop solutions to address pay equity issues, analyze the financial impact of addressing pay equity issues, and create a market adjustment implementation strategy supporting County goals, objectives, and budget considerations. We will develop recommendations covering special compensation issues such as salaries above the maximum; seniority; promotions; maintenance of the salary schedules; etc.

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

Deliverable H. Final Report and Guidelines for Implementation

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

- A set of all market data spreadsheets;
- A proposed Salary Range document;
- A procedure to address employees whose base pay exceeds the maximum of their newly assigned pay range;
- Implementation issues and cost projections surrounding our recommendations; and
- A guide for rules, policies and procedures for the County in implementing, managing and maintaining the compensation system.

Once all of the County's questions/concerns are addressed and discussed, a Final Report will be created and submitted in bound format. The Final Report will incorporate any appropriate revisions identified and submitted during the review of the draft report.

Deliverable I. Formal Appeals Support

Should the County have a formal appeal process regarding the allocation of positions to classifications and of classifications to salary ranges, this proposal does not cover time regarding a formal appeal process. Should our on-site participation be desired, our stated composite hourly rate will be honored. As mentioned above, however, our internal process usually addresses any appeal issues.

Deliverable J. Final Presentation

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

Post-Implementation Consultation and Support

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

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

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

Stakeholder Engagement

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

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

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

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

Time Requirements

Our professional experience is that studies of this scope and for this size organization take approximately four (4) months to complete, allowing for compensation data collection and analysis, review steps by the County, the development of final reports, any appeals, and presentations. However, since represented classifications are often more pressing due to contractual obligations for negotiations etc., we could easily fast track the 28 represented benchmarks. In addition, the County would receive market data long before the end of the four-month period with a draft report that will be presented under Deliverable D below.

The following is a suggested timeline (which can be modified based on the County's needs):

Deliverables	Classification and Compensation Study	Completion By:
A.	Meetings with the Study Project Team and Management Staff for Review of Process, Products and Documents Required	Week 1
B.	List of Comparator Agencies, Benchmark Classifications, and Benefits to be Collected	Week 1
C.	Data from Comparators 1. 28 represented benchmarks 2. Represented classifications	 Week 8 Week 10
D.	Analysis and Preliminary Review of Data 1. 28 represented benchmarks 2. Represented classifications	 Week 10 Week 12
E.	Draft Compensation Findings/Additional Analysis/Study Project Team Meetings 1. 28 represented benchmarks 2. Represented classifications	 Week 12 Week 14
F.	Analysis of Internal Relationships and Alignment	Week 15
G.	Compensation Structure and Implementation Plan	Week 15
H.	Final Report and Guidelines for Implementation	Week 16
I.	Formal Appeals Support *	As Needed
J.	Final Presentation	As Scheduled

BIDDER'S QUALIFICATIONS

Koff & Associates ("K&A") is a majority woman-owned public sector human resources consulting firm that was founded in 1984 by Gail Koff; K&A has been assisting cities, counties, special districts, other public agencies, and non-profit organizations with their classification and compensation needs for thirty-three (33) years.

We are a private corporation and our legal name is Kaneko & Krammer Corp. dba Koff & Associates. Our headquarters are located in Berkeley, CA and we have satellite offices in Southern California, the Central Valley, and the Sacramento Region. We are a California State-certified Small Business Enterprise and a locally certified Very Small Local Business Enterprise (through County of Alameda). We are also a certified Small Local Business (SLB) through the County of Alameda.

