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June 28, 2021

Board of Directors
Triunfo Water & Sanitation District
Ventura County, California

APPROVAL OF HR CONSULTING FIRM CONTRACT FOR CLASSIFICATION AND COMPENSATION STUDY

Summary

At the April 26, 2021 Triunfo Water & Sanitation District's (District) Board Meeting, as part 2 of the District's plan to sever its contractual relationship with Ventura Regional Sanitation District (VRSD), the Board requested that staff move forward with transitioning the water/wastewater field services from VRSD to a hybrid structure which includes outside contracting and District in-house staffing of certain key positions. To facilitate the new staff positions, and complete the transition by June 30, 2022, it is necessary for the District to supplement the initial Koff and Associates (now Gallagher Benefit Services, Inc.) job classifications and wage determinations study (Classification and Compensation, C&C) prior to soliciting potential employees for employment. Staff identified five (5) positions that would be needed to operate under the hybrid operational structure and include; Accounting Assistant, Operations Manager, Water/Wastewater Worker, Water/Wastewater Senior Worker, and Environmental Resource Analyst.

Given the previous C&C work performed by Gallagher for the Core Management and Finance groups in July 2020, and with reference to the extensive comparators utilized, staff solicited a proposal from Gallagher to complete the supplemental C&C study for the new positions. Gallagher provided a cost proposal of \$22,320 and a 12-week schedule. Staff has reviewed Gallagher's proposal and considers it a reasonable and cost-effective approach. Staff recommends that the Board approve a contract with Gallagher Benefit Services, Inc. for the 5 new worker classifications for a contract amount of \$22,320.

Please contact me at (805) 658-4621 or marknorris@triunfowsd.com if you have any questions.


Fiscal Impact

These services are included in the Proposed FY 2021-22 Budget.

Recommendation

It is recommended that the Board approve the 5 classifications study with Gallagher Benefit Services, Inc. and approve the Chair to sign a contract with the HR consulting firm in the amount of \$23,320, or provide staff with alternative direction.

REVIEWED AND APPROVED:



Mark Norris - General Manager

Attachment: TWSD Contract No. T21-002 (5 classifications)

CONTRACT NO. T21-002

**AGREEMENT FOR CONSULTING SERVICES
BETWEEN
TRIUNFO WATER & SANITATION DISTRICT
AND
GALLAGHER BENEFIT SERVICES, INC.**

**FOR CONSULTING SERVICES FOR A
CLASSIFICATION AND COMPENSATION STUDY**

THIS AGREEMENT is made and entered into this 28th day of June 2021, by and between the TRIUNFO WATER & SANITATION DISTRICT, a public agency formed pursuant to California Health & Safety Code Section 4700 et seq., hereinafter “DISTRICT,” and GALLAGHER BENEFIT SERVICES, INC., a Delaware corporation, hereinafter “CONSULTANT.” Together, DISTRICT and CONSULTANT shall be referred to herein as Parties.

RECITALS

A. DISTRICT has the need to engage the specialized services of a consultant to prepare a classification and compensation study for specific District positions.

B. DISTRICT has selected CONSULTANT, as most qualified, based on CONSULTANT’s recent experience with the DISTRICT on the Classification and Compensation Study for the core management/finance group.

C. CONSULTANT represents it possesses the necessary skills and experience to perform the required services and is willing to contract with DISTRICT.

D. The parties enter into this Agreement to set forth their respective rights and obligations.

AGREEMENT

ARTICLE 1: WORK STATEMENT

A. CONSULTANT shall provide consulting services for DISTRICT in regard to preparation of a classification and compensation study for the DISTRICT’s operations group, hereinafter referred to as the “Project,” as described in the document entitled “Scope of Work” attached as Exhibit “A” and incorporated by reference herein.

