

A Proposal to Conduct a
Compensation and Benefits Study
for the Town of Palm Beach, FL
RFP #2018-49

ORIGINAL



Evergreen Solutions, LLC

August 15, 2018

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Submitted to:

Town of Palm Beach
Purchasing Office
951 Okeechobee Road, Suite D
West Palm Beach, Florida 33401

Submitted by:



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August 15, 2018

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APPENDIX: DETAILED RESUMES





Evergreen Solutions, LLC

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August 13, 2018

Town of Palm Beach
Purchasing Office
951 Okeechobee Road, Suite D
West Palm Beach, Florida 33401

To Whom It May Concern:

Evergreen Solutions, LLC is pleased to submit a proposal to conduct a Compensation and Benefits Study for the Town of Palm Beach. Our response is based on our review of your Request for Proposal (RFP #2018-49), our understanding of the Florida labor market, our experience in working with hundreds of local governments and other public sector organizations, including the Town of Palm Beach, and our knowledge of best practices in human resources management.

Evergreen was formed in 2004 and is a limited liability company that is certified as a W/MBE firm in Florida. We provide an innovative and effective option by focusing on clients needing partners and not simply another service provider. Evergreen employs 14 full-time professionals who provide human resources management consulting.

As a national firm, Evergreen Solutions continues to grow and our territory now includes clients in 45 states. In the State of Florida, Evergreen has conducted over 200 compensation and/or benefits studies for local governments and other public sector organizations.

The following is a list of some of the Florida local government clients that our consultant team has worked with, or is currently on contract to work with, that involved services similar in scope to those being requested: **Town of Palm Beach; City of Palm Beach Gardens; Palm Beach County; Village of North Palm Beach; Solid Waste Authority of Palm Beach County; Health Care District of Palm Beach County; Palm Beach County Clerk's Office; City of Dania Beach; City of Sunrise; City of Coral Springs; City of Tamarac; City of North Miami Beach; City of Hollywood; City of Plantation; City of Sunny Isles Beach; City of Key West; City of Holly Hill; City of Cocoa; City of Daytona Beach; City of Orlando; City of Orange City; City of Winter Park; City of Ocala; City of St. Cloud; City of Kissimmee; City of Maitland; City of Lake City; City of Bartow; City of St. Petersburg; City of Dunedin; City of Bunnell; City of Bushnell; City of High Springs; City of Gainesville; City of Fort Walton Beach; City of Ft. Myers; City of North Port; City of Melbourne; City of West Melbourne; City of Sarasota; City of Fort Walton Beach; City of Panama City; City of Panama City Beach; City of Destin; Bay County; Santa Rosa County; Gadsden County; Gulf County; Pinellas County; Lake County; Alachua County; Hernando County; Osceola County; Citrus County; Seminole County; Manatee County; Martin County; Sarasota County; Charlotte County; Monroe County; Highlands County; Miami-Dade County; Flagler County; Town of Jupiter; Town of Cutler Bay; Town of Davie; Town of Longboat Key; Village of Pinecrest; Miami Shores Village; and many others.** A description of the services provided to these clients as well as other similar organizations can be found in **Tab 4** of our proposal.

The Evergreen Team is able to fully comprehend the challenges and goals of the Town of Palm Beach because of our vast understanding of public sector human resources, and the fact that we possess the

necessary experience and expertise. Information regarding our team's qualifications and experience can be found in **Tab 4**. Detailed resumes are included in the **Appendix**.

Some of the human resource services Evergreen has focused on include: compensation and benefits studies; classification studies; performance management studies; recruitment, hiring, and retention studies; strategic and workforce planning; staffing studies; and disparity studies.

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

Evergreen understands that the Town of Palm Beach is seeking an outside consultant to conduct a Compensation and Benefits Study in order to attract and retain high quality employees. The hired consultant will determine the effectiveness of the Town's current compensation and benefits plans and recommend changes that will support the Town's goal of being competitive in the marketplace. We have developed an approach and detailed work plan in **Tab 4** of our proposal that addresses all of the requirements in the scope of work of the RFP.

Some of the key facets of our approach include:

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

As President of Evergreen Solutions, I am authorized to commit our firm contractually to this engagement. We have reviewed your general terms and conditions, and we acknowledge that we would be able to work within your requirements. Our proposal is valid for 180 days upon receipt of proposals.

We would love the opportunity to again work with the Town of Palm Beach and pledge to you our best effort if selected for this study. If you have any questions, please contact me at (850) 383-0111 or via email at linda@consultevergreen.com.

Sincerely,


Dr. Linda Recio, President
Evergreen Solutions, LLC



4.0 Detailed Technical Proposal

Evergreen is well qualified to conduct a Compensation and Benefits Study for the Town of Palm Beach as we have conducted similar studies throughout the country, including over 200 in the State of Florida. In this section we provide our company's qualifications, a list of similar studies we have conducted or are currently on contract to conduct, the qualifications of our proposed project team, our overall approach for completing this study; a detailed work plan—identifying the tasks, activities, and milestones necessary to accomplish the deliverables included in the scope of services of the Request for Proposal (RFP)—and a proposed timeline.

4.1 Evergreen's Qualifications

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

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

Evergreen Solutions is a female-owned business, certified as an M/WBE in many states and municipalities across the country, including Florida.

Our main focus is on people, management, and technology. This focus allows our team to provide a broad variety of services, including, but not limited to: compensation and benefits studies; classification studies; performance appraisal system design; workload analyses; recruitment, hiring, and retention studies; strategic and workforce planning; staffing studies; and labor pool availability.

We invite you to browse our Web site at www.ConsultEvergreen.com or visit us on Facebook at www.facebook.com or LinkedIn at www.linkedin.com for more information about our services, staff, and past experience.



Linked 

Evergreen Solutions assists public sector professionals in exercising control over the inter-related elements that determine success or failure. We do that by applying a situation-responsive discipline that emphasizes:



-
- full visibility into the entire organization through research and discovery;
 - a spirit of partnership with local government staff and leadership;
 - sound recommendations based on best practices and proven methods; and
 - a practical go-forward plan that leads to quantifiable results.

Collectively, the members of the Evergreen Solutions Team have:

- extensive experience in conducting compensation and benefits studies for local governments and other public sector organizations throughout the country, especially in the State of Florida;
- comprehensive experience in all components vital to the successful completion of this project;
- knowledge of relevant Florida statutes and state regulations as well as federal regulations;
- objectivity and flexibility due to the fact that we have no vested interests; and
- specialized analytical tools that we bring to the project.



Clients nationwide have been successfully implementing recommendations from our team of professional consultants for decades. Evergreen has contracted with public sector, quasi-governmental, and non-profit organizations in 45 states throughout the country in providing a variety of human resources consulting.

Exhibit 4-1 includes a list of some of the local government and other public sector clients in the State of Florida that our consultant team has worked with, or is currently on contract to work with, that involved similar services to those being requested.



Exhibit 4-1
Select Florida Public Sector Clients

Florida Sheriff's Association	City of Dunedin	Flagler County
Florida Association of Counties	City of Bartow	Hernando County
Florida League of Cities	City of Holmes Beach	Citrus County
Florida Board of Bar Examiners	City of Ft. Myers	Pinellas County
FL Assoc. of Court Clerks & Comptrollers	City of St. Petersburg	Sarasota County
FL Clerk of Court Operations Corporation	City of Daytona Beach	Martin County
Florida Prepaid Tuition	City of Orange City	Bay County
Association for Institutional Research	City of Pensacola	Gulf County
Confidential Office Personnel Association	City of Plant City	Village of Pinecrest
Manatee County Sheriff's Office	City of Plantation	Village of North Palm Beach
Okaloosa County Sheriff's Office	City of Sarasota	Village of Islamorada
Martin County Sheriff's Office	City of Sunny Isles Beach	Town of Ponce Inlet
Nassau County Sheriff's Office	City of Punta Gorda	Town of Juno Beach
Alachua County Sheriff's Office	City of Deltona	Town of Palm Beach
Clay County Sheriff's Office	City of Temple Terrace	Town of Cutler Bay
Marion County Sheriff's Office	City of Kissimmee	Town of Davie
Collier County Sheriff's Office	City of High Springs	WorkNet Pinellas (a/k/a CareerSource Pinellas)
Pasco County Sheriff's Office	City of Clermont	Sarasota-Manatee Airport Authority
Flagler County Sheriff's Office	City of Orlando	Hillsborough Area Transit Authority
Gadsden County Sheriff's Office	City of North Port	Toho Water Authority
Bay County Sheriff's Office	City of Gainesville	Tampa Bay Water
Walton County Sheriff's Office	City of Key West	Health Care District of Palm Beach County
Monroe County Sheriff's Office	City of Coral Springs	Keys Energy Services
City of Fort Walton Beach	City of Clermont	Orlando-Orange County Expressway Authority
City of Panama City	City of Cocoa	Tampa Housing Authority
City of Destin	City of North Miami Beach	Pinellas County Housing Authority
City of Sebring	City of Dania Beach	Manatee County Utility
City of Winter Park	City of Doral	Manatee County Clerk's Office
City of Palm Beach Gardens	City of Sunrise	Palm Beach County Clerk's Office
City of Bunnell	Manatee County	Hillsborough County Clerk of Court & Comptroller
City of Bushnell	Sumter County	Loxahatchee River District
City of Tallahassee	Seminole County	Southwest Florida Water Management District
City of Ocala	Leon County	St. Johns River Water Management District
City of Venice	Gadsden County	South Florida Water Management District
City of Tamarac	Monroe County	Florida Keys Aqueduct Authority
City of St. Cloud	Charlotte County	Brevard County Property Appraiser's Office
City of Lake City	Osceola County	Gadsden County Property Appraiser's Office
City of Cape Coral	Alachua County	Jacksonville Aviation Authority
City of Largo	Santa Rosa County	Solid Waste Authority of Palm Beach County
City of Hollywood	Palm Beach County	Community Action Stops Abuse
City of Maitland	Miami-Dade County	



4.2 Select Relevant Experience in Florida

Evergreen Solutions has conducted hundreds of classification and compensation studies for local governments and other public sector organizations across the country, especially in the State of Florida. Because of this, we include in this section only a sample of some of Evergreen's more recent work in the State of Florida that involved services similar in scope to the services being requested.

Job Analysis and Position Description Development Town of Palm Beach

Evergreen Solutions was retained by the Town of Palm Beach to conduct an evaluation and update of their classification plan. Employees participated by participating in orientation and focus group meetings, completing Job Assessment Tool (JAT) surveys. Analysis was conducted of these surveys and recommendations were made to improve internal equity and accuracy of the job classification descriptions. After analysis was completed, information from the JAT process was used to update and revise class descriptions appropriately.



Classification and Compensation Study Palm Beach County

Evergreen Solutions is retained by Palm Beach County to conduct a Classification and Compensation Study in order to update the current classification and compensation structure. Evergreen will perform the following tasks:

- conduct a job analysis across the County to ensure job descriptions match the duties performed by the employee;
- provide an analysis of all positions—assigning an appropriate salary grade to ensure fairness and equity—and include recommendations for all positions that are found to be above or below the assigned salary grade; and
- conduct a market compensation analysis of salaries and wages of like or similar jobs of comparable Florida public organizations with similar position and organizational characteristics.



Compensation Study Village of North Palm Beach

Evergreen Solutions was retained to conduct a compensation study for the Village of North Palm Beach. The study included evaluating private and public labor market, and making recommendations to improve competitiveness in alignment with the Village's strategic goals. Evergreen's recommendations improved the competitiveness of the Village and helped prepare it for future recruitment challenges.



Compensation and Classification Study City of Palm Beach Gardens

The City of Palm Beach Gardens hired Evergreen Solutions to conduct a comprehensive Compensation and Classification Study to assess the city's internal and external equity. The City had an established track record of regular studies of this nature and sought up-to-date competitive salary and benefits information from both the private and public sector. A salary survey of peer organizations in the local and regional market, to include benefits and total compensation, was conducted to ascertain the City's relative market position. The City maintained the objective of being among the compensation leaders in Palm Beach County, and regular evaluation of this kind was essential in achieving this progressive goal.

The study included a complete classification analysis using Evergreen Solutions' Job Assessment Tool job valuation methodology in addition to a statistical assessment of current conditions. The study concluded with a series of findings and recommendations in a written report which was designed to identify and recommend resolution of any inequities in the system and, if necessary, update the existing classification structure. The City had gone through a considerable reduction in force, which had caused many responsibilities to be shuffled. Job Assessment Tool analysis allowed those duties to be clarified and classifications to be updated as appropriate.



Compensation and Classification Study (Update) City of Palm Beach Gardens

The City of Palm Beach Gardens again hired Evergreen Solutions to conduct a Compensation and Classification Study to assess the city's internal and external equity. A salary survey of peer organizations in the local and regional market was conducted to ascertain the City's relative market position. The City maintained the objective of being among the compensation leaders in Palm Beach County, and regular evaluation of this kind was essential in achieving this progressive goal.

The study included a complete classification analysis using Evergreen Solutions' Job Assessment Tool job valuation methodology in addition to a statistical assessment of current conditions. The study concluded with a series of findings and recommendations in a written report which was designed to identify and recommend resolution of any inequities in the system and, if necessary, update the existing classification structure.



Employee Compensation Study Solid Waste Authority of Palm Beach County

Evergreen Solutions was engaged with the Solid Waste Authority of Palm Beach County (Authority) to conduct an Employee Compensation Study. Evergreen conducted a market-based review and analysis of the Authority's current compensation and classification structure to test the competitiveness of the salaries offered by the Authority, as compared to public and private employers in local and regional markets and benchmarked to the geographic labor market with which they competed. Evergreen consultants also reviewed existing classification/compensation structure and policies (i.e., method of determining individual salary ranges, calculating pay rates for promotions and demotions, methods for across-the-board pay increases and progression through pay ranges, etc.) to determine what policy revisions were necessary and assigned non-benchmark jobs to the pay structure (those jobs for which there was no data or limited market data) based on the Authority's internal equity. Evergreen reviewed the current administrative and classification maintenance procedures and methods to ensure continued equity in the fairness and competitiveness of the salary plan and recommended modifications and assisted with the development of policy and prepared implementation strategy and cost analysis.

Note: Evergreen continues to provide compensation consulting to the Authority on an as needed basis.



Compensation Analysis Health Care District of Palm Beach County

Evergreen Solutions was retained to conduct an executive compensation analysis for the Palm Beach Health Care District. A salary survey was conducted for similar organizations and current compensation levels were compared.

Note: Previous to this study, Evergreen conducted an Executive Compensation Study for the District.



Compensation and Classification Study Town of Davie

Evergreen Solutions was engaged with the Town of Davie to conduct a Compensation and Classification Study. Evergreen conducted a comparison analysis of all employees within the Town and analyzed the job tasks for each position surveyed by best match and benchmark pay ranges to local public sector markets. Evergreen conducted a review of job classifications for appropriate internal equity and identified functional overlap and efficiencies in departmental structures and relationships. Evergreen further conducted a job task analysis/job audit of all employee positions to



verify and validate information from existing job descriptions and conduct personal interviews with employees, supervisors, and directors, as needed. Evergreen identified and designated all high-risk and/or safety-sensitive classifications and included the appropriate pre-employment screening requirements as mandated by federal, state and local statutes.

Evergreen reviewed existing salaries to determine proper placement within proposed classifications, and recommended appropriate "equity adjustments" as needed. Evergreen determined if classifications were correctly placed in organizational hierarchy and reviewed whether individual positions were classified correctly. In the end, Evergreen provided the Town a recommended classification and compensation structure and a system for maintaining the recommended structure.



Classification and Compensation Study Miami Shores Village

Evergreen was retained by Miami Shores Village to conduct a Classification and Compensation Study for all employees. Employees participated in focus groups, interviews, and a job analysis to determine the best classifications for the work performed. Pay ranges were analyzed in the public and private sector to determine the appropriate pay levels for all included jobs. Recommendations were provided to improve the fairness and equity within the Village.



Compensation and Classification Analysis Village of Pinecrest

Evergreen Solutions was hired by the Village of Pinecrest to conduct Classification Reviews and compensation market analysis utilizing Job Assessment Tool responses and salary survey processes. Evergreen Solutions consultants conducted on-site orientation sessions and focus group meetings where employees were informed of the content of the JAT and coordinated with Village representatives to conduct the JAT in a timely manner. The Village also contributed to a list of benchmark classifications and targeted peer organizations for the external market analysis. At the conclusion of the study the Village was presented with revised and formatted Job Descriptions which reflect up-to-date job tasks and requirements as well as recommendations and implementation strategies for addressing internal and external equity. Each classification was also reviewed for FLSA compliance.



**Employee Compensation Consultant Services
City of Coral Springs**

Evergreen Solutions was engaged with the City of Coral Springs to provide employee compensation consultant services. The purpose and intent of the study was to compare and contrast the City's current salary structure and levels with those of key competing employers and to determine the City's competitive position within the marketplace. Evergreen analyzed each position within the City by conducting interviews and evaluating position descriptions and duties. Evergreen also interviewed department heads and assessed classifications within positions to determine whether classifications need to be revised. Based on the review, Evergreen recommended pay and classification strategies for the City in order to attract and retain talented employees.



**Salary Survey
City of Dania Beach**

Evergreen Solutions was retained by the City of Dania Beach to conduct a salary survey to compare 40 benchmark positions against municipalities of comparable size within the tri-county area, and to make recommendations to improve the competitiveness of the City in recruiting and retaining qualified staff.



**Job Classification and Compensation Study
City of Sunrise**

Evergreen Solutions is engaged with the City of Sunrise to conduct a Job Classification and Compensation Study of its 1,200 employees. The City is at the geographic center of the tri-county metropolitan area comprised of Miami-Dade, Broward and Palm Beach Counties and has a reputation for strong financial management, aggressive economic development, outstanding police and fire rescue services, leadership on regional issues, and support for its public schools.

Evergreen will conduct a comprehensive evaluation of the City's current classification structure and related policies and practices as well as comparative analysis of position classifications to determine relative work within the organization and for the establishment of appropriate pay grades. Evergreen will work with the City to identify the proposed labor market and benchmark classes and public and private agencies/markets that are similarly situated to the City to include in the salary survey. A comprehensive total compensation and benefits survey will be distributed to comparable peers that not only assess job titles but also accounts for actual corresponding job duties and responsibilities.



Evergreen will further conduct interviews with employees in single position classifications, a representative sample of employees in multiple position classifications, and appropriate management personnel in order to validate the information pertaining to job duties. Information will be obtained from employees through the distribution of a job assessment tool Evergreen will use the information obtained from the JAT to perform a job analysis to verify and validate information with existing job descriptions to determine if classifications are correctly allocated in an organizational hierarchy.

In the end, Evergreen will summarize the methodology, techniques, and data used to develop the proposed compensation and classification plan and will provide recommendations for a classification and compensation structure that reflects the City's overall classification and compensation strategies. Evergreen will further recommend pay grades, grade pricing and salary ranges for all existing and proposed classification. **Note:** This project is nearing completion.



Compensation Study City of Hollywood

The City Hollywood retained Evergreen to conduct a compensation study of all non-represented employees and then again for AFSCME employees (i.e., approximately 66 Professional and Supervisory employees in 38 different job classifications). A job-task analysis/job audit was conducted to determine whether classifications were correctly placed in the organizational hierarchy and whether individual job positions were classified correctly. Evergreen reviewed job descriptions using the Job Assessment Tool job valuation methodology and conducted a statistical assessment of current conditions to ensure compliance with federal and state laws including proper designation of classifications as "exempt" vs. "non-exempt". Evergreen conducted a comprehensive survey to ensure that the City of Hollywood's compensation plan was equitable and competitive in its total compensation package relative to internal factors and external markets (The City's goal was to be in the top 25% in salary). Evergreen's consultants reviewed existing salaries to determine proper placement within proposed classifications, and recommend appropriate "equity adjustments" as needed, based upon the results of the salary survey and the recommended pay plan.

Evergreen concluded the study with recommendations designed to alleviate any strains on the current compensation and classification system. Evergreen further recommended procedures, policies, and methods to maintain an on-going Classification & Compensations Plan that was performance based, fair and competitive. In addition, Evergreen's consultants developed policies and procedures for developing and maintaining a career track/progression/retention program and reviewed existing performance appraisal system in order to make recommendations to integrate the performance appraisal system with new Classification & Compensation Plan.



Benchmark Compensation Study City of Plantation

Evergreen Solutions was retained by the City of Plantation to conduct a Benchmark Compensation Study and develop a city-wide compensation plan for the City, taking into account internal and external equity. Evergreen developed recommendations and guidelines for the continued administration and maintenance of the compensation structure, including recommendations and guidelines related to how employees will move through the pay structure/system as a result of transfers, promotions, demotions and employees whose base pay is at the maximum of their pay range in their positions; including proposal for the proper mix of pay, how often to adjust pay scales and survey the market, and how to keep the system fair and competitive over time.



Pay and Classification Study City of Doral

Evergreen Solutions was engaged with the City of Doral to conduct a Pay and Classification Study. Employees participated in focus groups, interviews, and a job analysis was conducted to determine the best classifications for the work performed. In addition, salaries were analyzed in the public and private sector to determine the appropriate salary for all included jobs. Recommendations were provided to improve the fairness and equity in the current classification and compensation system. **Note:** Evergreen was also hired in 2007 to conduct a Compensation, Classification, and Value Engineering Study.



Compensation Study City of North Miami Beach

Evergreen Solutions was retained by the City of North Miami Beach to conduct a compensation study. Evergreen consultants reviewed pay ranges in the public and private sector to determine the appropriate pay levels for all included jobs (up to 60 benchmarks). Recommendations were provided to improve the fairness and equity within the City. Evergreen provided City staff with the necessary training and materials so that an understanding of the methodology—and how to implement, administer, and maintain the recommended compensation system—was accomplished.



Classification and Compensation Study City of Sunny Isles Beach

Evergreen Solutions was retained by the City of Sunny Isles Beach to conduct a classification and compensation study for all its employees. Employees participated in focus groups, interviews, and a job analysis was conducted to determine the best classifications for the work performed. Pay ranges were analyzed in the public and private sector to determine the appropriate pay levels for all included jobs and recommendations were provided to improve the fairness and equity in the current system.



Classification and Compensation Study City of Lake City

Evergreen Solutions was retained by the City of Lake City to conduct a Classification and Compensation Study. Evergreen's consultants reviewed the City's current classification and compensation plan and identified and recommended a consistent and competitive market position that the City could strive to maintain based on a salary survey results from peer organizations. Evergreen recommended an appropriate salary range for each position in the City based on a review and analysis of the classification plan, the compensation survey results, internal relationships, and external and internal equity. Evergreen further provided recommendations for the ongoing internal administration and maintenance of the proposed compensation and classification plan.



Salary and Benefits Survey City of St. Cloud

Evergreen Solutions was retained by the City of St. Cloud to conduct a Salary and Benefits Survey. Evergreen's consultants reviewed the effectiveness of the City's current salary and benefits plan as it related to the market competitiveness for attracting and retaining quality employees. Pay ranges were analyzed in the public and private sector to determine the appropriate pay levels for all included jobs and recommendations were provided to improve the fairness and equity in the current system.

Previously Evergreen was hired to conduct a Compensation and Classification Study for the City.



Classification, Compensation and Other Related Services Study City of Maitland

Evergreen Solutions was retained by the City of Maitland to conduct a comprehensive evaluation of their compensation and classification plans and practices. Employees participated in the project by attending focus groups, participating in interviews, and completing Job Assessment Tool surveys to determine the accuracy and equity of the classification plan. In addition, pay ranges were analyzed in the public and private sector to determine the competitiveness of the City's pay plan for all included jobs. Recommendations were provided to improve the accuracy, fairness and equity of the overall plan.



Salary Survey and Job Analysis on Selected Positions City of Kissimmee

Evergreen Solutions was hired last year by the City of Kissimmee to conduct a Salary Survey as well as a Job Analysis on selected positions (i.e., Police and Fire). The intent of the study was to compare and contrast the City's current salary structure and levels with those of key competing employers so that a determination could be made regarding the City's competitive position within the marketplace.

Note: Evergreen also conducted a Salary, Benefits, and Classification Study for the City.