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

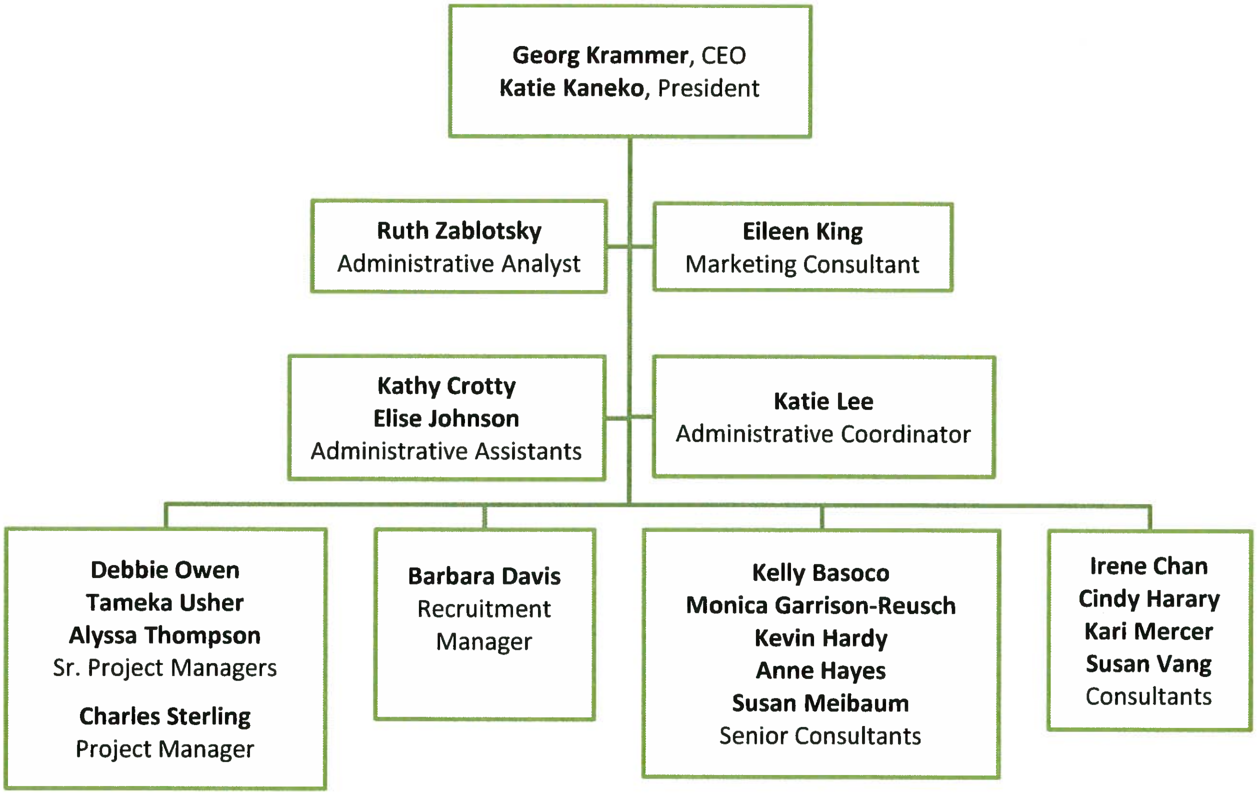
The firm's areas of focus are classification and compensation studies (approximately 70% of our workload); organizational development/assessment studies; performance management and incentive compensation programs; development of strategic management tools; policy/procedure development and employee handbooks;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

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

Our long list of clients is indicative of our firm's reputation as being a quality organization that can be relied on for producing comprehensive, sound, and cost-effective recommendations and solutions. K&A has a reputation for being "hands on" with the ability and expertise to implement its ideas and recommendations through completion in both union and non-union environments.

K&A relies on our stellar reputation and the recommendations and referrals of past clients to attract new clients. Our work speaks for itself and our primary goal is to provide professional and technical consulting assistance with integrity, honesty and a commitment to excellence. We are very proud of the fact that we have not had any formal appeals in 33 years, working with hundreds of public agency clients and completing hundreds of classification and compensation studies.

Our entire team consists of twenty-one (21) employees as shown below in our organizational chart.


Georg Krammer, CEO
Katie Kaneko, President
Ruth Zablotsky
Administrative Analyst
Eileen King
Marketing Consultant
Kathy Crotty
Elise Johnson
Administrative Assistants
Katie Lee
Administrative Coordinator
Debbie Owen
Tameka Usher
Alyssa Thompson
Sr. Project Managers
Charles Sterling
Project Manager
Barbara Davis
Recruitment Manager
Kelly Basoco
Monica Garrison-Reusch
Kevin Hardy
Anne Hayes
Susan Meibaum
Senior Consultants
Irene Chan
Cindy Harary
Kari Mercer
Susan Vang
Consultants

No subcontractors will be assigned to this study.

Staff Assignment

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

Following are short biographies of the specific staff who will be assigned to this study (full résumés may be found in the Appendix):

Catherine "Katie" Kaneko, C.P.A., P.H.R.
President

Katie brings more than twenty-five (25) years of management level human resources experience to Koff & Associates, both as a human resources director and as a management consultant in the hi-tech industry as well as the public sector. She has extensive experience in compensation including equity plans and performance incentive programs, survey design and reporting, recruitment in both the public and private sector; staffing; classification and job analysis; compensation and job evaluation techniques, employee relations, retention strategies, infrastructure development; coaching; policy and procedure development; mergers and acquisitions; change management and employee training.

