
4.0 *Scope of Work and Methodology*

In this section, we provide our approach and methodology for conducting the Compensation and Classification Study for Covington Independent Public Schools (CIPS); a detailed work plan—identifying the tasks, activities, and milestones necessary to accomplish the deliverables in the scope of work of the Request for Proposals; our proposed timeline; and the structure and content of our work product. Attached is a sample Job Description Questionnaire (i.e., Job Assessment Tool).

4.1 Approach and Methodology

Evergreen Solutions is uniquely qualified to conduct a Compensation and Classification Study for CIPS as our team includes recognized experts in K-12 human resources management and understands that there is not a “one size fits all” solution to compensation management. Our approach is built on working collaboratively with all parties to make sound, implementation-focused recommendations. Specifically, we have developed a methodology that:

- focuses on market competitiveness;
- is based on the organization’s compensation philosophy;
- recognizes that compensation is comprised of more than just base pay levels;
- reflects changes in recent compensation strategies;
- designs custom solutions that take into account the diversity of needs present in the organization and allows you to select the components and options that best meet your overall needs; and
- produces a structure that improves the organization’s ability to recruit, reward, motivate, and retain talent in a competitive environment that includes both public and private sector employers.

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

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

Progressive organizations now recognize that to effectively recruit, reward, motivate, and retain employees, compensation management requires



Kick Off Meeting

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

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

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

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

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

At this time, we will also request a copy of the employee database that reflects current classification and compensation data.

Communication Plan

Communication is a critical component of any Compensation and Classification Study. Communicating with employees directly and early in the process builds support for the process and the accompanying outcomes. As part of our communication plan, we meet first with key project staff to fully understand the nature and scope of the project. The results of these meetings are then communicated to employees during the project outreach through employee orientation sessions, focus groups, and interviews. Regular updates are provided to the client's Project Manager and can be posted on the client's intranet site, if available and desired. Additionally, the communication plan for the distribution of the end product, particularly how the results will be distributed to employees, is also critical.

Employee Orientation and Focus Groups

Based on client feedback and a review of best practices, we have designed an orientation curriculum that provides employees insight into the process as well as provides a forum for answering questions and soliciting participation. Following the orientation sessions, we begin the focus group process. Focus groups are used to gain detailed insight into employee perceptions, concerns, and issues. The protocol for the sessions is provided to your project team in advance and refined to meet your needs.

We have found that employee orientation sessions and focus groups are critical venues for building employee participation and buy-in. Since they



**Department Head
Interviews**

take place at the outset of the project, they are a critical introduction to the project and the question-and-answer formats allow employees to become engaged in the process. During these sessions, Evergreen's consultants can also help to manage expectations since some employees may have unrealistic expectations based on anecdotal information.

**Job Assessment
Tool and
Management Issue
Tool**

Evergreen staff conduct one-on-one interviews with department heads (in addition to any other employees the client determines is necessary to identify challenges for consideration. These interviews will allow our staff to add details to our understanding of the organization and its needs. They also allow our consultants the opportunity to better understand the organizational structure of each department as well as the unique recruiting and retention issues that may be present in each department. Frequently, department directors and senior management serve as invaluable resources in explaining how internal equity relationships have evolved over time and explaining the nuances between the differences in jobs.

Another important activity undertaken at this time is the distribution of Evergreen's Job Assessment Tool® (JAT). These questionnaires are central components of the job evaluation process. The JAT asks a series of questions regarding an employee's job that captures the nature of the job and how it interacts with work within the organization.

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

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

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

Exhibit 4-1 below depicts a screenshot of the JAT home screen showing the levels of access for a Supervisor. Supervisors have access to their own surveys in addition to the ability to review and approve the surveys of their direct reports. The supervisor review process ensures validation of the JAT data collected from employees and prevents comments made by employees from being taken out of context.



Exhibit 4-1 Supervisor's JAT Home Screen

JOB ASSESSMENT TOOL

Questionnaire

Project Name: Sample City Camp & Class 2024

To get started, please use the buttons below. You may logout and return to this survey as often as you would like over the course of the completion period.