Classification and Compensation Job Classification Analysis City of St. Petersburg

Evergreen Solutions was retained by the City of St. Petersburg to conduct a Job Classification Analysis in order to update and produce approximately 648 legally-compliant job descriptions that would include 6 – 8 core competencies each. Evergreen's consultants: analyzed all city job descriptions, both full-time and part-time positions, and determined the core competencies for each classification; and revised classifications and competencies that formed the foundation of the City's recruitment, learning management, performance management, and succession planning programs.

Evergreen met with HR staff and department heads to discuss roles, competency model options, and project processes and adjusted the competency survey that was used in conjunction with the Job Assessment Tool (JAT) that was administered to a representative sample of the City's 3,150 full- and part-time staff. Evergreen



reviewed the work performed by each classification and scored and reviewed supervisory comments for any anomalies or discrepancies discovered. Evergreen created task inventory and job families based on JAT responses and organizational charts and identified the degree of overlap in tasks between jobs in similar job families. From this, Evergreen identified root factors in each task grouping and linked to any underlying behavioral factors.



Classification and Compensation Services City of Dunedin

Evergreen Solutions was engaged with the City of Dunedin to provide and Classification and Compensation Services. Evergreen analyzed each position within the City by conducting interviews; evaluating employee position descriptions and duties; interviewing department heads; assessing classifications within positions; and making FLSA determinations. Evergreen presented a proposed classification structure to City management, including a cost analysis for positions that would require adjustments. Evergreen also conducted a comprehensive survey of public and private labor market comparables designed to include salary ranges, and actual salaries to ensure that the City's compensation was equitable and competitive relative to internal factors and external markets.



Classification and Compensation Study City of Cocoa

Evergreen Solutions was hired by the City of Cocoa, located in Brevard County, to conduct a Classification and Compensation Study for its 444 employees. Evergreen's consultants performed a comprehensive survey of the City's job classifications, pay structures and benefits and provided recommendations to the City for implementation of the proposed changes in order for the City to maintain internal and external equity. The City's objectives for the study was: to attract and retain qualified workers who will be paid an equitable salary and benefit package; provide fair salaries for all workers of the City; and provide a salary structure that enables the City to maintain a competitive position with other cities and companies within the same geographic area.

The City's current Pay and Classification Plan consisted of four different classifications:

- General Employees: The current pay structure is set up in pay grades with steps (varying in numbers, up to 16 steps).



- Laborers' International Union of North America (LIUNA): These positions consist of 16 different pay grades with established minimum and maximum pay ranges.
- Coastal Florida Police Benevolent Association (PBA): These positions consist of three (3) different pay grades with established minimum and maximum pay ranges.
- International Association of Firefighters (IAFF): These positions consist of two different pay grades with established minimum and maximum pay ranges.



Human Resource Consulting Services (Compensation Study) City of Orlando

Evergreen was retained by the City of Orlando to provide human resources consulting services by conducting a compensation study. Evergreen reviewed the City's compensation system, selected targets and benchmarks for market comparison, conducted a market survey, and developed strategic positioning recommendations to keep the City's compensation plan competitive.



Compensation Analysis City of Orange City

Evergreen Solutions was engaged with the City of Orange City to conduct a Compensation Analysis. Evergreen's consultants estimated the City's market position, refined pay plan, and slotted incumbents based on data that was collected from the region.



Classification and Compensation Study City of Winter Park

Evergreen Solutions assisted the City of Winter Park's Human Resources Department with conducting a comprehensive classification and compensation study for all full-time employees. The project centered on providing the City with a revised system that was characterized by internal and external equity. To ensure internal equity, Evergreen utilized its Job Assessment Tool (JAT) and Management Issues Tool (MIT) to properly classify work performed and highlight issues to be addressed by management. Employees at all levels were also provided a forum to voice



concerns with the current system through focus groups. Evergreen also selected benchmarks and peer organizations to survey for wages in comparison to the market. This information was combined with the job analysis to provide a comprehensive solution. The recommended solutions were costed out and presented to the City for review.



Compensation and Classification Study City of North Port

Evergreen Solutions was retained by the City of North Port to conduct a Compensation and Classification Study by performing a market study to assess the City's existing compensation and classification plan. The goals for the study were to:

- assess the current compensation and classification structure;
- identify and address internal compensation inequities and recommend adjustments to job titles to better fit assigned duties where necessary;
- review job families/hierarchies throughout the organization;
- support a market-driven compensation plan and system that is designed to incentivize, recognize and retain its employees;
- recommend changes to pay plan and classification structure;
- review the total compensation package (salary plus benefits);
- recommend how to implement tools and techniques to support an ongoing reclassification process that will enable the organization to maintain its competitive place in the market; and
- provide findings and recommendations in a comprehensive report.



Classification and Compensation Study City of Ft. Myers

Evergreen Solutions was retained by the City of Ft. Myers to conduct a Classification and Compensation Study for all employee groups (i.e., Police Union – Sworn only; Fire Union and General Union and Non-bargaining). The study included a comprehensive classification analysis using Evergreen Solutions' Job Assessment Tool job valuation methodology in addition to a statistical assessment of current conditions. An evaluation of external equity including a salary survey of competing organizations was conducted. The project concluded with a series of findings and recommendations designed to identify and recommend resolution of any inequities in the system and, if necessary, redesign the existing system in place for the City.



Classification and Compensation Study City of Sarasota

Evergreen Solutions was retained by the City of Sarasota to conduct a classification and compensation analysis of its workforce. Employees participated in focus groups, interviews, and a job analysis was conducted to determine the best classifications for the work performed. In addition, pay ranges were analyzed in the public and private sector to determine the appropriate pay levels for all included jobs. Recommendations were provided to improve the fairness and equity in the current system.



Pay and Classification Study City of Fort Walton Beach

Evergreen Solutions was hired by the City of Fort Walton Beach to conduct a Pay and Classification Study for its 320 employees. Evergreen conducted a job-task analysis/job audit of all employee positions to verify and validate information from existing job descriptions and conducted personal interviews with employees, supervisors, and directors to determine whether classifications were correctly placed in organizational hierarchy and if individual positions were classified correctly.

Evergreen conducted a comprehensive survey of public and private labor market comparables designed to include salary ranges, actual salaries, and benefits information to ensure the City of Fort Walton Beach's compensation was equitable and competitive in its total compensation package relative to internal factors and external markets. Evergreen conducted a comparison of existing benefits with market data and comment.



Evergreen recommended and implemented a classification system that could be utilized by City staff at the conclusion of the project. To accomplish this Evergreen's consultants:

- grouped positions based upon duties performed, knowledge, skills and abilities for the position;
- conducted an analysis that addressed the issue of internal equity;
- recommended the assignment of each classification to a pay grade;
- reviewed current job descriptions and revised/updated as necessary;
- reviewed the City's current assignment of exempt versus non-exempt status as it related to the FLSA and made appropriate recommendations with justification; and
- provided appropriate adjustments to account for regional cost of living variations.



Comprehensive Classification and Compensation Study City of Panama City

Evergreen was retained by the City of Panama City to conduct a Comprehensive Classification and Compensation Study for 545 non-union positions/employees, including approximately 79 firefighters, 92 police officers, and 5 elected officials in 190 job classifications. Employees participated in focus groups, interviews, and a job analysis to determine the best classifications for the work performed. Pay ranges were analyzed in the public and private sector to determine the appropriate pay levels for all included jobs. Evergreen reviewed the City's current performance evaluation system, tools and procedures, and made recommendations for necessary changes to the system. Recommendations were also provided to improve fairness and equity of all jobs within the City. Select City staff were provided the necessary training and materials so that an understanding of the methodology and how to implement, administer, and maintain the recommended total classification and compensation system were accomplished. Evergreen made recommendations regarding enhancements to the City's current performance evaluation system and provided the City with a performance evaluation tool.



Comprehensive Classification and Compensation Study City of Panama City Beach

Evergreen Solutions was hired by the City of Panama City Beach to conduct a Comprehensive Classification and Compensation Study by reviewing job descriptions, position classification schedules, pay plans, and compensation programs for approximately 255 non-union City employees. Evergreen presented a methodology that accurately and fairly measured compensable factors, allowed proper and equitable cross comparisons of compensable factors for classes, and minimized the appearance of possible prejudices on the part of the City administration.

In the end, Evergreen provided written procedures for maintaining pay plans, reviewed general practices, and made recommendations for improvements to the current classification and compensation structure based upon the results of the market and benefit survey and the classification analysis. Further, Evergreen designed and recommended an implementation plan for the updated compensation strategy with the lowest impact to both the minimum and maximum points of the updated pay plan and the greatest gain to positions that fell outside of the updated and designated range. Evergreen also recommended administrative procedures to maintain fairness and competitiveness of the position classification and compensation plan after implementation and recommended final pay schedules with projected costs based on a range of alternative implementation plans.



Compensation Study City of Panama City Beach

Evergreen Solutions was again hired by the City of Panama City Beach to conduct a Compensation Study. Evergreen will collect relevant data; identify up to 15 targets and 30 classifications for a market salary survey; develop and conduct a salary survey and analyze results; review up to 10 job descriptions for possible reclassification; provide recommendations for updates/changes to the pay plan, including implementation options, based on market survey results; and prepare and deliver a draft and final report.



Classification and Compensation Study City of Destin

Evergreen Solutions was hired by the City of Destin to conduct a Classification and Compensation Study. Evergreen's consultants evaluated jobs, updated job classifications, assessed the labor market for competitiveness, and made recommendations for changes to the current classification and compensation structure. Evergreen's recommendations improved the competitiveness of the City and assisted the City in attracting and retaining the best and brightest employees.



Compensation and Classification Study Services Monroe County

Evergreen was retained by Monroe County to conduct a Compensation and Classification Study for 265 non-union employees in 178 classifications as well as 124 union employees in 46 classifications who are represented by the Teamsters bargaining unit. Employees participated in focus groups, interviews, and a job analysis to determine the best classifications for the work performed. Evergreen's consultants compared the County's positions to other similar positions within other County departments to determine the relative value of each position to every other position in the County. Comparisons were made with regard to the actual work being performed and based on the current job description. In addition, positions were compared to other similar positions in other private and public sector organizations throughout the Florida Keys and South Florida. Characteristics such as size of the organization, geographic proximity, economic and budget characteristics, and other appropriate demographic data were taken into consideration when making comparisons. Evergreen's consultants analyzed pay ranges in the public and private sector to determine the appropriate pay and benefit levels for all included jobs.

Recommendations were provided to improve fairness and equity of all jobs within the County. Select County staff were provided the necessary training and materials so that an understanding of the methodology and how to implement, administer, and maintain the recommended total classification and compensation system could be accomplished.

Note: Evergreen was again hired by Monroe County in September of 2016 to implement a minimum Living Wage of \$31,200 year/\$15.00 an hour (This included a determination of issues that arose with supervisory duties or compression of positions; what needed to be done to fix those issues; cost for County implementation with variable options; and publication of analysis). In addition, Evergreen is currently updating the County's compensation and classification plan.



Classification and Compensation Study Pinellas County

Evergreen Solutions was retained by Pinellas County to conduct a comprehensive classification and compensation study that included recommendations and suggestions for an implementation and maintenance process that effectively provided the County with the resources and expertise to further enhance its classification and compensation program. A comprehensive job classification and pay study hadn't been conducted since 2004 so the County believed it was important to invest in a study that would look at both internal and external equity.

The objective of the study was to have a credible classification and compensation plan that: allowed positions performing similar work with similar levels of complexity, responsibility, and knowledge, skills



and abilities to be classified appropriately; identified salaries for assigned duties; outlined promotional opportunities and possible compensation growth; identified pay differential between individual classifications; and identified relevant labor markets.



Compensation, Classification, and Performance Management Study Manatee County

Evergreen Solutions was hired by Manatee County to assist with a county-wide Compensation and Classification Study. At the time of the study, Manatee County was a growing county with a population of over 300,000 located on the southwestern coast of FL between Pinellas and Sarasota Counties. An appointed County Administrator oversaw 16 departments, with approximately 2,900 employees within approximately 600 classifications and 58 pay ranges/grades.

The study included all employees that serve in capacities for the Board of County Commissioners. As part of the review, orientation sessions, focus groups, and interviews were conducted in throughout the county. All employees were asked to complete the Job Assessment Tool (JAT) and job analysis was conducted with the results in order to create a classification plan. A salary survey was issued to local and regional employers to assess competitiveness. Based on the classification and compensation findings, a new pay plan as well as policies and procedures were recommended to the County. Evergreen Solutions helped the County attain their goal of maintaining a sound process providing a classification and pay structure that is fair, equitable, and systematic with a compensation plan comparable with other governmental jurisdictions and the private sector. In addition, Evergreen reviewed the performance management system in place within the County, and provided recommendations for improvement.

Note: Evergreen completed a market survey and compensation analysis update and also conducted a Compensation and Classification study of the Information Technology Services Department.



Compensation Study Sarasota County

Evergreen Solutions was retained by Sarasota County to conduct a Compensation Study. Pay ranges were analyzed in the public and private sector to determine the appropriate pay levels for all included jobs. Recommendations were provided to improve the fairness and equity in the current system.



Compensation and Benefits Study Seminole County

The Evergreen Solutions Team was hired by Seminole County to assist with a county-wide Compensation and Benefits Study. The study included employees who served in various capacities for the Board of County Commissioners. As part of the review, orientation sessions, focus groups, and interviews were conducted throughout the county. All employees were asked to complete the Job Assessment Tool (JAT) and job analysis was conducted with the results in order to create a classification plan. A salary survey was issued to local and regional employers to assess competitiveness. Based on the classification and compensation findings, a new pay plan as well as policies and procedures were recommended to the County.

Note: Evergreen also conducted two other projects for Seminole County (i.e., Compensation and Classification Study and a Performance Evaluation Study).



Compensation Study Lake County

Evergreen Solutions was retained by Lake County to conduct and furnish a comprehensive compensation survey for Lake County government itself, and for select positions at Lake Emergency Medical Services, Inc. Evergreen made recommendations for improvements and modifications to the current compensation and overall pay structure, including number of pay grades, and appropriate pay ranges (minimum, maximum, percentage between grades, etc.). The recommendations also included appropriate salary ranges and midpoints for each job classification and recommendations for ranges that lagged, matched, or led the relevant labor market. Evergreen surveyed the relevant labor market for merit pay practices being used and recommended pay administration practices to include consideration of merit pay, alternative reward strategies, including non-monetary rewards and cost savings/efficiency incentives as may be suitable.



Compensation Study Osceola County

Evergreen Solutions was retained by Osceola County to review its compensation system and structure for areas of improvement. The Evergreen team examined current pay plan's organization, market responsiveness, and adaptability. A detailed report was prepared to that summarized findings and recommendations for improvement.



Salary and Benefits Review Hernando County

Evergreen Solutions was retained by Hernando County to conduct a Salary and Benefits Review of its workforce. Evergreen's consultants reviewed the effectiveness of the County's current salary and benefits plan as it related to the market competitiveness for attracting and retaining quality employees. To accomplish this, Evergreen conducted a comprehensive survey of public and private labor market comparables designed to include salary ranges, pay grade factoring system, actual salaries, and benefits (retirement plans, health and dental insurance) information to ensure the County's compensation was equitable and competitive in its total compensation package relative to internal factors and external markets for substantially similar classifications.

Evergreen also conducted a job-task analysis/job audit of all 766 employee positions to verify and validate information from existing job descriptions. Personal interviews with employees, supervisors, and directors were conducted to determine whether classifications were correctly placed in organizational hierarchy and whether individual positions were classified correctly. Pay ranges were analyzed in the public and private sector to determine the appropriate pay levels for all included jobs and recommendations were provided to improve the fairness and equity in the current system.



Classification and Compensation Study Charlotte County

Evergreen Solutions was retained by Charlotte County to conduct a classification and compensation study for approximately 900 full-time and part-time employees in 250 classification specifications. Employees participated in focus groups, interviews, and a job analysis was conducted to determine the best classifications for the work performed. A review of all current classification specifications and job descriptions was made to ensure consistency, compliance with current industry best practices as to form, and compliance with applicable provisions of the Fair Labor Standards Act (FLSA), ADA, PERC (Florida Statute 447.203), and other applicable State and federal laws.

A salary survey was conducted within the appropriate public and private job markets to determine current market pay grade assignment and salary structure commensurate with the job assignment. Evergreen offered criteria for a candidate's or an employee's placement within corresponding zones of the pay range. Recommendations were made for resolving pay compression issues that had been created due to 5 - 6 years of wage freezes compounded by ever-increasing market competitiveness. **Note:** Prior to this study, Evergreen was hired in 2011 by the County to conduct a Market Salary Survey.



Salary Study Highlands County

Evergreen Solutions was retained by Highlands County to conduct a Salary Study for its workforce. The primary goal of the study was to ensure that the County maintained a sound process that provided a classification and pay structure that was fair, equitable, and systematic with a compensation plan that was comparable with other governmental jurisdictions as well as the private sector. The County desired a pay program that was fair, equitable, and competitive with both public and private employers in the surrounding geographic market area from which the County recruited, and was supportive of the County's compensation philosophy to be competitive with area markets in order to attract, motivate, and retain quality employees.

Evergreen's consultants evaluated current pay grades (i.e., number of pay grades, including additions, deletions, and/or consolidations) and recommended a strategy for improvements. Evergreen further developed a classification system that facilitated ongoing compensation analysis and reporting and was based on similarly-situated employees, similar skills, qualifications, responsibilities, and pay, using job family groupings and EEO job categories that comported with EEOC guidelines for government employers. Evergreen reviewed position titles (including supervisory/management) and recommended a titling structure which defined consistent levels of responsibility across the County.



Pay and Classification Study Bay County

Evergreen Solutions was engaged with Bay County to conduct a Pay and Classification study. A job analysis was conducted using existing job descriptions to determine the best classifications for the work performed. In addition, a salary survey was conducted in the public sector to determine the appropriate pay ranges for 30 benchmarked positions. Recommendations were provided to improve the fairness and equity in the current classification and compensation system.



Compensation Study Santa Rosa County

Evergreen Solutions is retained by Santa Rosa County to conduct a Comprehensive Compensation Study. The study will include the following tasks:

- establish criteria for the selection of survey participants;
- conduct salary survey prepare an analysis based on the results;



- establish equitable salary ranges to provide for the recruitment and retention of qualified staff, equitable relationships of one job to another within the organization, and address compression/equity issues between pay grades and classifications;
- evaluate existing compensation policies and propose any recommended changes; and
- prepare and deliver the final report to the County Commission.

Note: This project is nearing completion.



Pay and Classification Study Gulf County

Evergreen Solutions was engaged with Gulf County to conduct a Pay and Classification Study for its workforce. Evergreen analyzed each position within the County by conducting interviews; evaluating employee position descriptions and duties; interviewing department heads; and assessing classifications within positions. In addition, Evergreen reviewed current job descriptions, focusing on the purpose, job scope, essential duties and responsibilities, education/training requirements, physical job requirements, and working conditions, and determined FLSA status (exempt/non-exempt) for positions under federal regulations. Based on this review, Evergreen presented a proposed classification structure to County management, including a cost analysis for positions that required adjustments.

Evergreen also conducted a comprehensive survey of public and private labor market comparables designed to include salary ranges, and actual salaries to ensure that Gulf County's compensation was equitable and competitive in its total compensation package relative to internal factors and external markets.



Compensation and Classification Study Alachua County

Evergreen Solutions was engaged with Alachua County to conduct a Compensation and Classification Study of jobs under the Board of County Commissioners, the Sheriff, Tax Collector, Property Appraiser, Supervisor of Elections, and the Library District. Specifically, the County desired the following services to be performed by Evergreen:

- develop and administer a job analysis questionnaire for the purpose of having employees state their job duties and qualifications including education, experience, licenses and certificates; working conditions (physical and environmental) and all other pertinent information;
- prepare and present to the Board of County Commissioners a report documenting the results of the job analysis by



classification and recommendations concerning a classification structure and pay adjustments;

- allocate each employee with regard to the new classification structure;
- identify benchmark classifications to be used to determine appropriate markets for salary survey purposes, as well as to determine the position of the county with regard to salaries for comparable jobs in appropriate markets;
- administer a salary survey for the purpose of recommending appropriate salaries based on external (market) and internal (equity) considerations;
- recommend a salary structure, including the number of pay grades, and pay ranges;
- recommend salaries for each classification, as well as recommended salaries for each employee;
- provide a classification maintenance plan;
- provide guidelines and procedures for administering the resulting classification plan to include the following: Initial placement in the salary range and means for movement through the range; and
- train HR and departmental staff on the methodology and maintenance of the recommended classification and pay plan.



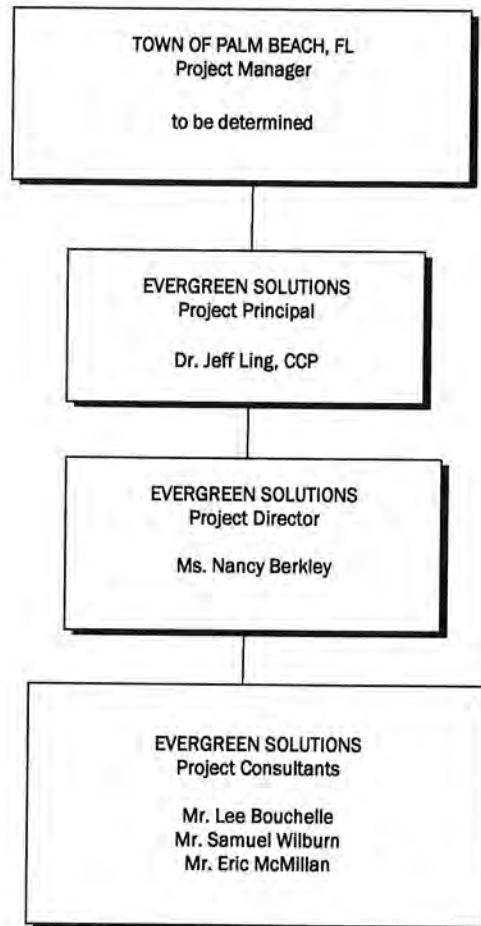
4.3 Proposed Project Team

In this section we provide you with the qualifications of our proposed project team. Detailed resumes are included in the **Appendix**.

Exhibit 4-2 shows our proposed project management organization and personnel assignments. The structure has been designed to clearly define the roles and responsibilities of each part of the Compensation and Benefits Study for the Town of Palm Beach so that there will be no confusion as to who is responsible for any aspect of this engagement.



**Exhibit 4-2
Proposed Project
Management
Organization and
Personnel
Assignments**



Town of Palm Beach Project Manager. With each project engagement, we work with the client to identify one specific point of contact to serve as a Project Manager. The Town's Project Manager will be our reference point throughout the engagement. We will take project direction, leadership, and guidance from the Town's Project Manager and all project deliverables will be filtered through the Town's Project Manager throughout the duration of the project.

Evergreen Solutions Project Principal. Our Project Principal will have ultimate accountability for the success of this project. Evergreen Solutions' Project Principal is always a senior leader in our firm, most often a Vice President or higher. The Project Principal will have contractual authority over the contract, and will be our top level of project responsibility.

Evergreen Solutions Project Director. Evergreen designates a Project Director for each HR consulting project. The Project Director will work with the Project Principal regarding the scheduling of the project with the Town's Project Manager. The Project Director will have the most frequent contact with the Town and will assign project activities to the Project Consultants, and will ensure that deliverables are met within specified timelines.



Evergreen Solutions Project Consultants. Our Project Consultants are a team of consultants who have worked together on numerous projects, and who will provide consulting and analytical work on all project activities. The Project Consultants will review compensation and benefits plans and policies, collect the data for the market salary and benefits survey, and prepare draft materials for the Project Principal and Project Director to review.

Consultant Team Members must be thoroughly knowledgeable in the portion of the project they are responsible for, as well as have expertise in the issues that are unique to each individual client. Evergreen is proposing an exceptional team of consultants who have worked together on many similar projects. Evergreen Solutions always makes sure each project is sufficiently staffed to handle any additional tasks or unforeseen issues that may arise during the course of the study. The combination of our individual knowledge and skills form a superior team who will be able to competently perform all of the pieces of the Compensation and Benefits Study for the Town of Palm Beach.