With a Bachelor in Business Administration, Katie started her career as a Certified Public Accountant (CPA) in an international accounting/consulting firm. She transitioned into Human Resources within the firm to become the Human Resources Director of the San Francisco office. She then moved into the hi-tech industry where she served in leadership positions for high-growth, startup, and organizations in transition. Her primary focus in recent years has been in classification, compensation, and recruitment services in the public sector.

Katie's experience provides a broad knowledge of human resource management within diverse organizations. Her background provides her a strong ability to understand the big picture, identify problems and solutions, and effectively implement them. Her skill set complements our current consultant base with additional levels of service areas. Katie joined K&A in 2003 and has been the firm's President since 2005.

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

Debbie Owen, CCP
Senior Project Manager

Debbie has over twenty (20) years of experience providing classification and compensation consulting services to public sector agencies; she has worked with clients across local government including cities, counties, special districts, and transit agencies. Her project roles include serving in the capacity of either project team member or project manager. Prior to beginning her public sector consulting career, Debbie worked as a Compensation and Benefits Specialist in the private sector for five (5) years.

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

Her specialized, diverse experience includes serving as a project team member on classification projects by facilitating employee orientation sessions, conducting employee job evaluation meetings, researching/evaluating classification concepts, analyzing data for employee allocations, developing/revising classification specifications and preparing classification reports. Her compensation experience includes base salary or total compensation survey development, labor market agency research and recommendations, comparable agency job matching, compensation data analysis, salary recommendations and preparing compensation reports. In addition to serving as a team member, Debbie has often served as a project manager, working with clients to evaluate their classification and compensation needs, directing the work of teams to provide high quality deliverables consistent with best practices, presenting study findings to client stakeholders, and addressing feedback from the client.

Debbie also served as a Co-Trainer for her previous employer for their two-day course on Classification and Compensation, one of several courses offered in their HR Academy (a series of 6 HR program trainings in Classification and Compensation, Recruitment/Selection, Job Analysis, etc.).

Since joining K&A, Debbie has worked on the following classification and compensation projects, either as Co-Project Director or as Sr. Project Manager: **County of El Dorado**; **County of Trinity**; **County of Bernalillo** (New Mexico); City of Campbell (included FLSA analysis); City of Redwood City; City of National City; Contra Costa County Employee Retirement System; El Dorado Hills Community Services District; Sweetwater Authority; Livermore Area Recreation and Parks District; Alameda-Contra Costa Transit; Truckee Sanitary District; Trabuco Canyon Water District (FLSA analysis included); Western Municipal Water District (retirement system practices survey).

Debbie will serve as the Co-Project Director for this study; she will help coordinate all of K&A's efforts, will attend all meetings with the County, and will be responsible for work products and deliverables, as well as provide consultant support throughout the effort, including compensation analysis, internal job analysis, development of recommendations, and implementation strategies.

Monica Garrison-Reusch, BA, MBA
Senior Consultant

Monica has over thirteen (13) years of human resource program experience, all of which have been spent serving as either a team consultant or project manager on projects working with public sector agencies. Monica's primary professional focus over the last several years has been on classification and compensation practices.

Prior to joining K&A Monica worked as a project consultant with another consulting firm serving as either a team member or project manager on varied projects including large scale studies done for **the County of Madera, the County of Sacramento, the County of Bernalillo (New Mexico),** and the California State Department of Personnel Administration, and smaller specialized studies for agencies such as the Sacramento Municipal Utilities District, Hayward Unified School District, **Orange County, Ventura County**, and Orange County Transportation Authority.

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

Monica also served as a Co-Trainer and worked on the development of training materials for her previous employer for their two-day course on Classification and Compensation, one of several courses offered in their HR Academy (a series of 6 HR program trainings in Classification and Compensation, Recruitment/Selection, Job Analysis, etc.).

Since joining K&A, Monica has worked on studies for the following clients: East Bay Municipal Utility District, Trabuco Canyon Water District, Cosumnes Community Services District, **County of Trinity, County of El Dorado**, City of Vallejo, City of Pleasant Hill, and City of Crescent City.

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

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

Kari Mercer, B.S.
Consultant

Kari's professional qualifications include over eight (8) years of experience in the Human Resources field, including work in classification and compensation, employee relations, and recruitment and examination. Her experience includes both private and public sector Human Resources work for the County of Madera, County of Fresno, and Macy's. She gained experience in classification and compensation, labor relations, MOU administration, policy development and administration, recruitment and examination, and general human resources administration.