Employee JAT

Supervisor I Review

Management Issues Tool

To download or print a copy of your JAT [Click Here](#).
For assistance, please email jat3@consultevergreen.com

Source: Evergreen Solutions, 2025

Exhibit 4-2 illustrates how Evergreen uses the JAT to collect functional details of employee's jobs. Seeking to understand how employees summarize their responsibilities in their own words allows our analysis to expand beyond what may be conveyed in a traditional job description. An informal survey of municipal employees revealed that 90 percent felt that the job descriptions held on file with their employers were inaccurate or incomplete representations of their duties. Understanding this, Evergreen designed the JAT to fill in those gaps to ensure that the entirety of an employee's job is analyzed within the context of the study.



Exhibit 4-2 Job Description and Responsibilities

Basic Information

Job Introduction

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

Supervisory Responsibilities

Please indicate below the number of people you supervise directly and/or indirectly. Direct supervision is the management or supervision of employees who report work to you and who you evaluate without assistance. Indirect supervision is the management or oversight of employees who report to you through another supervisor who reports directly to you. Please do not include subcontractors.

Directly

Indirectly

Type of Work

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

☐ Clerical/Manual Perform a variety of office and administrative support duties OR unskilled labor intensive tasks

☐ Laborer/Trade Based Occupations Performs work necessitating repetitive operations with their hands physical skill and energy

☐ Technical/Paraprofessional Performs tasks requiring a solid understanding of basic algebra and statistics OR use of heavy equipment

☐ Administrator Performs tasks directly related to the management or general business operations. Exercises discretion and judgment with matters of significance

☐ Managerial/Professional Performs tasks requiring advanced knowledge, which is predominantly intellectual in nature, OR tasks related to the control or administration of part of the organization

☐ Executive/Advanced Professional Performs tasks related to managing the organization or managing a department OR perform work requiring highly advanced knowledge

Education and Experience

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

Recommended Minimum Education for a New Hire

Choose One

Recommended Minimum Experience for a New Hire

Choose One

Licenses and Certifications

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

Required

Preferred

Submit

Source: Evergreen Solutions, 2025



Exhibit 4-3 shows a similar page in which employees are asked to list the Essential Functions of their job. These are the tasks and activities that define the classification and make it unique. Gathering information such as this allows Evergreen to assess the validity of the present classification structure and identify classifications or individuals within classifications that need to be restructured or reclassified.

Exhibit 4-3 Job Functions

View Job Description

Task	Description
<div style="border: 1px solid black; padding: 5px; margin-bottom: 5px;"> Choose One ▼ </div> <div style="border: 1px solid black; padding: 5px;"> <div style="border-bottom: 1px solid black; padding-bottom: 2px;">Choose One</div> <div style="background-color: black; color: white; padding: 2px;">Add task to Job Description</div> <div style="padding: 2px;">Remove task from Job Description</div> <div style="padding: 2px;">Edit task in Job Description</div> </div>	

Source: Evergreen Solutions, 2025

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

Preliminary Assessment

As a starting point for analysis, Evergreen’s project consultants review the client’s database in comparison to the pay plan and information collected from the JATs to produce a preliminary assessment. The preliminary assessment summarizes the strengths and weaknesses of your human resource management system. The compensation analysis focuses on the number of pay grades, range widths, percentage differences between grades, step plans versus open range plans, and the expected time to reach full job competency. The overall analysis focuses on structure, movement, and equity (internal) as well as specific concerns such as turnover, longevity, compression, and range anomalies. The issues we identify in the assessment become core considerations in creating the potential solutions later in the process.