Key Staff

In this section we provide you with the qualifications of each member of our proposed project team.

Project Principal Dr. Jeff Ling, CCP

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

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

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

Dr. Ling has been instrumental in creating, reviewing, and evaluating the methodology employed by Evergreen Solutions on all human resource engagements. His background and skill set make him uniquely qualified for assessing organizational critical needs and



strategy. He is also an expert in policy development and long-term planning.

A sample of the types of studies Dr. Ling has been involved with include:

- Classification/Compensation– He developed the methodology and techniques for organizations to employee for successful data collection and implementation based on internal and external equity needs. He has been the Project Principal for numerous projects related to compensation and/or classification. Some of the public sector clients that he has worked with, or is currently on contract to work with, include: Town of Palm Beach, FL; City of Palm Beach Gardens, FL; Village of North Palm Beach, FL; Palm Beach County Clerk's Office, FL; Health Care District of Palm Beach County, FL; Solid Waste Authority of Palm Beach County, FL; City of Sunrise, FL; City of Winter Park, FL; City of Clermont, FL; City of Hollywood, FL; City of North Port, FL; City of Orlando, FL; City of Sunrise, FL; City of Coral Springs, FL; City of Key West, FL; City of Bushnell, FL; City of Sarasota, FL; City of Tamarac, FL; Town of Jupiter, FL; Town of Cutler Bay, FL; Town of Davie, FL; Miami Shores Village, FL; Village of Pinecrest, FL; City of Fort Walton Beach, FL; City of Panama City, FL; City Panama City Beach, FL; City of Destin, FL; City of St. Petersburg, FL; City of Dunedin, FL; City of Gainesville, FL; City of High Springs, FL; City of Holly Hill, FL; City of Ocala, FL; City of Kissimmee, FL; City of Lake City, FL; City of Plant City, FL; City of Orange City, FL; City of Ft. Myers, FL; City of Cape Coral, FL; City of Dania Beach, FL; City of Melbourne, FL; City of St. Cloud, FL; City of Daytona Beach, FL; City of Cocoa, FL; City of Bartow, FL; Bay County, FL; Santa Rosa County, FL; Gadsden County, FL; Pinellas County, FL; Alachua County, FL; Manatee County, FL; Charlotte County, FL; Monroe County, FL; Osceola County, FL; Miami-Dade County, FL; Palm Beach County, FL; Seminole County, FL; Hernando County, FL; Sarasota County, FL; Forsyth County, GA; Lumpkin County, GA; Douglas County, GA; Cherokee County, GA; City of Kingsland, GA; City of Alpharetta, GA; City of Douglasville, GA; City of Roswell, GA; City of Brookhaven, GA; City of Savannah, GA; City of Fayetteville, GA; City of Dunwoody, GA; City of Stockbridge, GA; City of Dublin, GA; Sedgwick County, KS; City of Bloomington, IN; City of Branson, MO; City of Lee's Summit, MO; Clay County, MO; Jefferson County, MO; St. Charles County, MO; City of Pittsburg, PA; County of Montgomery, PA; County of Allegheny, PA; Mahoning County, OH; Blount County, TN; City of Albany, OR; City of Austin, TX; City of Pearland, TX; City of Sunset Valley, TX; City of Rowlett, TX; City of Seguin, TX; Denton County, TX; Travis County, TX; Ft. Bend County, TX; Denton County, TX; City of Santa Fe, NM; City of Carlsbad, NM; City of Page, AZ; Town of Sahuarita AZ; Gloucester County, VA; Prince George County, VA; Surry County, VA; Essex County, VA; James



City County, VA; County of Culpeper, VA; Isle of Wight County, VA; City of Fredericksburg, VA; City of Williamsburg, VA; City of Suffolk, VA; Spotsylvania County, VA; Loudoun County, VA; King George County, VA; Gaston County NC; Guilford County, NC; Buncombe County, NC; Union County, NC; Berkeley County, SC; Charleston County, SC; City of Columbia, SC; City of Lancaster, SC; City of Mauldin, SC; City of Chester, SC; Town of Mount Pleasant, SC; Town of Hilton Head Island, SC; Town of Moncks Corner, SC; Tri-County Council for Southern Maryland; Allegany County, MD; Washington County, MD; City of Westminster, MD; City of Annapolis, MD; City of Hyattsville, MD; and many others.

- Performance Evaluation – He has provided the framework for many organizations transitioning into goal based performance evaluation systems or fully functional merit-based pay structures. He understands the importance of a well stratified, objective based review process and has been instrumental in assisting a number of large organizations transition from traditional systems into merit-based pay structures with minimal transitional costs and interruption. Some of the public organizations he has provided these services to include, but are not limited to, the following: City of Cape Coral, FL; City of Hollywood, FL; Seminole County, FL; Manatee County, FL; Brunswick County, NC; City of Lee's Summit, MO; and City of Mont Belvieu, TX.
- Market Research – He provided the basis for which market research was collected, analyzed, and review. He ensured that data collection procedures and methods were statistically reliable using his knowledge of statistics and overall market research.
- Policy Development – He has a thorough and firm understanding of policy development and has assisted many clients with implementing tailored policies and practices that reflect best practices.

Dr. Ling holds a Doctorate's Degree from Florida State University in Political Science and has taught courses addressing research methodology, statistical analysis, technological innovations, and political economy at various universities.

Project Director
Ms. Nancy Berkley

Ms. Berkley is a Manager at Evergreen Solutions who has over 30 years human resources experience demonstrating a thorough knowledge of multiple HR disciplines including, recruiting and staffing, workforce planning and retention, on-boarding, compensation and benefits, employee and labor relations, employee leave administration, voluntary and in-voluntary employee separations, performance management, employee surveys, organizational design and development, organization effectiveness, employee learning, training, and development, employee records administration and



retention, and awards and recognition programs. She has consistently enhanced organizational capability by integrating HR with strategic business planning, development and assessment. She has provided individualized executive coaching and led HR team development and high performance teams. She has led corporate change initiatives and built talent-rich organizations by strengthening people and integrating processes and has directed human resources in high-volume, transactional service organizations and high-level, consulting organizations. She has excellent conflict resolution, negotiation, and influencing skills.

Ms. Berkley possesses expertise in the following HR areas:

- Designing and implementing a shared service, centralized virtual staffing organization, increasing efficiency of staffing function for hiring managers.
- Analyzing and responding to employee relation trends—positively influenced work environments reducing employee complaints by ~90 percent.
- Consulting with senior leaders and successfully leading project teams to develop new policies, programs and tools—including total revision and communication of a company's HR policies and practices to be in accordance with state and federal laws;
- Creating HR metrics reviews utilizing business goals and human resources information systems data—set improvement goals and developed action plans for unique business requirements.
- Conceptualizing and implementing complex workforce reduction plans—then redeployed ~50 percent of the affected employees.
- Representing companies in state and federal agency reviews, e.g. Office of Federal Contract Compliance Program (OFCCP) reviews—Equal Employment Opportunity Commission (EEOC) charges, workers compensation charges, and unemployment compensation claims.

Recent public sector projects that Ms. Berkley has directed or served on the Evergreen Team include: ; a Compensation Study for the Village of North Palm Beach, FL; a Compensation Study for the City of Hollywood, FL; a Salary Survey for the City of Dania Beach, FL; a Classification, Compensation, and Benefits Study for the Town of Jupiter, FL; a Compensation and Classification Study for Miami Shores Village, FL; a Pay and Classification Study for the City of Fort Walton Beach, FL; a Comprehensive Compensation and Classification Study for the City of Panama City, FL; a Comprehensive Compensation and Classification Study for the City of Panama City Beach, FL; a Compensation Plan Update for the City of Panama City Beach, FL; a Classification and Compensation Study for the City of Destin, FL; a Classification and Compensation Study for the Town of Cutler Bay, FL;



Job Audits for the City of Gainesville, FL; a Compensation Study for Lake County, FL; a Performance Evaluation Study for Lake County, FL; Compensation Consulting Services for the Town of Longboat Key, FL; Collection and Analysis of Market Data for the Confidential Office Personnel Association, FL; a Salary Plan Update for the Flagler County Sheriff's Office, FL; a Classification and Compensation Study for Pasco County Sheriff's Office, FL; a Pay Plan Market Value Study for the Florida Board of Bar Examiners; a Compensation and Classification Study for Highlands County, FL; a Compensation and Classification Study for the City of North Port, FL; Compensation and Classification Study Services for Monroe County, FL; a Compensation and Classification Study for Highlands County, FL; a Pay and Classification Study for Martin County, FL; a Compensation and Classification Study for Alachua County, FL; a Position and Compensation Study for the Florida Keys Aqueduct Authority; a Pay and Classification Study for the Florida Keys Aqueduct Authority; FLSA Audits for the Southwest Florida Water Management District; FLSA Audits and Salary Survey for the South Florida Water Management District; a Compensation and Benefits Study and Analysis for the City of Dahlgonega, GA; a Compensation Analysis for the City of Alpharetta, GA; Employee Classification and Compensation Study for the City of Savannah, GA; Comprehensive Classification and Compensation Study for the City of Garden City, GA; a Compensation and Classification Study for the City of Brookhaven, GA; a Comprehensive Compensation and Classification Study for the City of Tybee Island, GA; a Pay and Classification Study for the City of Chamblee, GA; a Pay and Classification Study for the City of Fayetteville, GA; a Wages and Salaries Compensation Study the City of Stockbridge, GA; a Compensation and Classification Study and Analysis for the City of Dublin, GA; a Classification and Compensation Study and Analysis for the City of Villa Rica, GA; a Classification and Compensation Study and Analysis for the City of Douglasville, GA; a Salary Survey for the City of Dunwoody, GA; a Compensation Study for the City of Statesboro; a Salary and Benefits Survey for the City of Roswell, GA; a Compensation and Benefits Survey for Forsyth County, GA; a Classification and Compensation Study and Analysis for Douglas County, GA; a Job Description/Classification Study and Analysis for Douglasville-Douglas County Water and Sewer Authority, GA; a Classification and Compensation Study for Lumpkin County, GA; a Classification and Compensation Study for Berkeley County, SC; a Comprehensive Classification, Compensation, Performance Management, and Benefits Study for the City of Columbia, SC; a Classification and Compensation Study for the City of Goose Creek, SC; Classification and Compensation Plan Review for the City of Annapolis, MD; a Wages and Salary Scale Study for Washington County, MD; a Classification and Compensation Study for Gloucester County, VA; a Compensation Study for King George County, VA; a Pay and Classification Study for the Isle of Wight County, VA; a Classification and Compensation Study for Essex County, VA; a Compensation and Classification Study for Montgomery County, VA; a Classification and Compensation Study for Alleghany County and the City of Covington, VA; a Pay and Classification Study for the City of Williamsburg, VA; a Salary Scale Study for Loudoun County Public Schools, VA; a Salary Equity Study for Guilford County, NC; a Position Classification and Compensation Study for Gaston County, NC; a Classification and Compensation Study and Benefits Survey for New



Hanover County and New Hanover ABC Board, NC; a Performance Management Review for Morehead State University, KY; a Classification and Compensation Study for Sedgwick County, KS; a Classification and Compensation Study for Jefferson County, MO; a Classification and Compensation Study for Blount County, TN; a Classification Study and a Compensation Survey for the City of Page, AZ; a Classification and Compensation Study for the Town of Little Elm, TX; a Human Resources Department Assessment for the City of Buda, TX; a Classification and Compensation Study for the City of Pflugerville, TX; a Comprehensive Compensation and Classification Study for the City of Farmers Branch, TX; and a Comprehensive Compensation and Benefits Study for the City of Rowlett, TX.

Ms. Berkley has a Bachelor's Degree in Psychology from Florida State University and was certified as SPHR from 1997 to 2012.

**Project Consultant
Mr. Lee Bouchelle**

Mr. Bouchelle is a Consultant at Evergreen Solutions. He has a strong background in Applied Labor Economics and quantitative analysis, which provides him with the ability to provide knowledge on a variety of public sector Human Resource studies. His research and data analysis skills at Evergreen have focused on human resource analysis, such as studying the internal equity of employee compensation and classification for public sector clients as well as comparing client practices to peers in the labor market. He is proficient in a variety of qualitative and quantitative tools necessary to complete the studies.

Recent public sector projects for Evergreen in which Mr. Bouchelle has been involved include: a Classification and Compensation Study for the City of Delray Beach, FL; a Job Classification and Compensation Study for the City of Sunrise, FL; a Classification and Compensation Study for the City of Destin, FL; a Compensation Study for the Walton County Sheriff's Office, FL; a Job Classification and Compensation Study for the City of Melbourne, FL; a Classification and Compensation Study for the City of High Springs, FL; a Compensation and Classification Study for the City of North Port, FL; a Pay and Classification Study for the City of Holly Hill, FL; Compensation Consulting Services for the Town of Longboat Key, FL; FLSA Audits for the Southwest Florida Water Management District; a Classification and Compensation Study for Gadsden County, FL; a Compensation and Classification Study for Alachua County, FL; a Pay and Classification Study for Monroe County, FL; a Compensation Plan Update for the City of Garden City, GA; a Classification and Compensation Study and Analysis for Douglas County, GA; a Classification and Compensation Study for Lumpkin County, GA; and an Employee Classification and Compensation Study for the City of Savannah, GA; a Pay and Classification Study for the City of Chamblee, GA; a Classification and Compensation Study for Alleghany County and the City of Covington, VA; a Classification and Compensation Study for the City of Fredericksburg, VA; a Pay and Classification for the City of Williamsburg, VA; a Pay and Classification Study for the District 19 Community Services Board, VA; Classification and



Compensation Plan Review for the City of Annapolis, MD; a Wages and Salary Scale Study for Washington County, MD; a Position Classification and Compensation Study for Gaston County, NC; a Classification and Compensation Study for Berkeley County, SC; a Classification and Compensation Study for Dorchester County, SC; a Pay and Classification Study for the Town of Moncks Corner, SC; a Compensation Update for the Central Ohio Transit Authority; an Employee Classification and Compensation Study for Blount County, TN; a Classification and Compensation Study for Jefferson County, MO; a Compensation and Classification Study for Clay County, MO; a Human Resources Department Assessment for the City of Buda, TX; a Classification and Compensation Study for the City of Athens, TX; a Comprehensive Compensation and Classification Study for the City of Farmers Branch, TX; and a Classification Study and a Compensation Survey for the City of Page, AZ.

Prior to joining Evergreen Solutions, Mr. Bouchelle was a Consultant at ERS Group, where he was involved in the development of large and complex economic and statistical research projects which analyzed the effects of various business practices or economic programs. He also participated in data analytics projects that sought to identify fraud, waste, and abuse in the healthcare industry and state income tax filings. In addition, he prepared OFCCP compliant Affirmative Action Plans, evaluated AAP software for statistical accuracy, and estimated economic damages from various events.

Mr. Bouchelle has a Master's Degree in Resource Economics and a Bachelor's Degree in Political Science/International Relations both from the University of Florida.

**Project Consultant
Mr. Samuel Wilburn**

Mr. Wilburn is a Consultant with Evergreen. He is a former engineer who possesses a strong background in qualitative and quantitative analysis at the professional level. He is able to apply his knowledge and skills as a Consultant for Evergreen through various functions including: conducting market research and collecting compensation data, utilizing job assessment tools to analyze different job classifications, running regression analyses and recommending appropriate pay grades, editing job descriptions, and preparing performance evaluation files. He is also responsible for developing and maintaining project solution files which comprise of multiple alternatives geared toward bringing salaries to more market-competitive levels and their total cost estimates for implementation. In addition, he assists in preparing presentations and research reports for clients.

Recent Projects that Mr. Wilburn has been involved with include: a Classification and Compensation Study for the City of Conroe, TX; an Employee Evaluation System for the North Charleston Sewer District, SC; a Pay and Classification Study for Buncombe County, NC; Classification and Compensation Study Services for the City of



**Project Consultant
Mr. Eric McMillan**

Westminster, MD; a Classification and Compensation Study and Analysis for the City of Douglasville, GA; a Compensation and Classification Study and Analysis for the City of Dublin, GA; a Pay and Classification Study for the City of Fayetteville, GA; a Wages and Salaries Compensation Study for the City of Stockbridge, GA; a Compensation and Benefits Study for Cherokee County, GA; a Pay and Classification Study for the Florida Keys Aqueduct Authority; a Classification and Compensation Study and Analysis for the City of Villa Rica, GA; a Salary Survey for the City of Dunwoody, GA; and a Salary Survey for the School Board of Sarasota County, FL.

Mr. Wilburn has an MBA with emphasis in Human Resources and a Bachelor's of Science dual degree in Civil and Environmental Engineering from Florida State University. He also holds a Building Contractor's license in the State of Florida.

Mr. McMillan is a Senior Analyst at Evergreen Solutions. His background has been in the study of financial reporting, data analysis, and market research using techniques in accounting, analytics, and research. This allows him to communicate and engage with clients through data and design.

Mr. McMillan's role with Evergreen has focused on compensation and classification studies utilizing market data. His primary responsibilities include:

- working closely with project teams and project managers in coordinating salary and benefit survey initiatives;
- evaluating market data from surveys, government agencies, and private sector databases to provide comprehensive reviews of compensation packages; and
- designing clear and concise reports and displays to communicate nuanced results.

Recent public sector projects that Mr. McMillan has been involved with include: a Compensation Plan Update for the City of Panama City Beach, FL; a Classification and Compensation Study for the City of Delray Beach, FL; a Classification and Compensation Study for Pasco County Sheriff's Office, FL; Compensation Consulting Services for the Town of Longboat Key, FL; a Compensation Plan Update and Performance Evaluation Study for Lake County, FL; a Compensation and Classification Study for the City of North Port, FL; FLSA Audits for the Southwest Florida Water Management District; a Pay and Classification Study for the City of Chamblee, GA; a Comprehensive Classification and Compensation Study for the City of Garden City, GA; a Wages and Salaries Compensation Study for the City of Stockbridge, GA; a Pay and Classification Study for the City of Fayetteville, GA; a Salary Survey for the City of Dunwoody, GA; a Compensation and Classification Study and Analysis for the City of Dublin, GA; a Classification and Compensation Study for Lumpkin County, GA; a



Classification and Compensation Study and Analysis for Douglas County, GA; a Compensation and Benefits Study for Cherokee County, GA; a Job Description/Classification Study and Analysis for Douglasville-Douglas County Water and Sewer Authority, GA; a Classification and Compensation Study for Blount County, TN; a Classification and Compensation Study for Alleghany County and the City of Covington, VA; a Pay and Classification Study for the District 19 Community Services Board, VA; a Pay and Classification Study for the City of Williamsburg, VA; a Classification and Compensation Study for the City of Fredericksburg, VA; a Compensation Study for King George County, VA; a Classification and Compensation Plan Review for the City of Annapolis, MD; Wages and Salary Scale Study for Washington County, MD; a Position Classification and Compensation Study for Gaston County, NC; a Compensation and Classification Study for Union County, NC; a Pay and Classification Study for the Town of Moncks Corner, SC; a Classification and Compensation Study for the City of Goose Creek, SC; a Classification and Compensation Study for Berkeley County, SC; a Human Resources Department Assessment for the City of Buda, TX; a Comprehensive Compensation and Classification Study for the City of Farmers Branch, TX; a Classification Study and a Compensation Survey for the City of Page, AZ; and a Classification and Compensation Study for Jefferson County, MO.

Mr. McMillan holds a Bachelor Degree in Accounting and Marketing from Florida State University and is working toward a Master's Degree in Human Resources.



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

4.4 Evergreen's Approach

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

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



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

We will work closely with the Town's designated Project Manager and the Human Resources Department, and the Town Council 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 Solutions will work with you to balance your need to meet your performance goals while carefully managing the organization's resources.

Compensation management has undergone significant transformation in the private sector and over time public sector organizations have mirrored these changes. While compensation once centered on the separate administration of base pay and core benefits, a shift has occurred that has transformed compensation management. Progressive organizations now recognize that to effectively recruit, reward, motivate, and retain employees, compensation management requires strategic thinking and planning.

Compensation management must support an organization's overall strategic direction. To accomplish this, effective organizations design a compensation philosophy that spells out 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 Solutions realizes that we will need to tailor our approach to fit the operating, fiscal, and competitive needs of the organization. Recommendations must always reflect competitive needs while supporting the organization's overall mission.

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

Kick Off Meeting

Evergreen Solutions begins each engagement by meeting with our client's leadership team as well as the person designated as the Project Manager for the client. 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 compensation and benefits data;



	<ul style="list-style-type: none"> • identifying additional data needs; and • developing preliminary schedules for subsequent tasks. <p>We will also request a copy of the employee database that reflects current classification and compensation data.</p>
Communication Plan	<p>Communication is a critical component of any compensation and benefits study. Communicating with select 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. Regular updates will be provided to the client's Project Manager and can be posted on the client's intranet site, if desired. Additionally, the communication plan for the distribution of the end product, particularly how the results will be distributed to employees, is also critical.</p>
Developing the Compensation Philosophy	<p>An organization's compensation philosophy is designed to support the overall business strategy. It can take many forms, but ultimately the compensation philosophy selected will guide the structure of the overall compensation system. Evergreen Solutions will meet with the client's leadership team to ascertain the organization's overall business strategy and document the various alternatives that are available to support that strategy. Based on the client's needs, Evergreen Solutions will provide the client with a comprehensive compensation philosophy to guide subsequent decisions. Typically, a consultant can facilitate the process and make recommendations for the compensation philosophy, but the decision will ultimately rest with the organization itself. It is imperative for the client to agree upon a compensation philosophy prior to establishing the remaining components of the compensation system.</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 compensation philosophy.</p>
Market and Benefits Surveys	<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</p>



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.

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.

Benchmarks

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 fit their needs in the labor market survey. Based on our experience, we have found that it is simply not practical to survey all positions within the organization– the resulting surveys become too cumbersome for labor market peers to complete, and the response rate on the whole suffers. We ensure, through multiple checks and balances, that the benchmark positions chosen will represent a broad spectrum of positions across the organization, from all job families, pay levels, and functional areas.

Targets

To conduct an external labor market assessment, we work with the organization to identify the most appropriate targets to survey. Evergreen Solutions 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. Peers in the public sectors will be included in the survey, and if necessary, augmented with published secondary data sources.

Typically, Evergreen Solutions 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.



Compensation Administration Guidelines

Evergreen Solutions 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.

In order for clients to maintain the recommended compensation system, Evergreen Solutions 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.

4.5 Detailed Work Plan

Evergreen has provided a detailed work plan to conduct the Compensation and Benefits Study for the Town of Palm Beach in this section.

Our work plan consists of the following eight tasks:

- Task 1: Project Initiation
- Task 2: Evaluate the Current System
- Task 3: Identify List of Market Survey Benchmarks and Approved List of Targets
- Task 4: Conduct Market Survey and Provide External Assessment Summary
- Task 5: Conduct a Benefits Survey
- Task 6: Develop Strategic Positioning Recommendations
- Task 7: Develop and Submit Draft and Final Reports
- Task 8: Develop Recommendations for Compensation Administration



Task 1.0
Project Initiation

TASK GOALS

- Finalize the project plan with the Town of Palm Beach (Town).
- Gather all pertinent data.
- Finalize any remaining contractual negotiations.
- Establish an agreeable final time line for all project milestones and deliverables.

TASK ACTIVITIES

- 1.1 Meet with the Town's Project Manager to discuss the following objectives:
- understand the mission and current compensation philosophy for the Town;
 - identify and specific concerns with respect to the development of a compensation plan;
 - review our proposed methodology, approach, and project work plan to identify any necessary revisions and to assess any concerns;
 - reach agreement on a schedule for the project including all assignments and project milestones/deliverables; and
 - establish an agreeable communication schedule.
- 1.2 Identify potential challenges and opportunities for the study. Discuss the strategic direction of the Town and some of the short- and long-term priorities. This activity serves as the basis for assessing where the Town is going and what type of pay plan will reinforce current and future goals.
- 1.3 Obtain relevant materials, 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 and salary schedule(s);
 - benefits plans; and
 - policies and procedures.



**Task 2.0
Evaluate the
Current System**

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

KEY PROJECT MILESTONES

- Comprehensive project management plan
- Comprehensive database of Town employees

TASK GOAL

- Conduct a comprehensive preliminary evaluation of the existing compensation plan for of the Town of Palm Beach.