As a Human Resources Consultant for another private human resources consulting firm she specialized in conducting classification and compensation studies for multiple public sector agencies including cities, counties, and special districts. While there, some of the cities and counties for whom she performed work in partnership with other consultants at that firm were: City of Anaheim, City of Concord, City of Palmdale, City of Redding, County of Lake, County of Madera, County of Monterey, and County of Sacramento. Her experience with special districts includes projects for: California Joint Powers Risk Management Authority, East Bay Regional Park District, Elk Grove Water District, San Diego Association of Governments, San Francisco Municipal Transportation Agency, and Ventura Regional Sanitation District. Additionally, Kari consulted for out-of-state clients in Maryland, New Mexico, and Texas.

Since joining Koff & Associates in 2016, Kari has worked on a variety of classification and compensation projects for the City of Redwood City, City of San Pablo, City of Santa Clara, City of Seaside, First 5 of Alameda County, Mendocino Coast Recreation and Park District, Sweetwater Authority, and Truckee Sanitary District.

Kari earned her B.S. degree in Business Administration with an emphasis on Human Resources Management at California State University, Fresno. Kari serves as a Personnel Commissioner for the City of Clovis, and is a member of IPMA-HR and Central California SHRM.

Kari will provide consultant support throughout this effort, including compensation analysis, internal job analysis, development of recommendations, and implementation strategies.

References

We would like to mention that we are currently in the midst of County-wide Classification and Compensation study for County of El Dorado.

Agency & Project	Contact
County of San Mateo Various Classification and Compensation Studies, 2012 and 2014. Comprehensive classification and compensation study of Information Services Department.	**Ms. Lisa Yapching** Classification and Compensation Mgr. San Mateo County HR Department (650) 363-4381 455 County Center, 5th Floor Redwood City, CA 94063 lyapching@smcgov.org
County of El Dorado Countywide Classification and Compensation Study, begun in 2016; at midway point as of February 2017.	**Ms. Erin Hane** Human Resources Manager (530) 621-6553 330 Fair Lane Placerville, CA 95667 erin.hane@edcgov.us
County of San Joaquin Total Compensation Study, Executive Group, 2016	**Ms. Jan Bentley** HR Personnel Analyst (209) 468-8479 44 N. San Joaquin St., Suite 330 Stockton, CA 95202 jbentley@sjgov.org
County of Sonoma Various Classification and Compensation Studies since 2013. Classification Study for the Information Services Dept., currently being finalized; we are currently in the midst of a Class/Comp Study for the Open Space District and a Class/Comp Study for the Sonoma County Water Agency.	**Ms. Golbou Ghassemieh** HR Assistant Director (707) 565-2148 575 Administrative Drive Santa Rosa, CA 95403 golbou.ghassemieh@sonoma-county.org
County of Tuolumne Classification and Compensation Study, completed 2015.	**Ms. Ann Fremd** HR/Risk Manager (209) 533-6632 2 South Green St. Sonora, CA 95370 AFremd@co.tuolumne.ca.us

COST PROPOSAL

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

In fact, our firm has never had a formal appeal to any of our studies in our thirty-three (33) years in business. It has been our experience that the money and time invested in stakeholder communication throughout the study are money and time saved during implementation. Numerous times our firm has been hired after an agency has gone through an unsuccessful study whose results were rejected or appealed and whose implementation was very controversial. The result was a divided organization with hostility and animosity between employees/employee representation and management. Whenever our firm was hired after such an unfortunate experience, study stakeholders were amazed at our open and all-inclusive process, our efforts to elicit equal stakeholder input, and our development of recommendations that were accepted as fair and reasonable and understood by management, employees, and the governing body. Our success rate is also attributable to the fact that we have 33 years of experience working with employees of all types of backgrounds, educational levels, and work experiences, and we are accustomed to successfully communicating with and educating them throughout the process. It is imperative that all employees eventually buy into the study results and recommendations, whether they have been through a process like this before or whether this is the first time for them.

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

The cost proposal below includes two options depending on scope of work. Of course, the County may select any combination thereof and we are open to negotiating a third option if it better serves the County. We hope to be able to negotiate a scope of work and cost option that best serves the County's needs.