Job Evaluation

The next step in the process is to review responses to the JATs and identify any possible misclassifications. Once the review of the JATs has been completed, Evergreen’s consultants will evaluate all jobs on each of the compensatory factors, score each position, and determine if there is any



	<p>need for further investigation of specific positions. If serious discrepancies exist, Evergreen's consultants will work directly with the Client Project Manager to resolve any issues.</p> <p>Once work has been properly classified, changes in the current classification system rankings can be recommended. Our goal is to produce a classification system that reflects the internal equity relationships suggested by the JAT scoring conducted earlier.</p>
Compensation	<p>Our approach to compensation analysis is based on the belief that compensation should be organization-specific, fair, equitable, and directly tied to strategic goals. To ensure that all these criteria are met, we will conduct an extensive analysis on the relevant labor market, the internal structure and inter-relatedness of jobs within the organization, and the relative worth of jobs within the organization vis-à-vis the compensation philosophy.</p> <p>The most traditional component of a total compensation program is base pay (fixed pay). However, inclusion of benefits in total compensation strategy is not a new concept. Provision of benefits was originally a recruitment tool, though over time the provision of core benefits has become an expectation. Research shows that public sector organizations commonly use superior benefits packages as a way to offset structural disadvantages in base pay. The purpose of the survey is to collect information for comparison to current offerings, and making recommendations for change consistent with the parameters of the organization's compensation philosophy.</p>
Market Salary and Benefits Survey	<p>A key component of assessing compensation is to consider market position, which is sometimes referred to as external equity or competitiveness. Evergreen's consultants wait until well into the classification analysis to design the market survey to ensure that jobs are understood, anomalies in classification characteristics are documented, and sufficient input has been received. The market survey will obtain standard range information related to minimum, midpoint, and maximum salaries. Data collection will focus on the public sector, but will include information from the private sector where applicable. Further, we will look to include any employers to whom the organization has recently lost employees.</p> <p>In addition, a benefits survey will also be administered in tandem with the market survey. Special consideration can be given to select highly competitive, market-driven positions if necessary.</p>
Benchmarks	<p>One of the most important components of the external assessment is in the selection and utilization of benchmark positions for the labor market survey. We will work with the client to identify the appropriate number of benchmark positions to best suit the client's needs in the labor market survey. Based on our experience, we have found that it is simply not practical to survey all positions within the organization—the resulting surveys become too cumbersome for labor market peers to complete, and the response rate on the whole suffers. We ensure, through multiple checks and balances, that the benchmark positions chosen will represent a broad spectrum of</p>



positions across the organization, from all job families, pay levels, and functional areas.

Targets

To conduct an external labor market assessment, we work with the client to identify the most appropriate targets to survey. Evergreen selects peer organizations based on the local labor competition, regional markets, and class-specific markets. Peer organizations should be those organizations that compete with the client for labor in at least one job family. An appropriate mix of peers in the public and private sectors will be included in the survey, and if necessary, augmented with published secondary data sources.

Typically, Evergreen waits until the outreach process has been completed to identify the complete list of market peers. This is because we often will uncover specific information during the focus group and interview sessions that identifies potentially critical survey targets. Ideally, we would like to work with the client after the outreach has been concluded to identify the final list of potential market peers.

An important factor of our methodology is that the client has the final approval of all aspects of the study. We will not proceed with the analysis unless the client is completely comfortable with the survey targets chosen. Often, there are different factors impacting an organization, such as proximity to a major metropolitan area, technology corridor, or specific market (i.e., military base), that have a direct effect on its ability to recruit and retain employees in specific positions. These factors have to be taken into account when selecting survey targets. Once the targets are selected and approved, the survey instrument is developed and sent to the client for final approval. Subsequent to client approval, the survey is then distributed to the targets in both paper and electronic formats.

Evergreen uses a four-fold method of communicating with respondents. Our staff notifies the target group that the survey is being sent or made available, confirms receipt, and encourages participation. Once the data are received, they are cleaned, validated, and summarized. A separate report is issued that shows the results of the salary survey.