TASK ACTIVITIES

- 2.1 Obtain the existing pay structure and compensation philosophy for the Town. Look for potential problems and issues to be resolved.
- 2.2 Determine the strengths and weaknesses of the current pay plans for the Town and review current pay grades and identify any pay compression issues that need to be addresses.
- 2.3 Review compensation policies and procedures and discuss any changes that need to be made.
- 2.4 Complete an assessment of current conditions that details the pros and cons of the current system for the Town 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
Identify List of
Market Salary
Benchmarks and
Approved List of
Targets**

TASK GOALS

- Identify the proper benchmark positions for the external labor market assessment.
- Identify and develop a comprehensive list of targets for conducting a successful external labor market assessment.

TASK ACTIVITIES

- 3.1 Identify the list of classifications (benchmarks) to include in the labor market assessment. **Note:** Evergreen will work with the Town's Project Manager to select up to 60 classifications to use and benchmarks for the salary survey.



**Task 4.0
Conduct Market
Survey and Provide
External
Assessment
Summary**

- 3.2 Finalize the list of positions with the Town's Project Manager.
- 3.3 For each employee group review with the Town's Project Manager up to 20 peer organizations to use as targets for the salary and benefits survey.
- 3.4 Develop a preliminary list of organizations for the external labor market survey, placing a comparative emphasis on characteristics such as:
 - size of the organization;
 - geographic proximity to the West Palm Beach area;
 - economic and budget characteristics; and
 - other demographic data.
- 3.5 Develop a list of survey targets by employee group. Develop a system for use of secondary data including potential sources and weighting of secondary data, if necessary.
- 3.6 Review survey methodology with the Town's Project Manager and refine survey methodology prior to distribution of survey.
- 3.7 After approval of survey methodology, develop contact list of peer organizations and notify peers of impending survey.

KEY PROJECT MILESTONES

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

TASK GOALS

- Conduct the external labor market salary survey.
- Provide a summary of the survey results to the Town's Project Manager for review.

TASK ACTIVITIES

- 4.1 Prepare a customized external labor market salary survey for the Town Project Manager's approval. Discuss questions and categories for the market survey.



**Task 5.0
Conduct a Benefits
Survey**

- 4.2 Contact the targets for electronic completion of the survey. Provide paper copies by fax, if requested.
- 4.3 Conduct necessary follow-up through e-mails, faxes, and phone calls.
- 4.4 Collect and enter survey results into Evergreen's electronic data analysis tools.
- 4.5 Validate all data submitted.
- 4.6 Develop summary report of external labor market assessment results.
- 4.7 Submit summary report (i.e., executive summary) of the external labor market assessment results that identifies whether the Town is in alignment, above, or below the market to the Town's Project Manager.

KEY PROJECT MILESTONES

- Market survey instrument
- Summary report of external labor market assessment results

TASK GOALS

- Conduct an external labor market benefits survey.
- Provide a summary of the benefits survey results to the Town's Project Manager for review.

TASK ACTIVITIES

- 5.1 Develop a listing of the benefits (i.e., defined benefit and hybrid pension plans, deferred compensation plans 401(a), 457, executive benefits, employee contributions, vesting, and other elements associated with employee retirement benefit plans, provided by the Town that will be compared to competitive employers. **Note:** Evergreen will evaluate all benefits for general and public safety employees separately.
- 5.2 Evergreen will evaluate Group Insurance (i.e., medical, Rx, dental, vision including premiums, cost sharing, and coverage levels for each, Ancillary insurance (life, LTD, AD&D, etc.) FSA, HSAs, executive insurance benefits, health risk assessments, disease management programs, and other elements associated with employee group insurance plans) as compared to competitive employers.



**Task 6.0
Develop Strategic
Positioning
Recommendations**

- 5.3 Evergreen will evaluate Employee Leave Benefits such as vacation, sick, PTO, holidays, purchase or conversion plans, payouts upon separation/retirement, bereavement, etc., as compared to competitive employers.
- 5.4 Evergreen will further evaluate other pay practices such as cell phone stipends, educational assistance, degree recognition, specialty assignment stipends, certification incentives, mentoring/career counseling, work related travel reimbursement and per diem, etc., as compared to competitive employers.
- 5.5 Prepare benefits survey to be included with salary survey developed in **Task 4.0**.
- 5.6 Conduct a survey of benefits in use by competitive employers, to include both private and public employers, and make recommendations regarding the benefits which the Town might competitively employ in its market.
- 5.7 Submit benefits survey to the Town's Project Manager for review.
- 5.8 Revise benefits survey.
- 5.9 Distribute benefits survey in conjunction with salary survey.
- 5.10 Develop summary report of external labor market benefits results.
- 5.11 Submit summary report (i.e., executive summary) of external labor market benefits results to the Town's Project Manager. The summary report will include details regarding: agencies surveyed; position salary range surveyed; retirement and other benefits surveyed; benefits where the Town is in alignment, above, or below the market and the rationale for the same; and ranking of each benefit for all agencies surveyed.

KEY PROJECT MILESTONES:

- Catalogue of existing Town benefits
- Benefits survey instrument
- Summary report of external labor market benefits results

TASK GOALS

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



**Task 7.0
Develop and
Submit Draft and
Final Reports**

TASK ACTIVITIES

- 6.1 Identify the compensation philosophy and accompanying thresholds.
- 6.2 Using the market salary and benefits data collected in **Tasks 4.0 and 5.0**, determine the proper pay plans, including number of grades, steps, and ranges for the Town's employees.
- 6.3 Identify highly competitive positions within the Town and customize recommendations for compensation where required.
- 6.4 Produce pay plans that best meet the needs of the Town from an external equity standpoint.

KEY PROJECT MILESTONES

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

TASK GOALS

- Develop and submit a draft and final report of the Compensation and Benefits Study to the Town of Palm Beach.
- Present the final report.

TASK ACTIVITIES

- 7.1 Produce a comprehensive draft report that captures the results of each previous step. **Note:** The draft report will include the costs associated with the implementation of the recommended compensation plan. The report will also include an executive summary that includes the study's methodology, assumptions, and results, separating general employee data from public safety data, where applicable.
- 7.2 Submit the comprehensive draft report to the Town's Project Manager for review and approval.
- 7.3 Make edits and submit necessary copies of the final report.
- 7.4 Present the final report to Town management and the Town Council.
- 7.5 Develop a communication plan for sharing study results with employees.



**Task 8.0
Develop
Recommendations
for Compensation
Administration**

- 7.6 Develop implementation database to communicate the process and progress of this project to the Town's Project Manager.
- 7.7 Develop a plan for maintaining recommendations over time.

KEY PROJECT MILESTONES

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

TASK GOAL

- Develop recommendations for the continued administration by Town staff to sustain the recommended compensation plan.

TASK ACTIVITIES

- 8.1 Develop recommendations and guidelines for the continued administration and maintenance of the compensation plan, including recommendations and guidelines related to:
- how employees will move through the pay structure/system as a result of transfers, promotions, or demotions;
 - how to pay employees whose base pay has reached the maximum of their pay range or value of their position;
 - the proper mix of pay;
 - 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.
- 8.2 Recommend recruitment/retention strategies, where appropriate.
- 8.3 Present recommendations to the Town's Project Manager for review.

KEY PROJECT MILESTONES

- Recommendations for compensation administration
- Recommendations for recruitment/retention policies



4.6 Proposed Timeline

Evergreen Solutions possesses the ability, staff, skills, and tools to conduct the Compensation and Benefits Study for the Town of Palm Beach in three months of the project start date and following the signing of the contract. This is based on a tentative start date of October 1, 2018, and a completion date of December 30, 2018.

This project timeline can be modified in any way to best meet the needs of the Town of Palm Beach.



5.0 *Financial Information*

Evergreen possesses the financial and fiscal stability to undertake this engagement for the Town of Palm Beach. Evergreen has continued to experience steady financial growth over the years even in spite of the market's current economic instability. We continue to invest in the financial stability of the firm to ensure that our overall financial health can be maintained in periods of economic uncertainty. As such, our firm has never incurred any debts and has never borrowed against our line of credit. We continue to maintain a healthy 20 percent reserve to be able to address any potential fiscal issues that may arise.

We have attached a copy of our most recent tax return to demonstrate our financial stability.



Form **1065**Department of the Treasury
Internal Revenue Service

U.S. Return of Partnership Income

For calendar year 2017, or tax year beginning

, ending

OMB No. 1545-0123

2017Go to www.irs.gov/Form1065 for instructions and the latest information.

A Principal business activity CONSULTING	Type or Print	Name of partnership EVERGREEN SOLUTIONS, LLC	D Employer identification number **-***3438
B Principal product or service CONSULTING		Number, street, and room or suite no. If a P.O. box, see the instructions. 2878 REMINGTON GREEN CIRCLE	E Date business started 07/01/2005
C Business code number 541600		City or town, state or province, country, and ZIP or foreign postal code TALLAHASSEE FL 32308	F Total assets (see the instructions) \$ 266,237

- G** Check applicable boxes: (1) ☐ Initial return (2) ☐ Final return (3) ☐ Name change (4) ☐ Address change (5) ☐ Amended return (6) ☐ Technical termination - also check (1) or (2)
- H** Check accounting method: (1) ☒ Cash (2) ☐ Accrual (3) ☐ Other (specify) ▶
- I** Number of Schedules K-1. Attach one for each person who was a partner at any time during the tax year ▶ **2**
- J** Check if Schedules C and M-3 are attached ☐

Caution. Include only trade or business income and expenses on lines 1a through 22 below. See the instructions for more information.

Income	1a Gross receipts or sales	1a	2,389,864	
	b Returns and allowances	1b		
	c Balance. Subtract line 1b from line 1a			1c 2,389,864
	2 Cost of goods sold (attach Form 1125-A)			2
	3 Gross profit. Subtract line 2 from line 1c			3 2,389,864
	4 Ordinary income (loss) from other partnerships, estates, and trusts (attach statement)			4
	5 Net farm profit (loss) (attach Schedule F (Form 1040))			5
	6 Net gain (loss) from Form 4797, Part II, line 17 (attach Form 4797)			6
7 Other income (loss) (attach statement)			7	
8 Total income (loss). Combine lines 3 through 7			8 2,389,864	
Deductions (see the instructions for limitations)	9 Salaries and wages (other than to partners) (less employment credits)			9 671,926
	10 Guaranteed payments to partners			10 637,682
	11 Repairs and maintenance			11 1,242
	12 Bad debts			12
	13 Rent			13 70,995
	14 Taxes and licenses			14 55,384
	15 Interest			15
	16a Depreciation (if required, attach Form 4562)	16a		
	b Less depreciation reported on Form 1125-A and elsewhere on return	16b		16c
	17 Depletion (Do not deduct oil and gas depletion.)			17
	18 Retirement plans, etc.			18 44,533
	19 Employee benefit programs			19 59,111
	20 Other deductions (attach statement)		SEE STATEMENT 1	20 478,067
	21 Total deductions. Add the amounts shown in the far right column for lines 9 through 20			21 2,018,940
22 Ordinary business income (loss). Subtract line 21 from line 8			22 370,924	

Sign Here

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than partner or limited liability company member) is based on all information of which preparer has any knowledge.

Signature of partner or limited liability company member

Date

May the IRS discuss this return with the preparer shown below (see instructions)? ☒ Yes ☐ No**COPY**

Paid Preparer Use Only	Print/Type preparer's name GREGORY J. COCHRAN	Preparer's signature <i>Gregory J. Cochran, CPA</i>	Date 3-30-18	Check <input type="checkbox"/> if self-employed	PTIN *****
	Firm's name ▶ THOMSON BROCK LUGER & COMPANY	Firm's EIN ▶ ** - ***9573			
	Firm's address ▶ 3375G CAPITAL CIR NE TALLAHASSEE, FL 32308-3736	Phone no. 850-385-7444			

For Paperwork Reduction Act Notice, see separate instructions.

Form **1065** (2017)

Schedule B Other Information

1 What type of entity is filing this return? Check the applicable box:

- a ☐ Domestic general partnership b ☐ Domestic limited partnership
 c ☒ Domestic limited liability company d ☐ Domestic limited liability partnership
 e ☐ Foreign partnership f ☐ Other ▶

Yes	No

2 At any time during the tax year, was any partner in the partnership a disregarded entity, a partnership (including an entity treated as a partnership), a trust, an S corporation, an estate (other than an estate of a deceased partner), or a nominee or similar person?

X

3 At the end of the tax year:

a Did any foreign or domestic corporation, partnership (including any entity treated as a partnership), trust, or tax-exempt organization, or any foreign government own, directly or indirectly, an interest of 50% or more in the profit, loss, or capital of the partnership? For rules of constructive ownership, see instructions. If "Yes," attach Schedule B-1, Information on Partners Owning 50% or More of the Partnership

X

b Did any individual or estate own, directly or indirectly, an interest of 50% or more in the profit, loss, or capital of the partnership? For rules of constructive ownership, see instructions. If "Yes," attach Schedule B-1, Information on Partners Owning 50% or More of the Partnership

X

4 At the end of the tax year, did the partnership:

a Own directly 20% or more, or own, directly or indirectly, 50% or more of the total voting power of all classes of stock entitled to vote of any foreign or domestic corporation? For rules of constructive ownership, see instructions. If "Yes," complete (i) through (iv) below

X

(i) Name of Corporation

(ii) Employer Identification Number (if any)

(iii) Country of Incorporation

(iv) Percentage Owned in Voting Stock

b Own directly an interest of 20% or more, or own, directly or indirectly, an interest of 50% or more in the profit, loss, or capital in any foreign or domestic partnership (including an entity treated as a partnership) or in the beneficial interest of a trust? For rules of constructive ownership, see instructions. If "Yes," complete (i) through (v) below

X

(i) Name of Entity

(ii) Employer Identification Number (if any)

(iii) Type of Entity

(iv) Country of Organization

(v) Maximum Percentage Owned in Profit, Loss, or Capital

5 Did the partnership file Form 8893, Election of Partnership Level Tax Treatment, or an election statement under section 6231(a)(1)(B)(ii) for partnership-level tax treatment, that is in effect for this tax year? See Form 8893 for more details

Yes	No
	X

6 Does the partnership satisfy all four of the following conditions?

- a The partnership's total receipts for the tax year were less than \$250,000.
 b The partnership's total assets at the end of the tax year were less than \$1 million.
 c Schedules K-1 are filed with the return and furnished to the partners on or before the due date (including extensions) for the partnership return.
 d The partnership is not filing and is not required to file Schedule M-3
 If "Yes," the partnership is not required to complete Schedules L, M-1, and M-2; Item F on page 1 of Form 1065; or Item L on Schedule K-1.

Yes	No
	X

7 Is this partnership a publicly traded partnership as defined in section 469(k)(2)?

X

8 During the tax year, did the partnership have any debt that was cancelled, was forgiven, or had the terms modified so as to reduce the principal amount of the debt?

X

9 Has this partnership filed, or is it required to file, Form 8918, Material Advisor Disclosure Statement, to provide information on any reportable transaction?

X

10 At any time during calendar year 2017, did the partnership have an interest in or a signature or other authority over a financial account in a foreign country (such as a bank account, securities account, or other financial account)? See the instructions for exceptions and filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR). If "Yes," enter the name of the foreign country. ▶

X

Schedule B Other Information (continued)

	Yes	No
11 At any time during the tax year, did the partnership receive a distribution from, or was it the grantor of, or transferor to, a foreign trust? If "Yes," the partnership may have to file Form 3520, Annual Return To Report Transactions With Foreign Trusts and Receipt of Certain Foreign Gifts. See instructions		X
12a Is the partnership making, or had it previously made (and not revoked), a section 754 election? See instructions for details regarding a section 754 election.		X
b Did the partnership make for this tax year an optional basis adjustment under section 743(b) or 734(b)? If "Yes," attach a statement showing the computation and allocation of the basis adjustment. See instructions		X
c Is the partnership required to adjust the basis of partnership assets under section 743(b) or 734(b) because of a substantial built-in loss (as defined under section 743(d)) or substantial basis reduction (as defined under section 734(d))? If "Yes," attach a statement showing the computation and allocation of the basis adjustment. See instructions		X
13 Check this box if, during the current or prior tax year, the partnership distributed any property received in a like-kind exchange or contributed such property to another entity (other than disregarded entities wholly owned by the partnership throughout the tax year) <input type="checkbox"/>		
14 At any time during the tax year, did the partnership distribute to any partner a tenancy-in-common or other undivided interest in partnership property?		X
15 If the partnership is required to file Form 8858, Information Return of U.S. Persons With Respect To Foreign Disregarded Entities, enter the number of Forms 8858 attached. See instructions ▶		
16 Does the partnership have any foreign partners? If "Yes," enter the number of Forms 8805, Foreign Partner's Information Statement of Section 1446 Withholding Tax, filed for this partnership. ▶		X
17 Enter the number of Forms 8865, Return of U.S. Persons With Respect to Certain Foreign Partnerships, attached to this return. ▶		
18a Did you make any payments in 2017 that would require you to file Form(s) 1099? See instructions	X	
b If "Yes," did you or will you file required Form(s) 1099?	X	
19 Enter the number of Form(s) 5471, Information Return of U.S. Persons With Respect To Certain Foreign Corporations, attached to this return. ▶ 0		
20 Enter the number of partners that are foreign governments under section 892. ▶ 0		
21 During the partnership's tax year, did the partnership make any payments that would require it to file Form 1042 and 1042-S under chapter 3 (sections 1441 through 1464) or chapter 4 (sections 1471 through 1474)?		X
22 Was the partnership a specified domestic entity required to file Form 8938 for the tax year (See the instructions for Form 8938)?		X

Designation of Tax Matters Partner (see instructions)

Enter below the general partner or member-manager designated as the tax matters partner (TMP) for the tax year of this return:

Name of designated TMP	▶ LINDA A. RECIO	Identifying number of TMP	▶ ***-**-3148
If the TMP is an entity, name of TMP representative	▶	Phone number of TMP	▶ 850-383-0111
Address of designated TMP	▶ 1432 VIEUX CARRE DRIVE TALLAHASSEE FL 32308		

Schedule K Partners' Distributive Share Items

		Total amount
Income (Loss)	1 Ordinary business income (loss) (page 1, line 22)	1 370,924
	2 Net rental real estate income (loss) (attach Form 8825)	2
	3a Other gross rental income (loss)	3a
	b Expenses from other rental activities (attach statement)	3b
	c Other net rental income (loss). Subtract line 3b from line 3a	3c
	4 Guaranteed payments	4 637,682
	5 Interest income	5 30
	6 Dividends: a Ordinary dividends	6a
	b Qualified dividends	6b
	7 Royalties	7
	8 Net short-term capital gain (loss) (attach Schedule D (Form 1065))	8
Deductions	9a Net long-term capital gain (loss) (attach Schedule D (Form 1065))	9a
	b Collectibles (28%) gain (loss)	9b
	c Unrecaptured section 1250 gain (attach statement)	9c
	10 Net section 1231 gain (loss) (attach Form 4797)	10
	11 Other income (loss) (see instructions) Type ▶	11
	12 Section 179 deduction (attach Form 4562)	12 7,088
	13a Contributions SEE STATEMENT 2	13a 250
	b Investment interest expense	13b
	c Section 59(e)(2) expenditures:	
	(1) Type ▶ (2) Amount ▶	13c(2)
	d Other deductions (see instructions) Type ▶ SEE STATEMENT 3	13d 42,000
Self-Employment	14a Net earnings (loss) from self-employment	14a 1,008,606
	b Gross farming or fishing income	14b
	c Gross nonfarm income	14c 2,389,864
Credits	15a Low-income housing credit (section 42(j)(5))	15a
	b Low-income housing credit (other)	15b
	c Qualified rehabilitation expenditures (rental real estate) (attach Form 3468, if applicable)	15c
	d Other rental real estate credits (see instructions) Type ▶	15d
	e Other rental credits (see instructions) Type ▶	15e
	f Other credits (see instructions) Type ▶	15f
Foreign Transactions	16a Name of country or U.S. possession ▶	
	b Gross income from all sources	16b
	c Gross income sourced at partner level	16c
	Foreign gross income sourced at partnership level	
	d Passive category ▶ e General category ▶ f Other ▶	16f
	Deductions allocated and apportioned at partner level	
	g Interest expense ▶ h Other ▶	16h
	Deductions allocated and apportioned at partnership level to foreign source income	
	i Passive category ▶ j General category ▶ k Other ▶	16k
	l Total foreign taxes (check one): ▶ Paid <input type="checkbox"/> Accrued <input type="checkbox"/>	16l
	m Reduction in taxes available for credit (attach statement)	16m
n Other foreign tax information (attach statement)		
Alternative Minimum Tax (AMT) Items	17a Post-1986 depreciation adjustment	17a -228
	b Adjusted gain or loss	17b
	c Depletion (other than oil and gas)	17c
	d Oil, gas, and geothermal properties – gross income	17d
	e Oil, gas, and geothermal properties – deductions	17e
	f Other AMT items (attach statement)	17f
Other Information	18a Tax-exempt interest income	18a
	b Other tax-exempt income	18b
	c Nondeductible expenses SEE STATEMENT 4	18c 25,369
	19a Distributions of cash and marketable securities	19a 324,091
	b Distributions of other property	19b
	20a Investment income	20a 30
	b Investment expenses	20b
c Other items and amounts (attach statement)		

Analysis of Net Income (Loss)

1 Net Income (loss). Combine Schedule K, lines 1 through 11. From the result, subtract the sum of Schedule K, lines 12 through 13d, and 16l						1	959,298
2 Analysis by partner type:		(i) Corporate	(ii) Individual (active)	(iii) Individual (passive)	(iv) Partnership	(v) Exempt Organization	(vi) Nominee/Other
a General partners							
b Limited partners			959,298				

Schedule L		Balance Sheets per Books		Beginning of tax year		End of tax year	
Assets		(a)		(b)		(c)	
1	Cash			111,724			67,196
2a	Trade notes and accounts receivable						
b	Less allowance for bad debts						
3	Inventories						
4	U.S. government obligations						
5	Tax-exempt securities						
6	Other current assets (attach statement) SEE STMT 5			126,991			195,000
7a	Loans to partners (or persons related to partners)						
b	Mortgage and real estate loans						
8	Other investments (attach statement)						
9a	Buildings and other depreciable assets	78,385				85,473	
b	Less accumulated depreciation	78,385		0		85,473	0
10a	Depletable assets						
b	Less accumulated depletion						
11	Land (net of any amortization)						
12a	Intangible assets (amortizable only)						
b	Less accumulated amortization						
13	Other assets (attach statement) SEE STMT 6			2,050			4,041
14	Total assets			240,765			266,237
Liabilities and Capital							
15	Accounts payable						
16	Mortgages, notes, bonds payable in less than 1 year						
17	Other current liabilities (attach statement) SEE STMT 7						11,316
18	All nonrecourse loans						
19a	Loans from partners (or persons related to partners)						
b	Mortgages, notes, bonds payable in 1 year or more						
20	Other liabilities (attach statement)						
21	Partners' capital accounts			240,765			254,921
22	Total liabilities and capital			240,765			266,237

Schedule M-1 Reconciliation of Income (Loss) per Books With Income (Loss) per Return

Note. The partnership may be required to file Schedule M-3 (see instructions).

1	Net income (loss) per books	338,247	6	Income recorded on books this year not included on Schedule K, lines 1 through 11 (itemize):	
2	Income included on Schedule K, lines 1, 2, 3c, 5, 6a, 7, 8, 9a, 10, and 11, not recorded on books this year (itemize):		a	Tax-exempt interest \$	
3	Guaranteed payments (other than health insurance)	637,682	7	Deductions included on Schedule K, lines 1 through 13d, and 16l, not charged against book income this year (itemize):	
4	Expenses recorded on books this year not included on Schedule K, lines 1 through 13d, and 16l (itemize):		a	Depreciation \$	
a	Depreciation \$			SEE STATEMENT 9	
b	Travel and entertainment \$ 11,810			42,000	42,000
	SEE STATEMENT 8		8	Add lines 6 and 7	42,000
	13,559	25,369	9	Income (loss) (Analysis of Net Income (Loss), line 1). Subtract line 8 from line 5	959,298
5	Add lines 1 through 4	1,001,298			

Schedule M-2 Analysis of Partners' Capital Accounts

1	Balance at beginning of year	240,765	6	Distributions: a Cash	324,091
2	Capital contributed: a Cash		b	Property	
	b Property				
3	Net income (loss) per books	338,247	7	Other decreases (itemize):	
4	Other increases (itemize):				
			8	Add lines 6 and 7	324,091
5	Add lines 1 through 4	579,012	9	Balance at end of year. Subtract line 8 from line 5	254,921

SCHEDULE B-1
(Form 1065)

(Rev. September 2017)

Department of the Treasury
Internal Revenue Service**Information on Partners Owning 50% or
More of the Partnership**

▶ Attach to Form 1065.