Deliverables	Classification and Compensation Study	Option 1: Hours	Option 2: Hours
A.	Meetings with the Study Project Team and Management Staff for Review of Process, Products and Documents Required	12	12
B.	List of Comparator Agencies, Benchmark Classifications, and Benefits to be Collected	12	12
C.	Data from Comparators	190	310

	Option 1: ***28** represented benchmarks plus approx.* ***110*** *unrepresented benchmarks,* ***7*** *comparators* ***Option 2:*** ***28** represented benchmarks plus approx.* ***130*** *unrepresented benchmarks,* ***10*** *comparators*		
D.	Analysis and Preliminary Review of Data ***Option 1:*** ***28** represented benchmarks plus approx.* ***110*** *unrepresented benchmarks,* ***7*** *comparators* ***Option 2:*** ***28** represented benchmarks plus approx.* ***130*** *unrepresented benchmarks,* ***10*** *comparators*	95	155
E.	Draft Compensation Findings/Additional Analysis/Study Project Team Meetings	35	60
F.	Analysis of Internal Relationships and Alignment	40	40
G.	Compensation Structure and Implementation Plan	20	20
H.	Final Report and Guidelines for Implementation	16	16
I.	Formal Appeals Support *	0	0
J.	Final Presentation	8	8
	Anticipated hours for additional unscheduled meetings and phone calls	8	8
	Total Professional Hours	**436**	**641**
	Combined professional and clerical composite rate: **$125/Hour**	**$54,500**	**$80,125**
	Expenses **are included** in our combined composite rate:	**N/A**	**N/A**
	Expenses include but are not limited to duplicating documents, binding reports, phone, fax, supplies, postage, travel expenses, per diem, etc.		
	TOTAL NOT-TO-EXCEED COST FOR PROJECT:	**$54,500**	**$80,125**
	*Additional consulting will be honored at composite rate **($125/Hour)**		

ATTACHMENT B

LOCAL VENDOR PREFERENCE CERTIFICATION

I certify that my company meets all of the following qualifications to be eligible for a local vendor preference in accordance with the requirements of Merced County's local preference policy, Section 5.12.025 of the County Code.

a. A principal place of business located within the County of Merced with a valid and verifiable business license, if applicable, issued by a city within the County or a business located in the unincorporated areas of the County. Post Office Boxes do not qualify as verifiable local business addresses;

b. Employs at least one (1) full-time employee within the County, or if the business has no employees, shall be at least fifty percent (50%) owned by one or more persons whose primary residence(s) is located within the County; and

c. Has had a fixed office or place of business having a street address within the County for at least six (6) months immediately prior to the issuance of the request for competitive bids by the County.

I make this certification on behalf of my company with the full knowledge that should I provide any information that proves to be false, my company will be ineligible to conduct business with Merced County for a period of not less than three (3) months and not more than twenty-four (24) months as determined at the sole discretion of the County. The County also has the right to terminate all or part of any Agreement entered into with any such company.

A certification form must be submitted for each competitive procurement request.

Bid Number 7171

Company Name Kaneko & Krammer Corp dba Koff & Associates

Address 2835 Seventh St, Berkeley, CA 94710

Business License Number and Jurisdiction BL-003901 Berkeley

Tax ID Number (TIN) 61-1493064

Phone Number 510-658-5633

Printed Name George S. Krammer

Signature (in blue ink)

Date February 1, 2017

Signature Page

Koff & Associates intends to adhere to all of the provisions described in RFP # 7171.

This proposal is valid for ninety (90) days.

Respectfully submitted,

By: KOFF & ASSOCIATES
State of California

Georg S. Krammer **February 2, 2017**
Chief Executive Officer

Koff & Associates
Human Resources Consulting Since 1984

Appendix:

Résumés of Participating Staff

Catherine B. Kaneko

SUMMARY

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

KEY ACHIEVEMENTS AND HIGHLIGHTS

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

PROFESSIONAL EXPERIENCE

Koff & Associates, Berkeley, CA

Associate and Senior Project Manager, 2000-2005
President, 2005-Present

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

Xpedior, San Francisco, CA

Human Resources Director, 1997-2000

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

SEGA of America, Redwood City, CA

Human Resources Generalist, 1993-1996
Compensation Manager, 1996-1997

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

TPA Company, San Francisco, CA

Human Resources Manager/Financial Controller, 1992-1993

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

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

Human Resources Director, 1986-1992

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

EDUCATION & CERTIFICATIONS

BS – Business Administration: California State University, Hayward
CPA – Certified Professional Accountant
PHR – Professional Human Resource Certificate

PROFESSIONAL AFFILIATIONS

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

Debbie Owen

KEY ACHIEVEMENTS AND HIGHLIGHTS

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

PROFESSIONAL EXPERIENCE

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

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

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

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

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

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

Ralph Andersen & Associates/Johnson & Associates
June, 1995 – March, 2003

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

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

EDUCATION

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

PROFESSIONAL AFFILIATIONS

- Member, *WorldatWork*

MONICA GARRISON REUSCH

PROFESSIONAL SUMMARY:

April 2016 – Present

Senior Consultant, *Koff & Associates, Berkeley CA*

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

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

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

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

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

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

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

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

EDUCATION:

University of Southern California, Los Angeles
Bachelor's Degree, Business Administration with an emphasis in entrepreneurship.