Unifying the Solution

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

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



Compensation Administration Guidelines

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

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

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

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

System Maintenance

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

Based on client needs and industry best practices, Evergreen has developed a compensation and classification maintenance tool to assist our clients with implementing, managing, and updating the solutions: **JobForce Manager**. This tool allows our clients to estimate future pay plan changes, update market information, make determinations on reclassifications, and create new jobs. By automating these tasks, **JobForce Manager** allows our clients to not only streamline, but also increase the fairness and transparency of regular compensation and classifications tasks after solution implementation.

Exhibit 4-4 displays the interface from **JobForce Manager** for determining a positions pay grade; additional features include a job scoring tabulation sheet, market survey results database and summary report, pay plan report, and employee salary calculators for modeling fiscal impacts of



compensation changes at the employee level. All data and reports are downloadable and printable, so they can be provided to key decision makers.

**Exhibit 4-4
JobForce Manager Tool**

Department	Class Title ▲	JAT Score	JAT Projected Grade Min	JAT Projected Grade	JAT Projected Grade Max	Market Midpoint	Market Projected Grade	Pay Plan (Select)	Grade (Select)	Assigned Min	Assigned Mid	Assigned Max
Finance	Accounting Manager	525.0	E06	E07	E08	\$93,351.97	E09	Exempt	E10	\$75,599.66	\$96,389.57	\$117,179.48
Finance	Accounts Payable Clerk	300.0	NE05	NE06	NE08			Non-Exempt	NE07	\$29,169.65	\$34,214.08	\$39,258.50
Finance	Accounts Payable Supervisor	443.8	NE15	NE17	NE18	\$72,318.33	NE22	Non-Exempt	NE18	\$49,889.99	\$58,517.68	\$67,145.36
Parks & Recreation	Adaptive Recreation Specialist	400.0	NE12	NE13	NE15			Non-Exempt	NE16	\$45,251.70	\$53,077.26	\$60,902.83
Community Development	Addressing Coordinator	337.5	NE08	NE09	NE10			Non-Exempt	NE18	\$49,889.99	\$58,517.68	\$67,145.36
City Manager's Office	Administrative Assistant	268.8	NE03	NE04	NE05	\$45,432.78	NE13	Non-Exempt	NE12	\$37,228.69	\$43,666.79	\$50,104.90
Community Development	Administrative Assistant	268.8	NE03	NE04	NE05	\$45,432.78	NE13	Non-Exempt	NE12	\$37,228.69	\$43,666.79	\$50,104.90
Engineering	Administrative Assistant	268.8	NE03	NE04	NE05	\$45,432.78	NE13	Non-Exempt	NE12	\$37,228.69	\$43,666.79	\$50,104.90
Legal	Administrative Assistant	268.8	NE03	NE04	NE05	\$45,432.78	NE13	Non-Exempt	NE12	\$37,228.69	\$43,666.79	\$50,104.90
Police	Administrative Assistant	268.8	NE03	NE04	NE05	\$45,432.78	NE13	Non-Exempt	NE12	\$37,228.69	\$43,666.79	\$50,104.90

Source: Evergreen Solutions, 2025

4.2 Detailed Work Plan

The detailed work plan that Evergreen proposes to use to conduct the Compensation and Classification Study for Covington Independent Public Schools (CIPS) is provided in this section. Evergreen understands that CIPS has approximately 700 employees, of which approximately 350 are teachers that will be included in the study.



Task 1.0
Project Initiation

Our work plan consists of the following 11 work tasks:

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

TASK GOALS

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

TASK ACTIVITIES

- 1.1 Discuss with the CIPS Project Manager, and any other key personnel the following objectives:
 - review our proposed methodology, approach, and project work plan to identify any necessary revisions;
 - reach agreement on a schedule for the project including all assignments and project milestones/deliverables; and
 - establish an agreeable communication schedule.
- 1.2 Identify potential challenges and opportunities for the study. Discuss the strategic direction of CIPS and some of the short- and long-term priorities. This activity serves as the basis for assessing where CIPS is going and what type of pay plan will reinforce current and future goals.