▶ Go to www.irs.gov/Form1065 for the latest information.

OMB No. 1545-0123

Name of partnership

EVERGREEN SOLUTIONS, LLC

Employer identification number (EIN)

****-***3438****Part I** **Entities Owning 50% or More of the Partnership** (Form 1065, Schedule B, Question 3a)

Complete columns (i) through (v) below for any foreign or domestic corporation, partnership (including any entity treated as a partnership), trust, tax-exempt organization, or any foreign government that owns, directly or indirectly, an interest of 50% or more in the profit, loss, or capital of the partnership (see instructions).

(i) Name of Entity	(ii) Employer Identification Number (if any)	(iii) Type of Entity	(iv) Country of Organization	(v) Maximum Percentage Owned in Profit, Loss, or Capital

Part II **Individuals or Estates Owning 50% or More of the Partnership** (Form 1065, Schedule B, Question 3b)

Complete columns (i) through (iv) below for any individual or estate that owns, directly or indirectly, an interest of 50% or more in the profit, loss, or capital of the partnership (see instructions).

(i) Name of Individual or Estate	(ii) Identifying Number (if any)	(iii) Country of Citizenship (see instructions)	(iv) Maximum Percentage Owned in Profit, Loss, or Capital
LINDA A. RECIO	***-**-3148	UNITED STATES	66.666700

For Paperwork Reduction Act Notice, see the Instructions for Form 1065.

Schedule B-1 (Form 1065) (Rev. 9-2017)

Schedule K-1
(Form 1065)Department of the Treasury
Internal Revenue Service

2017

For calendar year 2017, or tax year

☐ Final K-1☐ Amended K-1651113
OMB No. 1545-0123

beginning

ending

Partner's Share of Income, Deductions,
Credits, etc.

▶ See back of form and separate instructions.

Part I Information About the Partnership

A Partnership's employer identification number

-*3438

B Partnership's name, address, city, state, and ZIP code

EVERGREEN SOLUTIONS, LLC

2878 REMINGTON GREEN CIRCLE
TALLAHASSEE FL 32308

C IRS Center where partnership filed return

E-FILE

D ☐ Check if this is a publicly traded partnership (PTP)

Part II Information About the Partner

E Partner's identifying number

***-**-3148

F Partner's name, address, city, state, and ZIP code

LINDA A. RECIO

1432 VIEUX CARRE DRIVE
TALLAHASSEE FL 32308G ☒ General partner or LLC
member-manager☐ Limited partner or other LLC
memberH ☒ Domestic partner☐ Foreign partnerI What type of entity is this partner? INDIVIDUALJ If this partner is a retirement plan (IRA/SEP/Keogh/etc.), check here ☐

K Partner's share of profit, loss, and capital (see instructions):

	Beginning	Ending
Profit	66.666700 %	66.666700 %
Loss	66.666700 %	66.666700 %
Capital	66.666700 %	66.666700 %

K Partner's share of liabilities at year end:

Nonrecourse	\$
Qualified nonrecourse financing	\$
Recourse	\$

L Partner's capital account analysis:

Beginning capital account	\$	166,838
Capital contributed during the year	\$	
Current year increase (decrease)	\$	223,979
Withdrawals & distributions	\$	(180,291)
Ending capital account	\$	210,526

☒ Tax basis ☐ GAAP ☐ Section 704(b) book
☐ Other (explain)

M Did the partner contribute property with a built-in gain or loss?

☐ Yes ☒ No

If "Yes," attach statement (see instructions)

Part III Partner's Share of Current Year Income,
Deductions, Credits, and Other Items

1	Ordinary business income (loss)	15	Credits
	247,283		
2	Net rental real estate income (loss)		
3	Other net rental income (loss)	16	Foreign transactions
4	Guaranteed payments		
	335,960		
5	Interest income		
	20		
6a	Ordinary dividends		
6b	Qualified dividends		
7	Royalties		
8	Net short-term capital gain (loss)		
9a	Net long-term capital gain (loss)	17	Alternative minimum tax (AMT) items
		A	-152
9b	Collectibles (28%) gain (loss)		
9c	Unrecaptured section 1250 gain		
10	Net section 1231 gain (loss)	18	Tax-exempt income and nondeductible expenses
11	Other income (loss)	C*	STMT
12	Section 179 deduction	19	Distributions
	4,725	A	180,291
13	Other deductions	20	Other information
A	167		
R	24,000	A	20
14	Self-employment earnings (loss)		
A	583,243		
C	1,593,243		

*See attached statement for additional information.

For IRS Use Only

Schedule K-1, Line 18 - Tax-Exempt Income and Nondeductible Expenses

<u>Code</u>	<u>Description</u>	<u>Amount</u>
C	MEMBER LIFE INSURANCE	\$ 10,559
C	NONDEDUCTIBLE MEALS AND ENTERTAINMENT	7,873

Schedule K-1
(Form 1065)Department of the Treasury
Internal Revenue Service

2017

For calendar year 2017, or tax year

beginning

ending

Partner's Share of Income, Deductions,
Credits, etc.

▶ See back of form and separate instructions.

Part I Information About the Partnership

A Partnership's employer identification number

-*3438

B Partnership's name, address, city, state, and ZIP code

EVERGREEN SOLUTIONS, LLC

2878 REMINGTON GREEN CIRCLE
TALLAHASSEE FL 32308

C IRS Center where partnership filed return

E-FILE

D ☐ Check if this is a publicly traded partnership (PTP)

Part II Information About the Partner

E Partner's identifying number

***-**-5804

F Partner's name, address, city, state, and ZIP code

JEFFREY LING

1400 VILLAGE SQUARE BLVD. 3-515
TALLAHASSEE FL 32312-1250G ☒ General partner or LLC
member-manager☐ Limited partner or other LLC
memberH ☒ Domestic partner☐ Foreign partnerI1 What type of entity is this partner? INDIVIDUALI2 If this partner is a retirement plan (IRA/SEP/Keogh/etc.), check here ☐

J Partner's share of profit, loss, and capital (see instructions):

	Beginning	Ending
Profit	33.333300 %	33.333300 %
Loss	33.333300 %	33.333300 %
Capital	33.333300 %	33.333300 %

K Partner's share of liabilities at year end:

Nonrecourse	\$
Qualified nonrecourse financing	\$
Recourse	\$

L Partner's capital account analysis:

Beginning capital account	\$	73,927
Capital contributed during the year	\$	
Current year increase (decrease)	\$	114,268
Withdrawals & distributions	\$	(143,800)
Ending capital account	\$	44,395

☒ Tax basis ☐ GAAP ☐ Section 704(b) book
☐ Other (explain)

M Did the partner contribute property with a built-in gain or loss?

☐ Yes ☒ No

If "Yes," attach statement (see instructions)

☐ Final K-1☐ Amended K-1651113
OMB No. 1545-0123Part III Partner's Share of Current Year Income,
Deductions, Credits, and Other Items

1	Ordinary business income (loss)	15	Credits
	123,641		
2	Net rental real estate income (loss)		
3	Other net rental income (loss)	16	Foreign transactions
4	Guaranteed payments		
	301,722		
5	Interest income		
	10		
6a	Ordinary dividends		
6b	Qualified dividends		
7	Royalties		
8	Net short-term capital gain (loss)		
9a	Net long-term capital gain (loss)	17	Alternative minimum tax (AMT) items
		A	-76
9b	Collectibles (28%) gain (loss)		
9c	Unrecaptured section 1250 gain		
10	Net section 1231 gain (loss)	18	Tax-exempt income and nondeductible expenses
11	Other income (loss)	C*	STMT
12	Section 179 deduction	19	Distributions
	2,363	A	143,800
13	Other deductions	20	Other information
A	83		
R	18,000	A	10
14	Self-employment earnings (loss)		
A	425,363		
C	796,621		

*See attached statement for additional information.

For IRS Use Only

Schedule K-1, Line 18 - Tax-Exempt Income and Nondeductible Expenses

<u>Code</u>	<u>Description</u>	<u>Amount</u>
C	MEMBER LIFE INSURANCE	\$ 3,000
C	NONDEDUCTIBLE MEALS AND ENTERTAINMENT	3,937

Depreciation and Amortization
(Including Information on Listed Property)

▶ Attach to your tax return.

▶ Go to www.irs.gov/Form4562 for instructions and the latest information.

Name(s) shown on return

EVERGREEN SOLUTIONS, LLC

Identifying number

****-***3438**

Business or activity to which this form relates

FORM 1065, PAGE 1**Part I Election To Expense Certain Property Under Section 179****Note:** If you have any listed property, complete Part V before you complete Part I.

1	Maximum amount (see instructions)	1	510,000
2	Total cost of section 179 property placed in service (see instructions)	2	7,088
3	Threshold cost of section 179 property before reduction in limitation (see instructions)	3	2,030,000
4	Reduction in limitation. Subtract line 3 from line 2. If zero or less, enter -0-	4	0
5	Dollar limitation for tax year. Subtract line 4 from line 1. If zero or less, enter -0-. If married filing separately, see instructions	5	510,000
6	(a) Description of property	(b) Cost (business use only)	(c) Elected cost
	2 DELL COMPUTERS-LATITUDE 7480	4,790	4,790
	DELL LATITUDE 5480	2,298	2,298
7	Listed property. Enter the amount from line 29	7	
8	Total elected cost of section 179 property. Add amounts in column (c), lines 6 and 7	8	7,088
9	Tentative deduction. Enter the smaller of line 5 or line 8	9	7,088
10	Carryover of disallowed deduction from line 13 of your 2016 Form 4562	10	
11	Business income limitation. Enter the smaller of business income (not less than zero) or line 5 (see instructions)	11	510,000
12	Section 179 expense deduction. Add lines 9 and 10, but don't enter more than line 11	12	7,088
13	Carryover of disallowed deduction to 2018. Add lines 9 and 10, less line 12	13	

Note: Don't use Part II or Part III below for listed property. Instead, use Part V.**Part II Special Depreciation Allowance and Other Depreciation (Don't include listed property.) (See instructions.)**

14	Special depreciation allowance for qualified property (other than listed property) placed in service during the tax year (see instructions)	14	
15	Property subject to section 168(f)(1) election	15	
16	Other depreciation (including ACRS)	16	

Part III MACRS Depreciation (Don't include listed property.) (See instructions.)**Section A**

17	MACRS deductions for assets placed in service in tax years beginning before 2017	17	0
18	If you are electing to group any assets placed in service during the tax year into one or more general asset accounts, check here		

Section B—Assets Placed In Service During 2017 Tax Year Using the General Depreciation System

(a) Classification of property	(b) Month and year placed in service	(c) Basis for depreciation (business/investment use only—see instructions)	(d) Recovery period	(e) Convention	(f) Method	(g) Depreciation deduction
19a 3-year property						
b 5-year property						
c 7-year property						
d 10-year property						
e 15-year property						
f 20-year property						
g 25-year property			25 yrs.		S/L	
h Residential rental property			27.5 yrs.	MM	S/L	
			27.5 yrs.	MM	S/L	
i Nonresidential real property			39 yrs.	MM	S/L	
				MM	S/L	

Section C—Assets Placed In Service During 2017 Tax Year Using the Alternative Depreciation System

20a Class life				S/L	
b 12-year		12 yrs.		S/L	
c 40-year		40 yrs.	MM	S/L	

Part IV Summary (See instructions.)

21	Listed property. Enter amount from line 28	21	
22	Total. Add amounts from line 12, lines 14 through 17, lines 19 and 20 in column (g), and line 21. Enter here and on the appropriate lines of your return. Partnerships and S corporations—see instructions	22	
23	For assets shown above and placed in service during the current year, enter the portion of the basis attributable to section 263A costs	23	

For Paperwork Reduction Act Notice, see separate instructions.

Statement 1 - Form 1065, Page 1, Line 20 - Other Deductions

<u>Description</u>	<u>Amount</u>
BANK SERVICE CHARGES	\$ 302
CLEANING / JANITORIAL	5,450
DUES & SUBSCRIPTIONS	6,394
INSURANCE	13,704
ADVERTISING AND MARKETING	58,239
OFFICE SUPPLIES AND EXPENSE	14,217
PRINTING AND PRODUCTION	6,181
PROFESSIONAL DEVELOPMENT	5,872
PROFESSIONAL FEES - ACCTG	4,095
OUTSIDE SERVICES	161,820
TECHNOLOGY	25,876
TELEPHONE & FAX	13,617
TRAVEL	129,079
UTILITIES	6,467
POSTAGE & DELIVERY	220
PRC: DATA PURCHASE	8,030
EMPLOYEE BENEFITS	3,992
OFFICE EQUIPMENT	536
PROFESSIONAL FEES - OTHER	1,024
PROFESSIONAL FEES - LEGAL	890
PRC: SOFTWARE PURCHASES	251
MEALS AND ENTERTAIN (50%)	11,811
TOTAL	<u>\$ 478,067</u>

Federal Statements

Statement 2 - Form 1065, Schedule K, Line 13a - Contributions

Description	100%	50%	30%	20%	Total
CHARITABLE CONTRIBUTIONS	\$	\$ 250	\$	\$	\$ 250
TOTAL	\$ 0	\$ 250	\$ 0	\$ 0	\$ 250

Statement 3 - Form 1065, Schedule K, Line 13d - Other Deductions

Description	Amount
PENSIONS AND IRA'S	\$ 42,000
TOTAL	\$ 42,000

Statement 4 - Form 1065, Schedule K, Line 18c - Nondeductible Expenses

Description	Amount
NONDEDUCTIBLE MEALS AND ENTERTAINMENT	\$ 11,810
MEMBER LIFE INSURANCE	13,559
TOTAL	\$ 25,369

Statement 5 - Form 1065, Schedule L, Line 6 - Other Current Assets

Description	Beginning of Year	End of Year
DUE FROM LINDA RECIO	\$ 125,000	\$ 195,000
PREPAID CALIFORNIA INCOME TAX	1,991	
TOTAL	\$ 126,991	\$ 195,000

Statement 6 - Form 1065, Schedule L, Line 13 - Other Assets

Description	Beginning of Year	End of Year
DEPOSITS	\$ 2,050	\$ 4,041
TOTAL	\$ 2,050	\$ 4,041

Statement 7 - Form 1065, Schedule L, Line 17 - Other Current Liabilities

Description	Beginning of Year	End of Year
PAYROLL LIABILITIES	\$	\$ 232
RETIREMENT CONTRIBUTION PAYAB		11,084
TOTAL	\$ 0	\$ 11,316

Statement 8 - Form 1065, Schedule M-1, Line 4 - Expenses Recorded on Books, Not on Sch K

Description	Amount
MEMBER LIFE INSURANCE	\$ 13,559
TOTAL	\$ 13,559

Statement 9 - Form 1065, Schedule M-1, Line 7 - Deductions Included on Sch K, Not on Books

Description	Amount
PENSIONS AND IRAS CONSIDERED GUARANTEED PAYMENTS	\$ 42,000
TOTAL	\$ 42,000

Year Ending: December 31, 2017

-*3438

Evergreen Solutions, LLC
2878 Remington Green Circle
Tallahassee, FL 32308

Section 1.263(a)-1(f) De Minimis Safe Harbor Election

Under Regulation 1.263(a)-1(f), the taxpayer hereby elects to apply the de minimis safe harbor election to all qualifying property placed in service during the tax year.

6.0 *Variations and Exceptions*

Evergreen will comply with all requirements included in the scope of work of the Request for Proposal. Evergreen doesn't take any variations or exceptions to any section of the RFP.



7.0 *Litigation Statement*

No litigation or regulatory action has been filed against Evergreen Solutions in the last three years.



8.0 *Experience*

As required in the Request for Proposal, we have provided five references on the attached form that we feel demonstrate the breadth and quality of the work our team has performed within the past five years or that we are currently on contract to perform as it relates to the services being requested by the Town of Palm Beach. We invite you to contact our client references as to the quality and timeliness of our consulting projects. Additional references are available upon request.





**TOWN OF PALM BEACH
RFP No. 2018-49**

COMPENSATION AND BENEFITS STUDY

LIST OF CURRENT & PERTINENT PROFESSIONAL REFERENCE

The following is a list of at least **five (5)** current (within last five years) and pertinent professional references (preferably public entities) that the Town can contact in relation to Proposer's Proposals, financial stability, and experience. Failure to furnish this information may be grounds for rejection of the proposal.

1. Name and Address of Firm, City, County, or Agency	Scope of Work:	Classification & Compensation Study
Palm Beach County	Date(s):	4/1/18 to Present
100 Australian Avenue, Suite 300	Amount:	\$189,000
West Palm Beach, Florida 33406	Contact:	Maria Figueroa
	Telephone No:	(561) 616-6873
	Email:	MFiguroa@pbcgov.org
For Town Use Only: Comments:		
Reference Verified: Yes ___ No ___		

2. Name and Address of Firm, City, County, or Agency	Scope of Work:	Pay & Classification Study
City of Doral	Date(s):	9/15/14 to 1/15/15
8401 NW 53 rd Terrace	Amount:	\$39,000
Doral, Florida 33166	Contact:	Francisco Rios
	Telephone No:	(305) 593-6725 x.1500
	Email:	Francisco.Rios@cityofdoral.com
For Town Use Only: Comments:		
Reference Verified: Yes ___ No ___		

3. Name and Address of Firm, City, County, or Agency	Scope of Work:	Employee Compensation Services
City of Coral Springs	Date(s):	4/1/15 to 8/1/15
City Hall	Amount:	\$38,000
9551 West Sample Road	Contact:	Dale Pazdra
Coral Springs, Florida 33065	Telephone No:	(954) 344-1152
	Email:	DPazdra@coralsprings.org
For Town Use Only: Comments:		
Reference Verified: Yes ___ No ___		

4. Name and Address of Firm, City, County, or Agency	Scope of Work:	Compensation & Classification Study
Town of Davie	Date(s):	2/15/17 to 2/14/18
6591 Orange Drive	Amount:	\$48,500
Davie, Florida 33314	Contact:	Grace Garagozzo
	Telephone No:	(954) 797-1100
	Email:	ggaragozzo@davie-fl.org
For Town Use Only: Comments:		
Reference Verified: Yes ___ No ___		

5. Name and Address of Firm, City, County, or Agency	Scope of Work:	Compensation & Classification Study
City of Palm Beach Gardens	Date(s):	12/1/15 to 6/1/16
10500 North Military Trail	Amount:	\$34,500
Palm Beach Gardens, Florida 33410	Contact:	Sheryl Stewart
	Telephone No:	(561) 799-4132
	Email:	sstewart@pbgfl.com
For Town Use Only: Comments:		
Reference Verified: Yes ___ No ___		

Company Name: Evergreen Solutions, LLC

9.0 Cost Detail

Evergreen Solutions, LLC is pleased to present our proposed costs to conduct a Compensation and Benefits Study for the Town of Palm Beach. Evergreen Solutions is committed to providing the highest quality consulting services to our client partners for a reasonable price. Evergreen Solutions is fortunate that our overhead is minimal and our expenses are reasonable so we can pass that cost savings on to our clients.

As required in the Request for Proposal (RFP), we have attached the "Cost Proposal Form" that identifies our costs based on the description of services outlined in the scope of work of the RFP. Our cost is all inclusive, and includes travel costs (meals and lodging), transportation, fringe benefits, indirect cost (overhead), clerical support, and all other out-of-pocket expenses. Our cost also includes two onsite visits to the Town of Palm Beach to perform the requested work.

The following is our preferred invoicing schedule:

- 33% - upon completion of Tasks 1 – 2 of our work plan
- 33% - upon completion of Tasks 3 – 5 of our work plan
- 34% - upon completion of Tasks 6 – 8 of our work plan

We are willing to negotiate the time, scope, and cost of the basic tasks, or any other options that the Town of Palm Beach wishes to identify. Evergreen Solutions federal employer identification number is 20-1833438.





TOWN OF PALM BEACH

RFP No. 2018-49

COMPENSATION AND BENEFITS STUDY

COST PROPOSAL PAGES

Item	Description of services	Amount
1	Salary Range Evaluation	\$26,000 ⁰⁰
2	Retirement Benefits Evaluation	\$4,825 ⁰⁰
3	Other Pay Practices Evaluation	\$1,625 ⁰⁰
TOTAL:		\$32,500

Note: Town may request for the study to be completed in sections (salary range, retirement, and other pay practices) based on organizational needs.

The hereby undersigned representative submits this proposal and certifies that they are an authorized representative of the proposer who may legally bind the proposer:

***SIGNATURE:** _____

Date: 8/13/18

Name: Dr. Jeff Ling

Title: Executive Vice-President

Company: Evergreen Solutions, LLC

Printed

Address: 2878 Remington Green Circle

City: Tallahassee

Legally registered name

State: FL

Zip: 32308

Telephone No: (850) 383-0111

Fax No: (850) 383-1511

Email: _____

Federal ID #: 20-1833438

Dun Bradstreet #: 17-696-0842

***Failure to affix signature may result in disqualification of proposal**

10.0 *Forms*

As required in the Request for Proposal (RFP), we have attached the following forms from the RFP:

- Proposer's Checklist
- Acknowledgement of Addendums 1 and 2
- Proposer's Qualifications Form
- Drug-Free Work Place Certification
- List of Proposed Subcontractors
- Certificate of Insurance



Name of Company Representative: Dr. Jeff Ling, Exec. Vice President
 Address: 2878 Remington Green Cir., Tallahassee, FL 32308
 Phone Number: (850) 383-0111 Fax Number: (850) 383-1511
 E Mail: jeff@consultevergreen.com Date 8/13/18

Acknowledgement is hereby made of the following Addenda received since issuance of this Request for Proposals:

Addendum No. 1 Dated: 7/25/18 Addendum No. 2 Dated: 8/10/18

Addendum No. _____ Dated: _____ Addendum No. _____ Dated: _____

Addendum No. _____ Dated: _____ Addendum No. _____ Dated: _____

PROPOSER'S CHECKLIST

All proposals shall include the Town provided forms. Failure to do so may cause the proposal to be rejected. All blanks on the forms must be completed. Supplemental information may be attached to the forms. This list is not meant to be all-inclusive of all items required.

Is a Title Page included?	<input checked="" type="radio"/> Yes	<input type="radio"/> No
Is a Table of Contents provided?	<input checked="" type="radio"/> Yes	<input type="radio"/> No
Have 6 copies been provided?	<input checked="" type="radio"/> Yes	<input type="radio"/> No
Transmittal/Introduction Letter submitted?	<input checked="" type="radio"/> Yes	<input type="radio"/> No
Technical Proposal Section with Qualifications & Approach?	<input checked="" type="radio"/> Yes	<input type="radio"/> No
Financial Information Section with Indication of Resources?	<input checked="" type="radio"/> Yes	<input type="radio"/> No
Variations/Exceptions Section?	<input checked="" type="radio"/> Yes	<input type="radio"/> No
Litigation Section?	<input checked="" type="radio"/> Yes	<input type="radio"/> No
Proposer's Experience Section with 5 References?	<input checked="" type="radio"/> Yes	<input type="radio"/> No
Minimum 5 clients shown?	<input checked="" type="radio"/> Yes	<input type="radio"/> No
Staffing levels been explained?	<input checked="" type="radio"/> Yes	<input type="radio"/> No
Qualifications of personnel provided?	<input checked="" type="radio"/> Yes	<input type="radio"/> No
List of Current Contracts and Schedule Requirements?	<input checked="" type="radio"/> Yes	<input type="radio"/> No
Cost Proposal completed with fee schedule?	<input checked="" type="radio"/> Yes	<input type="radio"/> No
Proposer's Qualifications Form submitted?	<input checked="" type="radio"/> Yes	<input type="radio"/> No
Business Tax Receipt included?	<input checked="" type="radio"/> Yes	<input type="radio"/> No
Form W-9 included?	<input checked="" type="radio"/> Yes	<input type="radio"/> No
Is Drug-Free Workplace Certification form submitted?	<input checked="" type="radio"/> Yes	<input type="radio"/> No
Is Professional References form submitted?	<input checked="" type="radio"/> Yes	<input type="radio"/> No
Do References include current clients?	<input checked="" type="radio"/> Yes	<input type="radio"/> No
List of Subcontractors provided?	<input checked="" type="radio"/> Yes	<input checked="" type="radio"/> No N/A
Verification/acknowledgement of insurance capabilities?	<input checked="" type="radio"/> Yes	<input type="radio"/> No
Are all proposal pages signed?	<input checked="" type="radio"/> Yes	<input type="radio"/> No
Are addenda acknowledged?	<input checked="" type="radio"/> Yes	<input type="radio"/> No



**TOWN OF PALM BEACH
RFP No. 2018-49
COMPENSATION AND BENEFITS STUDY**

July 25, 2018

Addendum No. 1

This addendum shall modify and become a part of the original Solicitation Document.