Golden Gate University, Sacramento CA
MBA with an emphasis in marketing.

KARI L. MERCER

Professional Experience:

February 2016 – Present
Human Resources Consultant, *Koff & Associates, Berkeley CA*
Provide professional support on classification and compensation studies for a variety of public sector clients, including special districts, cities, and counties.

- **Classification**: Conduct in-depth analysis of classifications and positions to include job evaluation interviews, identifying and defining classification concepts, developing and modifying classification specifications, and recommending position allocations; perform comprehensive analysis of duties performed in individual positions to determine suitability of employee requests for reclassification.
- **Compensation**: Base salary and total compensation data collection and analysis.

December 2014 to February 2016
Project Consultant/Senior Human Resources Consultant, *CPS HR Consulting Services, Sacramento CA*
Performed a wide variety of duties in support of the Classification and Compensation unit serving public sector clients including cities, counties, special utility districts, transit agencies, and education institutions throughout California and nationwide.

- **Classification**: Performed detailed analysis of classifications and positions; conducted job evaluations for broad classifications as well as individual positions to make recommendations for classification modification and allocation; crafted classification specifications for a broad range of classifications and bodies of work; composed technical reports of recommendations.
- **Compensation**: Identified benchmarks and created survey instruments for collecting base salary and total compensation data collection; evaluated benchmarks and comparable classifications for purposes of comparison and analysis; composed technical reports presenting and interpreting findings.

May 2010 to December 2014
Independent Contractor of Administrative Services, *Self-employed, Fresno CA*

- Performed administrative support services for three medical providers to assist in the transition to electronic health records and ensure ongoing compliance with Meaningful Use standards and regulations.
- Reviewed and audited medical reports and patient records and served as the clearinghouse for all patient prescription refills to ensure compliance with regulatory requirements.

May 2003 to May 2010
Stay-at-Home Mother, *Fresno CA*

May 1998 to May 2003, Employee Relations Officer/Senior Personnel Analyst, *County of Madera Human Resources, Madera CA*
Served both as the Employee Relations Officer and the Senior Personnel Analyst for the County assuming responsibility for general HR administration duties as well as the labor relations representative.

- **Labor Relations:** Served as the County representative during contract negotiations and meet and confer sessions with labor units advising the contracted negotiator as to County

policy and procedures; debriefed the County Administrative Officer and the Board of Supervisors on labor relations matters; interpreted and advised management, employees, and others on MOU provisions; heard and evaluated employee grievances.
- **Civil Service:** Served as the Secretary to the Civil Service Commission; advised member of the Commission on the sections of the County Code which governed Commission activities; interpreted and advised management, employees, and members of the public on the Civil Service sections of the County Code; developed, implemented, and administered policies and procedures to ensure HR and Civil Service Commission activities complied with the County Code.
- **Classification and Compensation:** Conducted classification studies; developed new classifications and recommended classification allocations; reviewed, analyzed, and made recommendations to the Board of Supervisors on employee requests for reclassification; conducted compensation studies for the creation of new classifications and alignment of existing classifications with the County's labor market.
- **Recruitment:** Supervised professional and technical staff tasked with the recruitment function for the County; ensured that recruitment activities complied with applicable laws, rules, regulations, and codes.

April 1997 to May 1998, Employment Coordinator, *Macy's*
- Assumed responsibility for talent acquisition for the Fresno stores; monitored vacancies and ensured that vacancy rates were kept below prescribed percentages in each department.
- Implemented and administered training and orientation programs for all new hires.
- Served on the three-person team tasked with the responsibility of implementing and administering changes and complete overhauls of the point of sale system for the stores which included developing and presenting store-wide training when changes were made.

EDUCATION:

California State University Fresno

Bachelor's Degree, Business Administration/Human Resource Management

AFFILIATIONS:

- **IPMA-HR:** Member
- **City of Clovis Personnel Commission:** Chairperson