**Task 2.0
Evaluate the Current
System**

- 1.3 Obtain relevant materials from CIPS, including:
 - any previous projects, research, evaluations, or other studies that may be relevant to this project;
 - organizational charts for the departments and divisions, along with related responsibility descriptions;
 - current position and classification descriptions, salary schedule(s), benefits information, and classification system.
- 1.4 Review and edit the project work plan and submit a timeline for the completion of each project task.
- 1.5 Provide frequent project updates to the CIPS Project Manager throughout the study.

KEY PROJECT MILESTONES

- Comprehensive project management plan
- Comprehensive database of CIPS staff

TASK GOAL

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

TASK ACTIVITIES

- 2.1 Obtain the existing pay structure and compensation philosophy (if any). Review the existing pay structure and look for potential problems and issues to be resolved.
- 2.2 Identify the strengths and weaknesses of the current pay plans and structures for the CIPS.
- 2.3 Discuss any pay compression issues and provide possible solutions with the CIPS Project Manager.
- 2.4 Complete an assessment of current conditions that details the pros and cons of the current system, taking into account salary and benefits, for CIPS as well as highlights areas for potential improvement in the final adopted solution.

KEY PROJECT MILESTONES

- Review of existing compensation plan(s)
- Assessment of current conditions



Task 3.0
Collect and Review
Current Environment
Data

TASK GOALS

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

TASK ACTIVITIES

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

KEY PROJECT MILESTONES

- Department head/manager interviews
- Employee focus groups and orientation sessions
- JAT/MIT distribution

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

TASK GOALS

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



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

TASK ACTIVITIES

- 4.1 Ensure that all draft class specifications are provided to Evergreen by the CIPS Project Manager.
- 4.2 Review the work performed by each classification and score based on job evaluation. Include an evaluation of supervisory comments.
- 4.3 Review job evaluation scores and identify the classification of positions.
- 4.4 Schedule and conduct additional follow-up with employees for jobs where uncertainty exists over data obtained from job evaluation.
- 4.5 Develop preliminary recommendations for the classification structure and discuss with the CIPS Project Manager. The classification system designed at this point would be based solely on internal equity relationships and would be guided by the job evaluation scores for each classification. Essentially, a structure of classifications would be established, and classifications with similar scoring would be grouped and spacing between jobs would be determined.
- 4.6 Develop recommendations of FLSA (exemption) status and minimum qualifications based on results of the job evaluation (JAT) review and federal requirements.
- 4.7 Review recommendations regarding the classification structure with the CIPS Project Manager.

KEY PROJECT MILESTONES

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

TASK GOALS

- Identify positions for the market salary and benefits survey.
- Identify and develop a comprehensive list of targets for conducting a successful external labor market assessment of salary and benefits.



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

TASK ACTIVITIES

- 5.1 Identify and review the classifications that will be used as benchmarks for the market salary and benefits survey. **Note:** Evergreen will work with the CIPS Project Manager to identify up to 100 classifications that will be used as benchmarks for the salary and benefits survey.
- 5.2 Finalize the list of positions with the CIPS Project Manager.
- 5.3 Develop a preliminary list of organizations for the external labor market survey of salary and benefits, placing a comparative emphasis on characteristics such as:
 - size of the organization;
 - geographic proximity to the Covington area;
 - economic and budget characteristics; and
 - other demographic data.
- 5.4 Review and finalize with the CIPS Project Manager up to 20 peer organizations that should be included in the market salary and benefits survey.
- 5.5 Develop a system for use of secondary data including potential sources and weighting of secondary data, if necessary.
- 5.6 Review survey methodology with the CIPS Project Manager and refine survey methodology prior to distribution of the surveys.
- 5.7 After approval of survey methodology, develop contact list of peer organizations and notify peers of impending surveys.

KEY PROJECT MILESTONES

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

TASK GOALS

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



Task 7.0
Develop Strategic
Positioning
Recommendations

TASK ACTIVITIES

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

KEY PROJECT MILESTONES

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

TASK GOALS

- Determine the compensation philosophy for CIPS.
- Develop a plan for all employees, providing issue areas and preliminary recommendations for strategic improvement.