The purpose of this addendum is to share information discussed at the pre-proposal meeting and answer questions received.

The due date remains August 15, 2018, at 2:00 p.m.

CLARIFICATIONS

Additional Requirements – As outlined on page 16 of the RFP document, the selected consultant will be required to make presentations to Town Staff and Town Council with the study findings. Any fees associated with these presentations are to be included the costs submitted on the Cost Proposal Page (pg. 21). If the consultant is required to prepare an implementation and cost analysis they may submit a separate cost proposal.

Innovative Concepts and Recommendations – If the consultant is recommending innovations with added costs they may submit them as an additional fee schedule.

Time Frame – We anticipate an award will be made in September with an agreement signed by October. The study should be completed as soon as possible.

Protected Salary Information – Any supporting data obtained from private sources may be kept confidential. At a minimum the Town will need to know the industry sampled, the size of the organization sampled, the type of organization sampled and their location. All material submitted with your proposal will become public record unless exempted as allowed by Florida State Statute Chapter 119.

Job Study – A review of job/position descriptions is not part of the study.

ERP System – The Town uses Eden software (Tyler Technologies) as their Enterprise Resource Planning system. In addition, the Town utilizes Insight (NeoGov) for applicant tracking and job classification specifications.

Regional Talent – The Town considers Palm Beach County as their primary geographical area for employees. This area may also extend to Southern Martin County and Northern Broward County.

Budget – The Town does not have a specific budget, at this time, for this study.

Past Salary Surveys – The Town has not contracted for a formal salary survey over the past several years.

Any questions concerning this document should be addressed to the undersigned Purchasing Coordinator via facsimile to (561) 835-4688 or e-mail to: dbasha@townofpalmbeach.com

Duke Basha
Assistant Purchasing Manager

All Proposers shall acknowledge receipt of this addendum by annotating the Schedule of Bid Items/Proposal signature page with the addendum number and completing the following section and returning with the Proposal Documents to verify receipt.

Company Name: Evergreen Solutions, LLC

2878 Remington Green Circle

Address: Tallahassee, FL 32308

City, State, and Zip Code:

Authorized Signature:

Dr. Jeff King, Executive Vice-President

Print Name and Title:

Telephone: (850) 383-0111 Date: 8/13/18



**TOWN OF PALM BEACH
RFP No. 2018-49
COMPENSATION AND BENEFITS STUDY**

August 10, 2018

Addendum No. 2

This addendum shall modify and become a part of the original Solicitation Document.

The purpose of this addendum is to answer questions received.

The due date remains August 15, 2018, at 2:00 p.m.

CLARIFICATIONS

Q1: Where does the Town typically hire / recruit from, and lose talent to? Does this differ by type of classification/job? If so, how?

A1: The Town's primary recruitment market is Palm Beach County. However, we have also both recruited and lost talent to Broward and Martin Counties. Further details about turnover and market conditions with respect to recruitment will be supplied to the awarded firm.

Q2: Is the Town open to conducting a custom survey to capture all peer organizations? If so, is the Town open to providing custom survey participants with a summary report, in order to help increase participation? Recognizing that the fee for a custom survey is generally more than gathering data from general resources how would we ensure that the Town is able to properly compare RFP responses that might differ in this regard?

A2: Florida's broad public record law provides access via record requests to public entity salary and job data. Therefore, the Town has no concern with protected salary data and sharing survey results is in alignment with public record disclosure. The consultant shall provide the Town with the method by which they will obtain and analyze salary data and submit pricing they believe to be in alignment with the work they propose to perform.

Q3: Are there specific organizations that must be included in this study, and if so, who are they?

A3: Additional information will be supplied to the awarded firm.

Q4: Does the [Town] wish to include retiree health and welfare benefits in the study?

A4: No.

Q5: What classifications/jobs or employee segments are considered critical to the Town? Why are these groups critical (e.g. challenging to hire/scare talent in the market, visibility of role to our external constituents, etc.)?

A5: The Town places a high value on all of its employees and believes that the entire team is essential to providing on-going exceptional public service to its residents. Public Safety is of utmost importance, along with Public Works and administrative operations. Familiarity with the labor market, unemployment, and total compensation trends in the local market would be beneficial to a consultant performing this work. As mentioned in the pre-bid meeting, the Town will provide turnover and recruitment needs data to the awarded firm.

Q6: Does the Town have an expectation for how the Town's Senior Leadership Team will be involved in this project?

A6: The requested information will be supplied to the awarded firm.

Q7: Please describe the Town's stakeholders (e.g. Senior Leadership Team, Human Resources, Managers, Employees, Cross-Functional Teams, etc.) and any expectations on how they will be involved in the project, and when.

A7: The requested information will be supplied to the awarded firm.

Q8: Additionally, what is currently effective about the Town's reward policies and practices? What, if anything needs to change?

A8: The requested information will be supplied to the awarded firm.

Q9: Does the Town need an analysis around FLSA designations? If so, does the Town have any specific concerns? If so, what are they and how have they been addressed in the past, if at all?

A9: No.

Q10: Does a job family structure currently exist? If so please provide a list of the job families and how it is currently structured?

A10: Refer to the attached list of all current Job Titles with Job Classifications.

Q11: Does the Town currently have a process for “leveling” jobs (separate from the compensation structure) based on scope, complexity of work and other job dimensions? If so, please explain and provide.

A11: Job analysis and classification determination will be supplied to the awarded firm.

Q12: With regard to implementation of any compensation recommendations that result from this study, does the Town have any priorities or critical requirements?

A12: The requested information will be supplied to the awarded firm.

Q13: Are there current classifications or groups of classifications of jobs that receive “extra pay”/bonuses for “advanced skill/responsibilities”? If so, what are they and why?

A13: The requested information will be supplied to the awarded firm.

Q14: What is the Town’s budget for this project? Is there a “cannot exceed limit” based on the Town’s expectation for this project’s investment?

A14: There is no established budget or cannot exceed limit for this project. The Town expects the consultants proposing for the work to present well considered outline of the project as proposed and their best pricing to accomplish the goals of the same.

Q15: Is the Town currently partnering with any external vendors on related human resources projects? If so, who are the vendor(s) and what is the work? Is there any expectation that this project will integrate with those projects?

A15: There is no expectation that this project will integrate with any other human resources projects.

Q16: What method does the Town currently use to communicate changes? What has worked well in the past? What has not worked as well? Are there new communications methods that the Town would like to consider? Please describe.

A16: The Town maintains open communication with employees by all means possible including but not limited to email, group meetings, individual meetings, and printed notices. The Town is open to consider any options that are within the scope of this project.

Q17: Can Contractor submit its form Engagement Letter and SOW as part of its response to the RFP as the basis for contract negotiations, should Contractor win the work?

A17: As stated in the RFP document: Any additional contract or agreement requested for consideration by the Proposer must be attached and enclosed as part of the proposal.

Q18: Recognizing that the Town requests that the study be completed as soon as possible after the agreement is signed in October, are there any timing limitations for the completion of the study? For example, must the study be completed before an already agreed to meeting date or start date for any changes?

A18: There are no specific timing limitations for the study. The Town would like the project, in part or whole, completed as soon as possible so decisions, especially those with financial implications, can be vetted prior to implementation and the budget planning for the next fiscal year. Typically, budget planning begins in late March for the next fiscal year, which begins annually on October 1.

Q19: Would the Town consider any negotiation of the extremely broad indemnification obligations set forth in section 1-14?

A19: The Town prefers that the Indemnification clause remain, as stated. However, proposers may note any exceptions or variations in their submittal.

Q20: Would the Town allow negotiation of a reasonable limitation of the contractor’s liability (to include its obligations under section 1-14)?

A20: See response to Question #19, above.

Any questions concerning this document should be addressed to the undersigned Purchasing Coordinator via facsimile to (561) 835-4688 or e-mail to: dbasha@townofpalmbeach.com

Duke Basha
Assistant Purchasing Manager

All Proposers shall acknowledge receipt of this addendum by annotating the Schedule of Bid Items/Proposal signature page with the addendum number and completing the following section and returning with the Proposal Documents to verify receipt.

Company Name: Evergreen Solutions
Address: 2878 Remington Green Circle
Tallahassee, FL 32308
City, State, and Zip Code:
Authorized Signature: Dr. Jeff King, Exec. Vice-President
Print Name and Title
Telephone: (850) 383 0111 Date: 8/10/18

Job Title	Job Family
Accountant	Administrative (Clerical/Fiscal)
Accounting Technician	Administrative (Clerical/Fiscal)
Acting Director Of Pzb	Executive
Acting Police Chief	Executive
Activity Leader	Recreation/ Public Welfare
Administrative Aide	Administrative (Clerical/Fiscal)
Administrative Assistant	Administrative (Clerical/Fiscal)
Administrative Assistant li/Assistant To Mayor & Town Council	Administrative (Clerical/Fiscal)
Administrative Clerk	Administrative (Clerical/Fiscal)
Administrative Coordinator	Administrative (Clerical/Fiscal)
Administrative Manager	Administrative (Clerical/Fiscal)
Assistant Director Of Finance	Executive
Assistant Director Of Human Resources	Executive
Assistant Director Of Public Works	Executive
Assistant Director Of Recreation	Executive
Assistant Fire-Rescue Chief	Executive
Assistant Information Technology Manager	Professional/Technical/Supervisory
Assistant Purchasing Manager	Professional/Technical/Supervisory
Battalion Chief	Executive
Budget Analyst	Administrative (Clerical/Fiscal)
Building Maintenance Worker	Trades/Maintenance
Building Official	Executive
Bus Driver	Recreation/ Public Welfare
Buyer	Administrative (Clerical/Fiscal)
Chief Building Inspector	Professional/Technical/Supervisory
Chief Electrical Inspector	Professional/Technical/Supervisory
Chief Plumbing Inspector	Professional/Technical/Supervisory
Civil Engineer	Professional/Technical/Supervisory
Coastal Program Manager	Professional/Technical/Supervisory
Code Compliance Officer I	Administrative (Clerical/Fiscal)
Combination Building Inspector	Professional/Technical/Supervisory
Combination Plan Reviewer	Professional/Technical/Supervisory
Courier/Warehouse Assistant	Administrative (Clerical/Fiscal)
Crane Operator	Laborer/Equipment Operator
Crew Foreman/Irrigation Specialist	Trades/Maintenance
Crime Intelligence Analyst	Professional/Technical/Supervisory
Crime Scene Evidence Manager	Professional/Technical/Supervisory
Crime Scene Evidence Tech II	Professional/Technical/Supervisory
Deputy Town Clerk	Administrative (Clerical/Fiscal)
Deputy Town Manager	Executive
Development Geoprocessor Technician	Administrative (Clerical/Fiscal)
Development Permit Coordinator	Administrative (Clerical/Fiscal)
Director Of Finance	Executive
Director Of Human Resources	Executive
Director Of Planning Zoning & Building	Executive
Director Of Public Works	Executive
Director Of Recreation	Executive
Division Chief - EMS Coordinator	Executive
Division Chief - Trng & Safety	Executive
Dock Attendant	Laborer/Equipment Operator
Dockmaster	Trades/Maintenance
Document Management Coordinator	Professional/Technical/Supervisory
Electrician Supervisor	Trades/Maintenance
Equipment Operator	Laborer/Equipment Operator
Equipment Operator I	Laborer/Equipment Operator
Equipment Operator II	Laborer/Equipment Operator
Equipment Operator II/Beach Cleaner	Laborer/Equipment Operator
Equipment Operator III	Laborer/Equipment Operator
Facilities Maint Div Manager	Executive
Ff Driver/Engineer Emt	Fire Rescue (non-admin)

Job Title	Job Family
Ff Driver/Engineer Paramedic	Fire Rescue (non-admin)
Fire Inspector	Fire Rescue (non-admin)
Fire Marshal	Executive
Firefighter Emt	Fire Rescue (non-admin)
Firefighter Paramedic	Fire Rescue (non-admin)
Fire-Rescue Chief	Executive
Fleet Manager	Trades/Maintenance
Fleet Mechanic	Trades/Maintenance
Fleet Mechanic Supervisor	Trades/Maintenance
General Maintenance Supervisor	Trades/Maintenance
Gis Coordinator	Professional/Technical/Supervisory
Golf Course Associate	Recreation/ Public Welfare
Golf Course Mechanic	Trades/Maintenance
Golf Course Superintendent	Trades/Maintenance
Golf Manager	Recreation/ Public Welfare
Grounds Supervisor	Trades/Maintenance
Grounds Technician	Laborer/Equipment Operator
Human Resources Analyst	Professional/Technical/Supervisory
Human Resources Coordinator	Administrative (Clerical/Fiscal)
Human Resources Specialist	Administrative (Clerical/Fiscal)
Industrial Electrician	Trades/Maintenance
Information Technology Manager	Executive
Information Technology Specialist	Professional/Technical/Supervisory
Instructor	Recreation/ Public Welfare
Irrigation And Spray Technician	Laborer/Equipment Operator
Junior Buyer	Administrative (Clerical/Fiscal)
Laborer I	Laborer/Equipment Operator
Landfill Operator	Trades/Maintenance
Lead Parking Enforcement Officer	Administrative (Clerical/Fiscal)
Lead Telecommunications Supervisor	Administrative (Clerical/Fiscal)
Lieutenant/Paramedic	Fire Rescue (non-admin)
Lifeguard	Recreation/ Public Welfare
Lifeguard On-Call	Recreation/ Public Welfare
Maintenance Associate	Recreation/ Public Welfare
Maintenance Worker	Trades/Maintenance
Master Mechanic/PD	Trades/Maintenance
Occupational Health & Wellness Nurse	Recreation/ Public Welfare
Office Assistant II	Administrative (Clerical/Fiscal)
Office Assistant III	Administrative (Clerical/Fiscal)
Office Manager	Administrative (Clerical/Fiscal)
Parking Enforcement Officer	Administrative (Clerical/Fiscal)
Parking/Code Enforcement Manag	Professional/Technical/Supervisory
Parking/Code Enforcement Specialist	Administrative (Clerical/Fiscal)
Part Time Police Officer	Police (non-admin)
Planning Administrator	Professional/Technical/Supervisory
Police Captain	Executive
Police Lieutenant Prof Standards	Police (non-admin)
Police Major	Executive
Police Officer	Police (non-admin)
Police Planner	Professional/Technical/Supervisory
Police Records Specialist	Administrative (Clerical/Fiscal)
Police Sergeant	Police (non-admin)
Police Trainee	Police (non-admin)
Project Engineer	Professional/Technical/Supervisory
Pro-Shop Assistant	Recreation/ Public Welfare
Purchasing Coordinator	Professional/Technical/Supervisory
Purchasing Manager	Professional/Technical/Supervisory
Pw Systems Specialist	Professional/Technical/Supervisory
Records Assistant I	Administrative (Clerical/Fiscal)
Recreation Associate I	Recreation/ Public Welfare

Job Title

Recreation Associate II
Recreation Supervisor
Right Of Way Inspector II
Risk Manager
Senior Golf Associate
Senior Project Engineer
Services Division Manager
Sr Industrial Electrician
Street & Sign Painter
Supervisor Lifeguard
Supervisor/Sanitation
Supervisor/Trash
Systems Administrator
Telecommunicator
Telecommunicator Supervisor
Tennis Attendant
Tennis Facility Assistant
Tennis Facility Supervisor
Town Clerk
Town Engineer
Town Manager
Training & Comm Relations Coor
Transfer Station Operator
Underground Utilities Project Manager
Utilities Maint Supervisor
Vehicle Technician
Warehouse Coordinator
Water Resource Technician I
Water Resource Technician II
Water Resources Division Manager
Zoning Administrator
Zoning Technician / Special Assistant To Director

Job Family

Recreation/ Public Welfare
Recreation/ Public Welfare
Professional/Technical/Supervisory
Professional/Technical/Supervisory
Recreation/ Public Welfare
Professional/Technical/Supervisory
Executive
Trades/Maintenance
Trades/Maintenance
Recreation/ Public Welfare
Trades/Maintenance
Trades/Maintenance
Professional/Technical/Supervisory
Administrative (Clerical/Fiscal)
Administrative (Clerical/Fiscal)
Recreation/ Public Welfare
Administrative (Clerical/Fiscal)
Recreation/ Public Welfare
Professional/Technical/Supervisory
Executive
Executive
Professional/Technical/Supervisory
Laborer/Equipment Operator
Professional/Technical/Supervisory
Trades/Maintenance

Administrative (Clerical/Fiscal)
Trades/Maintenance
Trades/Maintenance
Executive
Professional/Technical/Supervisory
Administrative (Clerical/Fiscal)



TOWN OF PALM BEACH

RFP No. 2018-49

COMPENSATION AND BENEFITS STUDY

PROPOSER'S QUALIFICATIONS

The Proposer, as a result of this proposal, must hold a County and/or Municipal Tax Receipt (Occupational License) in the area of their fixed business location. Each proposer must complete the following information and submit with their proposal in order to be considered:

1. Legal Name and Address:

Name: Evergreen Solutions, LLC
Address: 2878 Remington Green Circle
City, State, Zip: Tallahassee, FL 32308 Phone (850) 383-0111 Fax: (850) 383-1511

2. Check One: Corporation () Partnership ☒ Individual () See attached license

3. If Corporation, state: Date of Incorporation: _____ State in which Incorporated: _____

4. If an out-of-state Corporation, currently authorized to do business in Florida, give date of such authorization: _____

5. Name and Title of Principal Officers

Date Elected:

Dr. Linda Recio, President
Dr. Jeff Ling, Exec. V. P.

2004
2004

6. The Vendor's length of time in business: 13 1/2 years

7. The Vendor's length of time (continuous) in business as a service organization in Florida: 13 1/2 years

8. All proposers must disclose with their proposal the name of any officer, director or agent who is also an employee of the Town. Further, all proposers must disclose the name of any Town employee who owns, directly or indirectly, an interest in the bidder's firm or any of its branches.

Name N/A Percentage of Interest: _____

9. A copy of County and/or Municipal Tax Receipt (Occupational License) in the area of their fixed business location.

10. A current, signed copy of your firm's IRS form W-9.

City of Tallahassee no longer provides as of 2017 - See attached

Note: Information requested herein and submitted by the proposers will be analyzed by the Town of Palm Beach and will be a factor considered in awarding any resulting contract. The purpose is to insure that the Proposers, in the sole opinion of the Town of Palm Beach, can sufficiently and efficiently perform all the required services in a timely and satisfactory manner as will be required by the subject contract. If there are any terms and/or conditions that are in conflict, the most stringent requirement shall apply.

State of Florida

Department of State

I certify from the records of this office that EVERGREEN SOLUTIONS, LLC is a limited liability company organized under the laws of the State of Florida, filed on October 8, 2004.

The document number of this limited liability company is L04000073478.

I further certify that said limited liability company has paid all fees due this office through December 31, 2018, that its most recent annual report was filed on January 4, 2018, and that its status is active.

*Given under my hand and the
Great Seal of the State of Florida
at Tallahassee, the Capital, this
the Fourth day of January, 2018*



Ken DeFuria
Secretary of State

Tracking Number: CC0852599265

To authenticate this certificate, visit the following site, enter this number, and then follow the instructions displayed.

<https://services.sunbiz.org/Filings/CertificateOfStatus/CertificateAuthentication>



*Business
Tax Certificate*

EVERGREEN SOLUTIONS, LLC
LINDA RECIO
2878 REMINGTON GREEN CIR
TALLAHASSEE FL 32308

Account Number: 63438

The Business Tax Certificate for tax year 2017 is attached below.

This certificate expires September 30th, 2017.

Please detach and display in a prominent place at the business location.

To cancel a business account with the City of Tallahassee, please return this certificate with a letter identifying the final day of business.

To transfer ownership or location, please follow the instructions on the reverse side of the tax certificate.

Each April the "Declaration of Information Form" is mailed to all non-professional, commercial locations. This Declaration must be completed and returned prior to June 15th. Failure to accurately complete the Declaration of Information can result in a 25% tax increase.

For information concerning the Business Tax, please visit Talgov.com or call the Revenue Division at (850) 891-6488.

Thank you for your Payment

2016-17

CITY OF TALLAHASSEE BUSINESS TAX CERTIFICATE
LOCAL BUSINESS TAX RECEIPT

2016-17

TAX CERTIFICATE EXPIRES SEPTEMBER 30, 2017

DBA: EVERGREEN SOLUTIONS, LLC
Location: 2878 REMINGTON GREEN CIR
Address: TALLAHASSEE FL 32308

Account Number: 63438

Type Code	Sub Code	Type Description
850	J	Service - Consultants

EVERGREEN SOLUTIONS, LLC
LINDA RECIO

The firm, corporation, organization, business or individual whose name appears herein has paid a business tax for the business activities indicated above, subject to city, state and federal laws. This certificate must be conspicuously displayed at the location of the business activity. A change of location from the stated business location on this certificate as well as a change in ownership requires a transfer. (See reverse side.)

Request for Taxpayer Identification Number and Certification

Give Form to the
requester. Do not
send to the IRS.

► Go to www.irs.gov/FormW9 for instructions and the latest information.

Print or type. See Specific Instructions on page 3.	1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank. EVERGREEN SOLUTIONS, LLC	
	2 Business name/disregarded entity name, if different from above	
	3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only one of the following seven boxes. <input type="checkbox"/> Individual/sole proprietor or single-member LLC <input type="checkbox"/> C Corporation <input type="checkbox"/> S Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Trust/estate <input checked="" type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) P Note: Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is not disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner. <input type="checkbox"/> Other (see instructions) ►	
	4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3): Exempt payee code (if any) _____ Exemption from FATCA reporting code (if any) _____ <small>(Applies to accounts maintained outside the U.S.)</small>	
	5 Address (number, street, and apt. or suite no.) See instructions. 2878 REMINGTON GREEN CIRCLE	Requester's name and address (optional)
	6 City, state, and ZIP code TALLAHASSEE, FLORIDA 32308	
	7 List account number(s) here (optional)	

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

Note: If the account is in more than one name, see the instructions for line 1. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Social security number								
			-				-	
or								
Employer identification number								
2	0	-	1	8	3	3	4	8

Part II Certification

Under penalties of perjury, I certify that:

- The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
- I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
- I am a U.S. citizen or other U.S. person (defined below); and
- The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign Here	Signature of U.S. person ► 	Date ► 8/13/2018
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General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to www.irs.gov/FormW9.

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

- Form 1099-INT (interest earned or paid)

- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)
- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, later.