TASK ACTIVITIES

- 7.1 Identify the accepted compensation philosophy and accompanying thresholds.



Task 8.0
Conduct Solution
Analysis

- 7.2 Using the market salary survey data collected in **Task 6.0**, and the classification data reviewed in **Task 4.0**, determine the proper pay structure and range spread for all CIPS positions.
- 7.3 provide recommendations for updating and/or clarification of placement procedures for new hires and promoted employees.
- 7.4 Produce a revised or new pay scale(s)/structure that best meets the needs of CIPS from an internal and external equity standpoint.

KEY PROJECT MILESTONES

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

TASK GOALS

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

TASK ACTIVITIES

- 8.1 Conduct regression analysis or other appropriate techniques to properly slot each classification into the proposed pay plan for CIPS.
- 8.2 Place all classifications into pay grades based on **Task Activity 8.1**. Sort alphabetically by job class title, in descending order by range, and by old class title and new class specifications.
- 8.3 Create implementation solutions for consideration that take into account the current position of CIPS as well as the findings from the classification and compensation analysis. Identify and prepare a range of compensation policy alternatives.
- 8.4 Discuss with the CIPS Project Manager potential solutions.
- 8.5 Determine the best solution to meet the needs of CIPS in the short-term and long-term.
- 8.6 Document the accepted solution.

KEY PROJECT MILESTONES

- Initial regression analysis
- Potential solutions
- Documented final solution



Task 9.0
Develop and Submit
Draft and Final
Reports

TASK GOALS

- Develop and submit a draft and Final Report of the Compensation and Classification Study to Covington Independent Public Schools.
- Present the Final Report.

TASK ACTIVITIES

- 9.1 Produce a comprehensive draft report that captures the results of each previous step, including a complete listing of the allocation of job classes to salary range requirements. Provide the CIPS Project Manager with a draft final report for review that will include all costs associated with recommendations as well as a phased approach to implementation.
- 9.2 Make edits and submit necessary copies of the Final Report to the CIPS Project Manager.
- 9.3 Present the Final Report.
- 9.4 Develop a communication plan for sharing study results with employees of CIPS.
- 9.5 Develop a plan for maintaining recommendations over time.

KEY PROJECT MILESTONES

- Draft and final reports
- Final presentation
- Communication plan

Task 10.0
Develop
Recommendations
for Compensation
Administration

TASK GOALS

- Develop recommendations for a maintenance program so administration by CIPS staff may sustain the recommended compensation system/structure.
- Conduct training.

TASK ACTIVITIES

- 10.1 Develop recommendations and guidelines for continued administration and maintenance of the classification and compensation system by CIPS staff, including recommendations and guidelines related to:



Task 11.0
Provide Updated
Class Descriptions

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

10.2 Finalize and present recommendations to the CIPS Project Manager for review.

10.3 Provide training and instructional tools to Human Resources Department staff to ensure that staff can conduct individual salary audits/adjustments consistent with study methods until the next formal study is conducted using Evergreen's **JobForce Manager** tool that will enable Human Resources staff to estimate future pay plan changes, update market information, make determinations on reclassifications, and create new jobs – allowing for streamlining, and an increase in fairness and transparency of regular compensation and classification tasks after solution implementation.

KEY PROJECT MILESTONES

- Recommendations for compensation administration
- Training on Evergreen's **JobForce Manager** tool

TASK GOALS

- Update existing class descriptions.
- Create new class descriptions for only those classifications recommended by Evergreen as a result of the job evaluation process.
- Provide final version of all class descriptions/specifications in electronic format (i.e., MS Word).

TASK ACTIVITIES

- 11.1 Assess current class descriptions for form, content, validity, and ADA, FLSA, EEO compliance, etc.
- 11.2 Discuss any necessary changes to the class description format with the CIPS Project Manager.



4.4 Structure and Content of Work Product

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

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

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

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