TOWN OF PALM BEACH

RFP No. 2018-49

COMPENSATION AND BENEFITS STUDY

DRUG-FREE WORK PLACE CERTIFICATION

Whenever two (2) or more bids/proposals, which are equal with respect to price, quality, and service, are received by the Town of Palm Beach for the procurement of commodities or contractual services, a bid/proposal received from a business that certifies that it has implemented a drug-free workplace program shall be given preference in the award process. In order to have a drug-free workplace program, a business shall:

1. Publish a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession or use of controlled substances is prohibited in the workplace and specifying the actions that will be taken against employees for violations of such prohibition.
1. Inform employees about the dangers of drug abuse in the workplace, the business's policy of maintaining a drug-free workplace, any available drug counseling, rehabilitation, and employee assistance programs, and the penalties that may be imposed upon employees for drug abuse violations.
2. Give each employee engaged in providing the commodities or contractual services that are under bid a copy of the statement specified in number (1).
3. In the statement specified in number (1), notify the employees that as a condition for working on the commodities or contractual services that are under bid, the employee will abide by the terms of the statement and will notify the employer of any conviction on or plea of guilty or nolo contendere to any violation of Chapter 893, Florida Statutes or of any controlled substance law of the United States or any singular state, for a violation occurring in the workplace no later than five (5) days after such conviction.
4. Impose a sanction on, or require the satisfactory participation in a drug abuse assistance or rehabilitation program if such is available in the employee's community by any employee who is so convicted.
5. Make a good faith effort to continue to maintain a drug-free workplace through implementation of Section 287.087, Florida Statutes.

This Certification is submitted by Dr. Jeff Ling the
(Individual's Name)

Exec. Vice-President of Evergreen Solutions, LLC
(Title/Position with Company/Vendor) (Name of Company/Vendor)

Who does hereby certify that said Company/Vendor has implemented a drug-free workplace program, which meets the requirements of Section 287.087, Florida Statutes, which are identified in numbers (1) through (6) above.

8/13/18
Date

[Signature]
Signature



TOWN OF PALM BEACH

RFP No. 2018-49

COMPENSATION AND BENEFITS STUDY

LIST OF PROPOSED SUBCONTRACTORS

The undersigned bidder hereby designates, as follows, all major subcontractors whom he/she proposes to utilize for the major areas of work for the project. The bidder is further notified that all subcontractors shall be properly licensed, bondable and shall be required to furnish the TOWN with a Certificate of Insurance in accordance with the contract general conditions. Failure to furnish this information shall be grounds for rejection of the bidder's proposal. If no subcontractors are proposed, state "None" on first line below.

Name and Address of Subcontractor	Scope of Work	License #
1. N/A *		
2.		
3.		
4.		
5.		

Signature and Date

8/13/18

Title/Company

Evergreen Solutions, LLC

* Evergreen will not be utilizing any subcontractors



EVERSOL-01

TMESSER

CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

08/07/2018

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER Hub International Florida 1117 Thomasville Road Tallahassee, FL 32303	CONTACT NAME:	
	PHONE (A/C, No, Ext): (850) 386-1111	FAX (A/C, No): (850) 385-9827
INSURED Evergreen Solutions, LLC 2878 Remington Green Circle #101 Tallahassee, FL 32308	E-MAIL ADDRESS:	
	INSURER(S) AFFORDING COVERAGE	
	INSURER A: MAPFRE Insurance Company of Florida	NAIC # 34932
	INSURER B: Foremost Insurance Company Grand Rapids	11185
	INSURER C: Hartford Accident and Indemnity Company	22357
	INSURER D:	
	INSURER E:	
	INSURER F:	

COVERAGES

CERTIFICATE NUMBER:

REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:	X		CP0008008577	08/17/2017	08/17/2018	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 300,000 MED EXP (Any one person) \$ 10,000 PERSONAL & ADV INJURY \$ 0 GENERAL AGGREGATE \$ 2,000,000 PRODUCTS - COMP/OP AGG \$ Included
A	AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> HIRED AUTOS ONLY <input checked="" type="checkbox"/> NON-OWNED AUTOS ONLY			5204070000654	08/17/2017	08/17/2018	COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$
A	<input checked="" type="checkbox"/> UMBRELLA LIAB <input checked="" type="checkbox"/> OCCUR <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED <input checked="" type="checkbox"/> RETENTION \$ 10,000			42600500005902	08/17/2017	08/17/2018	EACH OCCURRENCE \$ 1,000,000 AGGREGATE \$ Aggregate \$ 1,000,000
B	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) <input type="checkbox"/> If yes, describe under DESCRIPTION OF OPERATIONS below		N/A	WC0267520710	10/24/2017	10/24/2018	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER E.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000
C	Professional Errors			21PG0258846	08/17/2017	08/17/2018	Each Claim 1,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)
Professional Liability has a \$2,000,000 Aggregate limit

CERTIFICATE HOLDER

CANCELLATION

Town of Palm Beach
951 Old Okeechobee Road
West Palm Beach, FL 33401

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE

Dr. Jeffrey Ling, CCP

Project Consultant

Evergreen Solutions, LLC

Dr. Ling's experience includes human resources, strategic planning, research methodology, and change management. He has taught courses addressing human resources, research methodology, statistical analysis, and political economy at various universities. Similarly, he has planned, organized, and managed studies on human resources assessment, and government efficiency. Each of these studies dealt with summarizing major alternatives for decision makers and providing viable recommendations.

Education / Certifications

Ph.D., Political Science, Florida State University, 1996

M.S., Political Science, Florida State University, 1993

B.A., Political Science, University of Tampa, 1990

Certified Compensation Professional (CCP), 2016

Professional and Business History

Evergreen Solutions, LLC, Executive Vice President, August 2005 – present

MGT of America, Inc., Partner, May 2004–July 2005; Principal, September 2000–April 2004; Senior Associate, November 1999–September 2000; Senior Consultant, April 1999–November 1999; Consultant, 1998–1999; Senior Analyst, May 1998–November 1998

The College of Wooster, Assistant Professor, 1997–1998

Iowa State University, Visiting Scholar, 1995–1997

Florida State University, Research Assistant, 1992–1995

Stinger Systems, Market Analyst, 1990–1992

Selected Relevant Project Experience

Florida Local Government and Public Sector Experience (He has conducted hundreds of other similar studies throughout the country)

Project Director of a Job Analysis and Description Development for the Town of Palm Beach, Florida

Project Director of a Classification, Compensation, and Benefits Study for the City of Palm Beach Gardens, Florida

Project Principal of a Classification and Compensation Study for Palm Beach County, Florida

Project Director of a Compensation Study for the City of Hollywood, Florida

Project Principal of an Executive Compensation Study for the Health Care District of Palm Beach County, Florida

Project Director of a Market Salary Survey for the Solid Waste Authority of Palm Beach County, Florida

Project Director of a Critical Classification Analysis and an Executive Compensation Analysis for the Health Care District of Palm Beach County, Florida

Project Principal of an Executive Compensation Study for the Palm Beach County Health Care District, Florida

Project Principal of a Classification and Compensation Study for the Town of Cutler Bay, Florida

Project Principal of a Compensation and Classification Study for the Town of Davie, Florida

Project Principal of a Classification and Compensation Study and Merit Pay System Development for Keys Energy Services, Florida

Project Director of a Salary Analysis for Manatee County Utility, Florida

Project Principal of a Performance Management Study for the Palm Beach County Clerk and Comptroller's Office, Florida

Project Director of a Markey Salary Study Update for Manatee County, Florida

Project Principal of a Comprehensive Classification and Compensation Study (IT positions) for Manatee County, Florida

Project Principal of a Classification and Compensation Study for the Hillsborough County Clerk of Court and Comptroller, Florida

Project Principal of a Classification and Compensation Study for Pinellas County, Florida

Project Principal of a Compensation Study for Santa Rosa County, Florida

Project Principal of a Compensation and Classification Study for Alachua County, Florida

Project Principal of a Compensation, Classification and Performance Management Study for Manatee County, Florida

Project Principal of a Compensation Study and Pay for Performance System for Clay County Sheriff's Office, Florida

Project Principal of a Compensation and Classification Study for the Alachua County Sheriff's Office, Florida

Project Principal of Job Audits for the City of Gainesville, Florida

Project Principal of a Compensation Analysis for the City of Orange City, Florida

Project Principal of a Compensation and Classification Study for the Martin County Sheriff's Office, Florida

Project Principal of a Salary Survey for Pasco County Sheriff's Office, Florida

Project Principal of a Classification and Compensation Study for Pasco County Sheriff's Office, Florida

Project Principal a Compensation Study for the Bay County Sheriff's Office, Florida

Project Principal of a Compensation Study for the Walton County Sheriff's Office, Florida

Project Principal of a Pay and Classification Study for the Lake County Sheriff's Office, Florida

Project Principal of a Compensation Study for the Manatee County Sheriff's Office, Florida

Project Principal of Compensation and Classification Systems Consulting Services for the Collier County Sheriff's Office, Florida

Project Principal of a Salary Survey for the Marion County Sheriff's Office, Florida

Project Principal of a Compensation Study for the Nassau County Sheriff's Office, Florida

Project Principal of a Human Resource Audit for the Okaloosa County Sheriff's Office, Florida

Project Principal of a Pay and Classification Study for Monroe County and Monroe County Sheriff's Office, Florida

Project Principal of a Wage, Salary, and Compensation Study for the Pinellas County Housing Authority, Florida

Project Principal of a Salary Survey for WorkNet Pinellas (d/b/a CareerSource Pinellas), Florida

Project Principal of a Compensation and Classification Study for WorkNet Pinellas, Florida

Project Principal of a Compensation Survey for CareerSource Northeast Florida

Project Principal of a Pay and Classification Study for Gulf County, Florida

Project Principal of a Classification and Compensation Study for the City of Sunny Isles Beach, Florida

Project Principal of a Salary, Benefit and Position Reclassification Study for the City of Kissimmee, Florida

Project Principal of a Salary and Benefits Study for the City of Ocala, Florida

Project Principal of a Salary, Benefit and Position Reclassification Study for the City of St. Cloud, Florida

Project Principal of a Compensation and Classification Study for the City of Bunnell, Florida

Project Principal of a Compensation Study for the City of Bushnell, Florida

Project Principal of a Compensation and Classification Study for the City of Clermont, Florida

Project Principal of a Compensation Study for the City of Winter Park, Florida

Project Principal of Classification and Compensation Services for the City of Dunedin, Florida

Project Principal of a Classification and Compensation Study for the City of Zephyrhills, Florida

Project Principal of a Job Classification Analysis for the City of St. Petersburg, Florida

Project Principal of Compensation Consultant Services for the City of Coral Springs, Florida

Project Principal of a Classification and Compensation Study for the City of Sebring, Florida

Project Principal of a Salary Study for Highlands County, Florida

Project Director of a Compensation and Classification Analysis for the City of Pinecrest, Florida

Project Principal of a Market Salary Survey for the Peace River
Manasota Regional Water Supply Authority, Florida

Project Principal of a Human Resources Performance Review for the
City of Cape Coral, Florida

Project Principal of a Compensation and Classification Study for the
City of Deltona, Florida

Project Principal of a Performance Improvement Training and Study for
the City of Destin, Florida

Project Director of a Comprehensive Compensation and Classification
Study for the City of Panama City, Florida

Project Principal of a Pay and Classification Study for the City of Fort
Walton Beach, Florida

Project Principal of a Classification, Compensation, and Staffing Study
for the City of Lake City, Florida

Project Principal of a Classification and Compensation Study for the
City of Lake City, Florida

Project Director of a Comprehensive Compensation and Benefits
Analysis for the City of Bartow, Florida

Project Principal of a Compensation Survey for the City of Tamarac,
Florida

Project Principal of a Compensation and Classification Study for the
City of Delray Beach, Florida

Project Principal of a Compensation Study for the City of Key West,
Florida

Project Principal of a Salary Survey for the City of Kissimmee, Florida

Project Principal of a Salary Survey for the City of Temple Terrace,
Florida

Project Principal of a Compensation Study for the Town of Juno Beach,
Florida

Project Principal of a Classification and Compensation Study for the
City of Sarasota, Florida

Project Principal of a Compensation Study for Sarasota County, Florida

Project Principal of Classification and Compensation Services for the
City of Dunedin, Florida

Project Principal of a Staffing, Compensation and Classification Study for the Town of Ponce Inlet, Florida

Project Principal of Salary Survey (Compensation Plan Update) for the Town of Ponce Inlet, Florida

Project Principal of a Classification, Compensation, and Benefits Study for the Town of Jupiter, Florida

Project Principal of a Classification and Compensation Study for the Village of Islamorada, Florida

Project Principal of a Compensation, Classification, and Value Engineering Analysis for City of Doral, Florida

Project Principal of a Benchmark Compensation Study for the City of Plantation, Florida

Project Principal of a Police Force Compensation and Benefits Study for the City of Doral, Florida

Project Principal of a Compensation Analysis for the City of Holmes Beach, Florida

Project Principal of a Classification and Compensation Study for the City of Ft. Myers, Florida

Project Principal of a Classification and Compensation Study for the City of Zephyrhills, Florida

Project Principal of a Classification and Compensation Study for the City of Destin, Florida

Project Principal of a Compensation Study for Lake County, Florida

Project Principal of a Classification and Compensation Study for the Health Care District of Palm Beach County, Florida

Project Principal of an Organizational Review for the Health Care District of Palm Beach County, Florida

Project Principal of a Strategic Planning Study for the Health Care District of Palm Beach County, Florida

Project Principal of a Merit Based Performance Management System for the Health Care District of Palm Beach County, Florida

Project Principal of an Employee Engagement Study for the Health Care District of Palm Beach County, Florida

Project Principal of a Compensation Study for Glades General Hospital, Florida

Project Principal of a Compensation Market Analysis for the St. Johns River Water Management District, Florida

Project Principal of a Total Compensation Study for the Southwest Florida Water Management District

Project Principal of a Salary, Benefit and Position Reclassification Study for the Toho Water Authority, Florida

Project Principal of a Pay and Classification Study for Tampa Bay Water, Florida

Project Principal of a Position and Compensation Study for the Florida Keys Aqueduct Authority

Project Principal of a Pay and Classification Study for the Florida Keys Aqueduct Authority

Project Principal of a Comprehensive Employee Study for the Ft. Pierce Housing Authority, Florida

Project Principal of a Classification and Compensation Study for the Tampa Housing Authority, Florida

Project Director of a Compensation Trends Survey and Benefits Survey for the Tampa Bay Water Authority, Florida

Project Principal of a Compensation Study for the Hillsborough Area Transit Authority, Florida

Project Principal of a Market Salary Survey for the Peace River Manasota Regional Water Supply Authority, Florida

Project Principal of a Compensation and Classification Study for the Ft. Pierce Utilities Authority, Florida

Project Principal of a Software Training Services for Seminole County, Florida

Project Principal of a Compensation and Classification Study for Seminole County, Florida

Project Principal of a Job Classification and Pay Study for Flagler County, Florida

Project Principal of a Compensation and Benefits Study for Seminole County, Florida

Project Principal of a Performance Management Study for Seminole County, Florida

Project Principal of a Compensation and Classification Study for
Gadsden County, Florida

Project Principal of a Market Salary Survey for Charlotte County,
Florida

Project Principal of a Pay and Classification Study for Martin County,
Florida

Project Principal of a Comprehensive Classification and Compensation
Study for Bay County, Florida

Project Principal of a Classification and Performance Management
System Review for Citrus County, Florida

Project Director of Management Consulting Services for Osceola
County, Florida

Project Principal of a Compensation Study for Osceola County, Florida

Project Principal of a Compensation Survey for Miami-Dade County,
Florida

Project Principal of an Employee Engagement Survey for the City of
Daytona Beach, Florida

Project Principal of a Compensation Study for the City of North Miami
Beach, Florida

Project Principal of an Employee Total Compensation Study for the
Loxahatchee River District, Florida

Project Principal of a Compensation and Classification Study for the
Orlando-Orange County Expressway Authority, Florida

Project Principal of an Emergency Management Operations Survey for
the City of Orlando, Florida

Project Principal of Human Resource Consulting Services to the City of
Orlando, Florida

Project Principal of a Pay and Classification Study for the City of Holly
Hill, Florida

Project Principal of a Classification and Compensation Study for the
City of High Springs, Florida

Project Principal of a Classification and Compensation Study for the
City of Dania Beach, Florida

Project Principal of a Compensation and Classification Study for the
City of North Port, Florida

Project Principal of a Job Classification and Compensation Study for the City of Sunrise, Florida

Project Principal of a Job Classification and Compensation Study for the City of Melbourne, Florida

Project Principal of a Classification and Compensation Study for the City of West Melbourne, Florida

Project Principal of a Compensation Study for Florida Virtual School

Project Principal of Classification and Compensation Study Services for Hillsborough Community College, Florida

Project Principal of a Compensation and Classification Study for Edison State College, Florida

Project Principal of a Compensation and Classification Study for Palm Beach State College, Florida

Project Principal of a Salary Analysis for Palm Beach State College, Florida

Project Principal of a Performance Management Study for Seminole State College, Florida

Project Principal of Compensation Consulting Services for the State College of Florida – Sarasota-Manatee

Team Leader of Information Technology Supplemental Staffing Services for Hillsborough County Public Schools, Florida

Project Principal of a Compensation and Classification Study for Brevard County Schools, Florida

Project Principal of a Districtwide Job Classification and Compensation Study for the Escambia County School District, Florida

Project Principal of a Position Classification Study of St. Lucie County Schools, Florida

Team Leader for the Human Resources Review of an Administrative Study of the Monroe County School District, Florida

Florida State Government Experience

Team Leader of an Evaluation of the Implementation of the Race to the Top Grant for the Florida Department of Education.

Project Principal of a Business Case Analysis for the Florida Department of Veteran Affairs

Project Principal of a Child Care Inspection Assessment for the Florida Department of Children and Families

Project Principal of an Affirmative Action Planning Project for the Department of Management Services, Florida

Project Principal of an Information Technology Change Management Study for the Florida Department of Business and Professional Regulation

Project Principal of a Compensation and Classification Study for the Florida State Board of Administration, Florida

Project Principal of a Human Resources Best Practices Study for the Florida Department of Management Services

Project Principal of a Statewide Human Resources Strategic Plan for the Florida Department of Management Services

Other Florida Experience

Project Principal of a Human Resources Audit for the Association for Institutional Research

Project Principal of an IT Strategic Plan for the Florida Association of Counties

Project Principal of a Compensation Study for the Florida Association of Counties

Project Principal of a Human Resources Consulting Services Study for the FACC Services Group, Florida

Project Principal of a Rate Competitiveness Assessment Study for the Florida Association of Court Clerks (FACC)

Project Principal of an Organizational Study for the Florida Clerks of Court Operations Corporation (FCCOC)

Project Principal of a Compensation and Classification Analysis for FACC

Project Director of a Pay Plan Market Value Study for the Florida Board of Bar Examiners

Project Principal of a Business Model Assessment for the Florida Institute of Certified Public Accountants, Florida

Project Principal of the Collection and Analysis of Market Data for the Confidential Office Personnel Association

Project Principal of a Compensation and Classification Plan Update for the Florida League of Cities

Project Principal of a Compensation Study for the Florida League of Cities

Project Principal of an Organizational Review for Florida Prepaid College Fund

Project Principal of a Compensation Study for the Florida Association of Counties

Project Principal of a Compensation and Classification Study for Community Action Stops Abuse (CASA), a non-profit organization dealing with domestic violence issues

Project Principal of a Pay, Compensation, and Classification Study for Community Action Stops Abuse, Florida

Employee Training to the City of Tallahassee, Florida for *Doing More with Less, Emotional Intelligence, and Goal Setting*

Employee Training for the City of Destin, Florida for *How to Conduct an Environmental Scan and Strategic Planning Facilitation*

Presentations

American Political Science Association
International Personnel Management Association
Florida State Personnel Association
Florida Professional Association for Human Resources
Florida Public Human Resources Association, Inc
National Association of State Personnel Executives
Florida Government Technology Conference
Florida Government Information Services Association
Georgia Board of Health Conference
National Association of Workforce Boards
Kansas Public Personnel Conference
Texas County Leadership Institute
Workforce Planning for the 21st Century

Ms. Nancy B. Berkley

Project Director

Evergreen Solutions, LLC

Ms. Berkley has 30 years HR experience demonstrating knowledge of multiple human resources (HR) disciplines including, recruiting and staffing, workforce planning and retention, on-boarding, compensation and benefits, employee and labor relations, employee leave administration, voluntary and in-voluntary employee separations, performance management, employee surveys, organizational design and development, organization effectiveness, employee learning, training, and development, employee records administration and retention, and awards and recognition programs. She has consistently enhanced organizational capability by integrating HR with strategic business planning, development and assessment. She has provided individualized executive coaching and led HR team development and high performance teams. She has led corporate change initiatives and built talent-rich organizations by strengthening people and integrating processes and has directed human resources in high-volume, transactional service organizations and high-level, consulting organizations. She has excellent conflict resolution, negotiation, and influencing skills.

Education	Bachelor's Degree in Psychology, Florida State University
Certifications / Memberships	SPHR (1997 - 2012); Member, Society of Human Resources Management
Professional and Business History	<p>Manager, Evergreen Solutions, Tallahassee, FL, January 2013 to Present</p> <p>Project Director of a Classification and Compensation Study for the Town of Cutler Bay, Florida</p> <p>Project Consultant of a Salary Survey for the City of Dania Beach, Florida</p> <p>Assistant Project Director of a Compensation and Classification Study for Miami Shores Village, Florida</p> <p>Project Director of a Classification and Compensation Study for the City of Delray Beach, Florida</p> <p>Project Director of a Classification, Compensation, and Benefits Study for the Town of Jupiter, Florida</p> <p>Project Director of a Compensation and Classification Study for the City of North Port, Florida</p>

Project Director of a Classification and Compensation Study for the City of Destin, Florida

Assistant Project Director of a Comprehensive Compensation and Classification Study for the City of Panama City, Florida

Project Director of Compensation Consulting Services for the Town of Longboat Key, Florida

Project Director of a Comprehensive Compensation and Classification Study for the City of Panama City Beach, Florida

Project Director of a Compensation Plan Update for the City of Panama City Beach, Florida

Project Director of a Salary Plan Update for the Flagler County Sheriff's Office, Florida

Project Director of a Classification and Compensation Study for Pasco County Sheriff's Office, Florida

Project Director of a Pay and Classification Study for the City of Fort Walton Beach, Florida

Project Director of a Compensation Study for Lake County, Florida

Project Consultant for the Collection and Analysis of Market Data for the Confidential Office Personnel Association, Florida

Project Director of a Position and Compensation Study for the Florida Keys Aqueduct Authority

Project Director of a Pay and Classification Study for the Florida Keys Aqueduct Authority

Project Director of a Compensation Update and Performance Evaluation Study for Lake County, Florida

Project Consultant for Compensation Consulting Services for the State College of FL – Sarasota-Manatee

Project Director of a Salary Survey for the School Board of Sarasota County, Florida

Assistant Project Director of a Pay Plan Market Value Study for the Florida Board of Bar Examiners

Project Director of FLSA Audits for the Southwest Florida Water Management District

Project Director of FLSA Audits and Salary Survey for the South Florida Water Management District

Project Consultant of Human Resources Consulting Services for the Orange County Library System, Florida

Project Director of a Pay and Classification Study for Martin County, Florida

Project Director of a Compensation and Classification Study for Highlands County, Florida

Project Consultant of a Compensation Study for the Village of North Palm Beach, Florida

Assistant Project Director of a Compensation Study for the City of Hollywood, Florida

Project Director of the Development of a Step Pay Plan for the Flagler County Sheriff's Office, Florida

Project Director of Job Audits for the City of Gainesville, Florida

Project Director of Compensation and Classification Study for Alachua County, Florida

Project Consultant of Compensation and Classification Study Services for Monroe County, Florida

Assistant Project Director of a Salary Equity Study for Guilford County, North Carolina

Project Director of a Position Classification and Compensation Study for Gaston County, North Carolina

Project Director of a Compensation and Classification Study for Union County, North Carolina

Project Director of a Pay and Classification Study for Buncombe County, North Carolina

Project Consultant of a Classification and Compensation Study and Benefits Survey for New Hanover County and New Hanover ABC Board, North Carolina

Project Consultant of a Classified Employment Study for Chapel Hill-Carrboro City Schools, North Carolina

Project Director of a Classification and Compensation Study for Berkeley County, South Carolina

Project Director of a Pay and Classification Study for the Town of Moncks Corner, South Carolina

Project Director of a Classification and Compensation Study for the Town of Hilton Head Island, South Carolina

Project Director of a Classification and Compensation Study for the City of Goose Creek, South Carolina

Project Director of a Comprehensive Classification, Compensation, Performance Management, and Benefits Study for the City of Columbia, South Carolina

Project Director of a Classification and Compensation Study for the Richland Library, South Carolina

Project Director of an Employee Evaluation System for the North Charleston Sewer District, South Carolina

Project Director of a Classification and Compensation Plan Review for the City of Annapolis, Maryland

Project Director of Classification and Compensation Study Services for the City of Westminster, Maryland

Project Director of a Wages and Salary Scale Study for Washington County, Maryland

Assistant Project Director of a Pay Compression Study for Allegany College of Maryland

Project Consultant of a Job Classification and Compensation Study for Chesapeake College, Maryland

Assistant Project Director of a Job Classification and Compensation Review for Morgan State University, Maryland

Project Director of a Pay and Classification Study for the City of Williamsburg, Virginia

Project Director of a Pay and Classification Study for the Isle of Wight County, Virginia

Project Director of a Compensation Study for King George County, Virginia

Project Consultant of a Classification and Compensation Study for Gloucester County, Virginia

Project Director of a Classification and Compensation Study for Essex County, Virginia

Project Consultant of a Compensation and Classification Study for Montgomery County, Virginia

Project Director of a Classification and Compensation Study for Alleghany County and the City of Covington, Virginia

Project Consultant of a Salary Scale Study for Loudoun County Public Schools, Virginia

Project Consultant of a Compensation Study for the York County School Division, Virginia

Project Consultant of a Classification and Compensation Study for Culpeper County Public Schools, Virginia

Project Consultant of a Salary Market Study and Personnel Systems Study for Virginia's Region 2000 Local Government Council

Project Director of a Compensation Analysis for the City of Alpharetta, Georgia

Project Director of a Classification and Compensation Study and Analysis for the City of Douglasville, Georgia

Project Director of a Compensation and Classification Study and Analysis for the City of Dublin, Georgia

Project Director of an Employee Classification and Compensation Study for the City of Savannah, Georgia

Project Director of a Pay and Classification Study for the City of Fayetteville, Georgia

Project Director of a Compensation and Classification Study for the City of Brookhaven, Georgia

Project Director of a Wages and Salaries Compensation Study for the City of Stockbridge, Georgia

Assistant Project Director of a Compensation Study for the City of Statesboro, Georgia

Project Director of a Comprehensive Compensation and Classification Study for the City of Tybee Island, Georgia

Project Director of a Comprehensive Classification and Compensation Study for the City of Garden City, Georgia

Project Director of a Salary and Benefits Survey for the City of Roswell, Georgia

Project Director of a Compensation and Benefits Study for Cherokee County, Georgia

Project Director of a Compensation and Benefits Study and Analysis for the City of Dahlonega, Georgia

Project Director a Classification and Compensation Study and Analysis for the City of Villa Rica, Georgia

Project Director of a Pay and Classification Study for the City of Chamblee, Georgia

Project Director of a Salary Survey for the City of Dunwoody, Georgia

Project Director of a Classification and Compensation Study and Analysis for Douglas County, Georgia

Project Director of a Job Description/Classification Study and Analysis for Douglasville-Douglas County Water and Sewer Authority, Georgia

Project Director of a Compensation and Benefits Survey for Forsyth County, Georgia

Project Director of a Classification and Compensation Study for Lumpkin County, Georgia

Project Consultant of a Performance Management Review for Morehead State University, Kentucky

Project Consultant of a Classification and Compensation Study for Sedgwick County, Kansas

Project Director of a Classification and Compensation Study for Jefferson County, Missouri

Project Director of a Compensation and Classification Study for the Central Ohio Transit Authority

Project Director of a Compensation Update for the Central Ohio Transit Authority

Project Consultant of a Comprehensive Non-Union Pay and Classification Study for the City of Evanston, Illinois

Project Director of a Classification and Compensation Study for Blount County, Tennessee

Assistant Project Director of a Compensation and Classification Study for Tuscaloosa City Schools, Alabama

Project Consultant of a Comprehensive Compensation, Classification, and Organizational Design and Structure Study for Portland Public Schools, Maine

Project Consultant of a Compensation and Classification Study for the Liberty Public School District No. 53, Missouri

Assistant Project Director of a Classification and Compensation Study for the Town of Little Elm, Texas

Project Director of a Comprehensive Compensation and Classification Study for the City of Farmers Branch, Texas

Project Director of a Comprehensive Compensation and Benefits Study for the City of Rowlett, Texas

Project Director of a Human Resources Department Assessment for the City of Buda, Texas

Project Director of a Classification and Compensation Study for the City of Pflugerville, Texas

Project Director of a Classification and Compensation Study for the City of Conroe, Texas

Project Consultant of a Classification and Compensation Study for the Lone Star College System, Texas

Project Consultant of a Job Classification and Compensation Study for El Paso Community College District, Texas

Project Consultant of a Compensation Study for South Texas College

Project Consultant of a Non-Faculty Compensation Review for Austin Community College, Texas

Project Consultant of Classification and Compensation Advisory Services for Maricopa County Community College District, Arizona

Project Director of a Classification Study and a Compensation Survey for the City of Page, Arizona

HR Director, Children's Home Society of Florida, Tallahassee, FL, June 2010-February 2012

Directed all human resources field operations for a region in Florida while ensuring efficient delivery of human resources support to include new hire orientation, staffing, workforce management, performance management, associate relations, supervisory training, and executive coaching. Built strong relationships with executive leaders and local management to provide superior, business specific human resources support. Investigated complex employee relation issues and recommended positive resolutions, followed by zero employee actions taken outside the agency.

Consultant & Healthcare Advocate, Health First Aging Institute, Merritt Island, FL, February 2009-May 2010

Developed strategy for corporate effort to increase resources for employee and community caregivers of the elderly; based on feedback from facilitated caregiver focus groups. Served as an advocate, managing health, financial, and legal matters on specific case-by-case basis for adults suffering from dementia. (Provided in-home, 24/7 care for elderly parents during this period.)

District HR Manager, The Home Depot, Lake Wales, FL, February 2007-Aug 2008

Managed, administered, and provided day-to-day human resources services for a store. Influenced positive associate relations in a

store that was experiencing low morale and numerous employee issues. Actively led strategies and modeled behavior to create an environment that rewarded and recognized individual and team success. Promoted to district manager for associate relations supporting eight-store district. Facilitated fair and consistent resolution of employee concerns across the district. Coached store leaders on effective staff management, motivation, and retention, and designed a district-wide process to improve associate attendance and engagement.

Diversity Program Manager/Senior HR Business Partner, Rockwell Collins, Cedar Rapids, IA, Oct 2005-February 2007

Strategically partnered with engineering business leaders in providing advice and guidance on HR policies, administration, organization design, change management, and team development. Trusted to design specific approach to increase teamwork in high tech leader group. Selected as corporate Diversity Program Manager to plan diversity program strategy and educate management on Equal Employment Opportunity (EEO) and Affirmative Action Plan (AAP) plans, programs, and areas for improvement. Successfully developed EEO training program for leaders across the company.

HR Senior Manager/Employee Involvement Program Manager, The Boeing Company, Kennedy Space Center, FL, July 1996-September 2005

Directed post-acquisition integration of human resources activities following McDonnell Douglas merger with Boeing. Selected to integrate six organization's human resources staff, policies, processes and practices. Recognized by senior leaders for forward thinking, flexible, integrated approach to developing teams of generalists and specialists responsible for staffing, on boarding, development, performance management, succession planning, and total compensation. Selected to utilize broadly defined employee involvement strategies to construct viable, business specific approach for Boeing employees at the Kennedy Space Center (~3000 employees.) Recognized by site leaders for facilitating a cultural shift to team-based program environment. Consulted with Boeing Leadership Center as a member of the corporate learning council. Managed various human resources and learning budgets of approximately \$1M+.

HR Senior Manager, McDonnell Douglas Corporation, Kennedy Space Center, FL, December 1980-July 1996

Progressed through increasingly responsible positions as human resources expert and business partner supporting business goals while managing teams, programs, and human resources information systems (HRIS.) Designed, implemented, and monitored the company's first job posting program. Procured and administered an applicant tracking system, and gained autonomous HRIS capability for unique business needs. Designed monitoring system for Affirmative Action Program (AAP) goal efforts. Created recruitment strategies that increased representation of women and minorities.

**Key
Achievements,
Responsibilities**

- Designed and implemented a shared service, centralized virtual staffing organization for statewide agency, increasing efficiency of staffing function for hiring managers.
- Analyzed and responded to employee relation trends; positively influenced work environments reducing employee complaints by ~90 percent.
- Consulted with senior leaders and successfully led project teams to develop new policies, programs and tools; including total revision and communication of a company's HR policies and practices to be in accordance with state and federal laws.
- Created HR metrics reviews utilizing business goals and human resources information systems data; set improvement goals and developed action plans for unique business requirements.
- Designed succession and development plans for high tech engineering leaders, and multi-level business units; compiling all data for senior executive delivery and review.
- Developed and implemented Employee Involvement (EI) (Engagement) strategy; measured its success, and applied EI tools with Lean manufacturing processes to facilitate objective results.
- Conceptualized and implemented complex workforce reduction plans; then redeployed ~50 percent of the affected employees.
- Integrated three training groups into one cohesive team; concept was replicated in other business units.
- Participated on Boeing company-wide learning council; provided unique perspective of a location site with multiple operating business units with different or competing needs.
- Represented companies in state and federal agency reviews, e.g. Office of Federal Contract Compliance Program (OFCCP) reviews, Equal Employment Opportunity Commission (EEOC) charges, workers compensation charges, and unemployment compensation claims.
- Participated on company labor negotiations teams and interpreted and implemented contract language for work performed on service contracts.

Mr. Lee Bouchelle

Project Consultant

Evergreen Solutions, LLC

Education

Master's Degree, Resource Economics, University of Florida, 1989 – 1992

- 1992 Dr. Frederick J. Prochaska Outstanding Masters Thesis Award for “An economic analysis of harvest restrictions in the North Atlantic swordfish fishery”
- Aylesworth Scholarship

Bachelor of Arts, Political Science/International Relations, University of Florida, 1986 - 1988 (Minor in Business)

Professional and Business History

Evergreen Solutions, LLC, Consultant, May 2016 - Present

Project Consultant of a Classification and Compensation Study for the City of Delray Beach, Florida

Project Consultant of a Classification and Compensation Study for the City of Holly Hill, Florida

Project Consultant of a Compensation and Classification Study for the City of North Port, Florida

Project Consultant of a Classification and Compensation Study for the City of High Springs, Florida

Project Consultant of a Job Classification and Compensation Study for the City of Sunrise, Florida

Project Consultant of a Job Classification and Compensation Study for the City of Melbourne, Florida

Project Consultant of a Classification and Compensation Study for the City of West Melbourne, Florida

Project Consultant of a Classification and Compensation Study for the City of Dania Beach, Florida

Project Consultant of a Pay and Classification Study for Monroe County, Florida

Project Consultant of a Job Classification and Pay Study for Flagler County, Florida

Project Consultant of a Compensation and Classification Study for Alachua County, Florida

Project Consultant of a Classification and Compensation Study for Gadsden County, Florida

Project Consultant of a Classification and Compensation Study for the Hillsborough County Clerk of Court and Comptroller, Florida

Project Consultant of a Pay and Classification Study for the Lake County Sheriff's Office, Florida

Project Consultant of a Classification and Compensation Study for the Pasco County Sheriff's Office, Florida

Project Consultant of a Compensation Study for the Bay County Sheriff's Office, Florida

Project Consultant of a Compensation Study for the Walton County Sheriff's Office, Florida

Project Consultant of a Compensation and Job Grading Analysis for the Jacksonville Aviation Authority, Florida

Project Consultant of FLSA Audits for the Southwest Florida Water Management District

Project Consultant of a Classification and Compensation Study for the City of Destin, Florida

Project Consultant of an IT Salary Study for the City of Miramar, Florida

Project Consultant of Compensation Consulting Services for the Town of Longboat Key, Florida

Project Consultant of a Compensation and Benefits Study for Forsyth County, Georgia

Project Consultant of a Classification and Compensation Study and Analysis for Douglas County, Georgia

Project Consultant of a Classification and Compensation Study for Lumpkin County, Georgia

Project Consultant of a Pay and Classification Study for the City of Chamblee, Georgia

Project Consultant of a Compensation Plan Update for the City of Garden City, Georgia

Project Consultant of an Employee Classification and Compensation Study for the City of Savannah, Georgia

Project Consultant of an Employee Classification and Compensation Study for Blount County, Tennessee

Project Consultant of a Classification and Compensation Plan Review for the City of Annapolis, Maryland

Project Consultant of a Wages and Salary Scale Study for Washington County, Maryland

Project Consultant of a Position Classification and Compensation Study for Gaston County, North Carolina

Project Director of a Salary and Compensation Study for Jefferson County Schools, West Virginia

Project Consultant of a Pay and Classification for the City of Williamsburg, Virginia

Project Consultant of a Classification and Compensation Study for the City of Fredericksburg, Virginia

Project Consultant of a Compensation Study for King George County, Virginia

Project Consultant of a Classification and Compensation Study for Alleghany County and the City of Covington, Virginia

Project Consultant of a Classification and Compensation Study for Berkeley County, South Carolina

Project Consultant of a Classification and Compensation Study for Dorchester County, South Carolina

Project Consultant of a Pay and Classification Study for the Town of Moncks Corner, South Carolina

Project Consultant of an Employee Compensation and Job Classification Study for the City of Conway, South Carolina

Project Consultant of a Salary Comparability Study for the Housing Authority of Florence, South Carolina

Project Consultant of a Compensation Update for the Central Ohio Transit Authority

Project Consultant of a Salary Comparability Study for the Springfield Housing Authority, Illinois

Project Consultant of a Classification and Compensation Study for Jefferson County, Missouri

Project Consultant of a Compensation and Classification Study for Clay County, Missouri

Project Consultant of a Human Resources Department Assessment for the City of Buda, Texas

Project Consultant of a Comprehensive Compensation and Classification Study for the City of Farmers Branch, Texas

Project Consultant a Classification and Compensation Study for the City of Athens, Texas

Project Consultant of a Classification Study and a Compensation Survey for the City of Page, Arizona

Project Consultant of a Job Classification and Compensation Study for the Davis School District, Utah

Project Consultant of a Job Analysis, Classification, and Compensation Study for the Ogden City School District, Utah

Consultant, ERS Group, Tallahassee, FL, April 2011 – 2015

Participated in the development of large and complex economic and statistical research projects which analyze the effects of various business practices or economic programs.

Research Associate II, ERS Group, Tallahassee, FL, December 2005 – April 2011

Collected, compiled, analyzed and interpreted data from different sources, assists in analyzing and summarizing employment data, maintains and updates data project files, and assisted in the preparation of research reports.

Senior Research Consultant, Ben Johnson Associates, Inc. Tallahassee, FL, 1995 – December 2005

Assisted with the preparation and review of expert testimony, economic cost studies, rate cases, and financial analyses in various regulated utility proceedings throughout the country. Primary Excel developer of the Telecom Economic Cost Model that was submitted to the FCC and in numerous state local exchange cost dockets. Conducted Separations studies for small rural telephone companies in Arizona and Idaho and Productivity studies of the Telecommunications industry.

Prepared discovery requests and responses and provided cross-examination assistance to clients. Designed and managed a MYSQL database and prepared SQL queries for data-driven websites.

Economic Consultant, Resource Economics Consultants, Inc., Gainesville, FL, 1993 - 1995

- Analyzed a variety of different economic issues, including contingent valuations and econometric analysis for the Indian River Lagoon National Estuary Program (funded by the SJRWMD)

in which I used an innovative modeling approach to assess fisheries impacts of water quality deterioration; and analyzed economic impacts associated with water quality programs in the Lake Okeechobee watershed for the South Florida Water Management District (SFWMD). Also analyzed the economic impacts of SFWMD water supply restrictions on municipal public utilities.

**Software
Skills**

SAS (Certified Base Programmer) , Excel (Expert user), Access, MYSQL, MS Office

Mr. Samuel Aaron Wilburn

Project Consultant

Evergreen Solutions, LLC

Education

MBA., Florida State University, Tallahassee, FL, May 2018

B.S., Civil and Environmental Engineering, Florida State University, Tallahassee, FL, May 2014

A.A., College of Central Florida, Ocala, FL, August 2009- July 2011

Professional and Business History

Evergreen Solutions, LLC, Consultant, May 2018 to present.

Project Consultant of a Salary Survey for the School Board of Sarasota County, Florida

Project Consultant of a Pay and Classification Study for the Florida Keys Aqueduct Authority

Project Consultant of a Classification and Compensation Study and Analysis for the City of Douglasville, Georgia

Project Consultant of a Compensation and Classification Study and Analysis for the City of Dublin, Georgia

Project Consultant of a Pay and Classification Study for the City of Fayetteville, Georgia

Project Consultant of a Wages and Salaries Compensation Study for the City of Stockbridge, Georgia

Project Consultant of a Compensation and Benefits Study for Cherokee County, Georgia

Project Consultant of a Classification and Compensation Study and Analysis for the City of Villa Rica, Georgia

Project Consultant of and a Salary Survey for the City of Dunwoody, Georgia

Project Consultant of a Classification and Compensation Study for the City of Conroe, Texas

Project Consultant of an Employee Evaluation System for the North Charleston Sewer District, South Carolina

Project Consultant of a Pay and Classification Study for Buncombe County, North Carolina

Project Consultant of Classification and Compensation Study Services for the City of Westminster, Maryland

**Civil/Environmental Engineer, Wilburn Construction, Inc., Inverness, FL
May 2014 - May 2018**

- Acted as Project Superintendent overseeing new construction from ground-up or remodel jobs. Created draft detailed construction drawings with full sets of residential and commercial floor plans, and site/civil drawings projects including drainage and land grading.
- Performed drainage calculations for appropriate size and location of retention ponds.
- Coordinated and consulted with customers on design, layout and/or detail components.

Intern, FSU Friends of Internationals, May - August 2013

- Planned and coordinated social activities, events, and conversation partners for international students.
- Organized grocery-related transportation schedule for international students.

Draftsman, Wilburn Construction, Inc., Inverness, FL, August 2008 – July 2011

- Prepared detailed drawings for floor plans, elevations, sections and details.
- Developed skills for framing, plumbing, drywall, demolition, site work and grading.

**Proactive/
Volunteer
Experience**

Assistant Coach, Inverness Little League, Inverness, FL, February 2017- May 2017

- Helped head coach with weekly games and practices for co-ed Rookie League baseball team (ages 6-8).

Personnel Team Member, Cornerstone Baptist Church, Inverness, FL, May 2016- May 2017

- Assisted in interviewing and hiring process of new Youth Minister and new Children's Director.

Sunday School Teacher, Cornerstone Baptist Church, Inverness, FL,
March 2015-May 2017

- Grew weekly attendance from 2 to 27 for College/Young Adult class over 2 years.
- Community service, Dedicated 400+ hours towards natural disaster relief, child daycares and orphanages, senior nursing homes, and poverty-stricken areas including, but not limited to the following mission trips:
- Mission Fuge; Charleston, SC and West Palm Beach, FL (Trip Leader), June 2007, June 2016
- Kids International Ministries; Cointa, Philippines, July 2015
- World Changers; New Orleans, LA and Juana Diaz, Puerto Rico July 2007, June 2008

Academic Clubs

MBA Association (MBAA), Vice President, Florida State University, Summer 2017

Baptist Collegiate Ministry (BCM), Florida State University, Fall 2011 - Spring 2014

Positions held: Treasurer, Facilitator, Garnet and Gold Guys, FSU State-wide Student Representative

Physics, Calculus, and Engineering Club (PCE), Member, College of Central Florida, Fall 2010 - Summer 2011

Licenses/Skills

Certified Building Contractor- FL License Number: CBC1261786

Engineering Intern (E.I.)- FL License Number: 1100019046, August 2008 - July 2011

Proficient in Microsoft Word, Excel, PowerPoint, AutoCAD, Autodesk Inventor, Modret, ProPresenter, QuickBooks

Experienced Excavator and Tractor Operator

Eric C. McMillan

Project Consultant

Evergreen Solutions, LLC

Education	B.S in Accounting and Marketing, Florida State University, 2016
Professional and Business History	<p>Evergreen Solutions, LLC, Senior Analyst, May 2018 to Present; Analyst, June 2017 to May 2018; Data Analyst, April 2016 – June 2017.</p> <p>Project Consultant of a Pay and Classification Study for the City of Chamblee, Georgia</p> <p>Project Consultant of a Comprehensive Classification and Compensation Study for the City of Garden City, Georgia</p> <p>Project Consultant of a Wages and Salaries Compensation Study for the City of Stockbridge, Georgia</p> <p>Project Consultant of a Compensation and Classification Study and Analysis for the City of Dublin, Georgia</p> <p>Project Consultant of a Pay and Classification Study for the City of Fayetteville, Georgia</p> <p>Project Consultant of a Salary Survey for the City of Dunwoody, Georgia</p> <p>Project Consultant of a Classification and Compensation Study for Lumpkin County, Georgia</p> <p>Project Consultant of a Classification and Compensation Study and Analysis for Douglas County, Georgia</p> <p>Project Consultant of a Compensation and Benefits Study for Cherokee County, Georgia</p> <p>Project Consultant of a Job Description/Classification Study and Analysis for Douglasville-Douglas County Water and Sewer Authority, Georgia</p> <p>Project Consultant of a Classification and Compensation Study for Alleghany County and the City of Covington, Virginia</p> <p>Project Consultant of a Pay and Classification Study for the City of Williamsburg, Virginia</p> <p>Project Consultant of a Classification and Compensation Study for the City of Fredericksburg, Virginia</p>

Project Consultant of a Compensation Study for King George County, Virginia

Project Consultant of a Classification and Compensation Plan Review for the City of Annapolis, Maryland

Project Consultant of a Wages and Salary Scale Study for Washington County, Maryland

Project Consultant of a Position Classification and Compensation Study for Gaston County, North Carolina

Project Consultant of a Compensation and Classification Study for Union County, North Carolina

Project Consultant of a Pay and Classification Study for the Town of Moncks Corner, South Carolina

Project Consultant of a Classification and Compensation Study for the City of Goose Creek, South Carolina

Project Consultant of a Classification and Compensation Study for Berkeley County, South Carolina

Project Consultant of a Classification and Compensation Study for Blount County, Tennessee

Project Consultant of a Human Resources Department Assessment for the City of Buda, Texas

Project Consultant of a Comprehensive Compensation and Classification Study for the City of Farmers Branch, Texas

Project Consultant of a Classification Study and a Compensation Survey for the City of Page, Arizona

Project Consultant of a Classification and Compensation Study for the City of Conroe, Texas

Project Consultant of a Classification and Compensation Study for Jefferson County, Missouri

Mark Carr CPA 's & Associates, Accountant, February 2015 - May 2016

- Completed over 50 individual/business income tax returns
- Performed bookkeeping/bank reconciliations monthly using QuickBooks
- Prepared financial statements such as Income Statements and Balance Sheets

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- Completed Payroll, 940s, 941s, and Form RT-6 reports using CFS software

**Florida State University, Systems Representative, Financial Aid Office,
May 2014 - Present**

- Fix software, hardware, and networking issues with all PC's/printers
- Report network issues including, access port, wireless network, etc.
- Create and design Excel workbook projects for budget purposes during financial aid fiscal years

Wal-Mart, Tallahassee, FL, Deli Associate, March 2014-March 2015

- Managed inventory counts as well as restocking products
- Performed cost inventory at the end of every month

Aramark, Tallahassee, FL, Cashier, September 2011 - May 2012

- Counted drawers at the end of every game as well as calculated debit/credit transactions and handled money efficiently
- Effectively totaled sales/costs and calculated net profit after each game
- Transported money to drop office

**Professional
Skills Profile**

- Coursework in Financial Management
- Effective Communication Abilities
- Experienced with Computer Software/Networking
- Budget Proposal Experience
- Proficient with QuickBooks
- Cost Inventory Experience

Affiliations

- Member, Minority Business Society, Florida State University
May 2013 - Present
- Member, National Association Black Accountants, Florida
State University July 2013 - Present