B. CONSULTANT shall designate a representative who shall represent CONSULTANT and be its sole contact and agent in all consultations with DISTRICT during fulfillment of the terms of this Agreement. CONSULTANT’s representative shall be Georg Krammer, Project Manager. In the event PM Georg Krammer becomes unavailable, CONSULTANT shall immediately designate another representative satisfactory to DISTRICT. CONSULTANT shall use its best efforts in providing services to DISTRICT and shall cooperate with DISTRICT and provide DISTRICT with all available information and assistance in relation to the Project.

C. DISTRICT shall assign a Staff Coordinator to work directly with CONSULTANT in connection

with CONSULTANT's services to be performed under this Agreement.

D. A working budget is included in Exhibit "A" and incorporated by reference herein. CONSULTANT shall complete work tasks within the budget of Exhibit "A".

ARTICLE 2: TERM OF CONTRACT

Unless otherwise earlier terminated, this Agreement shall continue in force until the services specified herein have been fully performed. Upon execution of this Agreement by both parties, CONSULTANT shall diligently pursue work to assure completion on a timely basis. Unless otherwise extended in writing by both parties, this contract shall automatically terminate on June 30, 2022.

ARTICLE 3: INDEPENDENT CONTRACTOR RELATIONSHIP

A. It is expressly understood between the parties that no employee/employer relationship is intended, the relationship of CONSULTANT to DISTRICT being that of an independent contractor. DISTRICT shall not be required to make any payroll deductions or provide Workers' Compensation Insurance coverage or health benefits to CONSULTANT.

B. CONSULTANT is solely responsible for selecting the means, methods, and procedures for performing its services hereunder as assigned by DISTRICT and for coordinating all portions of the work so the results will be satisfactory to DISTRICT, but shall not be responsible for the means, methods, and procedures of other consultants. CONSULTANT will supply all tools and instrumentalities required to perform its services under this Agreement.

C. CONSULTANT, pursuant to this Agreement, is rendering professional services only and any payments made to it are compensation solely for such services as it may render and recommendations it may make in the performance of services.

ARTICLE 4: COMPLIANCE WITH LAWS

CONSULTANT shall be solely responsible for giving all notices and complying with all applicable laws, ordinances, rules, regulations, and lawful orders of any public authority relating to CONSULTANT's work, the safety of the persons or property involved, and their protection from damage or injury. CONSULTANT shall defend, indemnify, and hold DISTRICT harmless from and against all claims, demands, payments, suits, actions, proceedings, and judgments of every nature and description, including attorneys' fees and costs, brought or recovered against DISTRICT, for or on account of any grossly negligent violation of said laws, ordinances, rules, regulations, and orders in connection with work performed by CONSULTANT under this Agreement.

ARTICLE 5: CONFIDENTIAL RELATIONSHIP/TITLE TO DOCUMENTS

CONSULTANT agrees that all dealings of the parties under this Agreement shall be confidential and no report, data, information, or communication developed, prepared, or assembled by CONSULTANT under this Agreement, or any information made available to CONSULTANT by DISTRICT, shall be revealed, disseminated, or made available by CONSULTANT to any person or entity other than DISTRICT without the prior written consent of DISTRICT. All data, calculations, drawings, and other documents developed, prepared, completed, or acquired by CONSULTANT during the performance of its services hereunder shall be turned over to DISTRICT upon termination of this Agreement. However, CONSULTANT may retain copies of its work product that contain confidential information for archival purposes or to defend its work product, and in accordance with legal disaster recovery and records retention

requirements, store such copies and derivative works in an archival format (e.g. tape backups), provided that the information will remain confidential as long as it is retained.

ARTICLE 6: PAYMENT TO CONSULTANT

A. In consideration of CONSULTANT's performance of services as described herein, DISTRICT shall pay CONSULTANT fees for its services according to the Cost Proposal set forth in Exhibit "A" attached and incorporated by reference herein. On or prior to the tenth (10th) day of each calendar month after actual work is started, CONSULTANT shall submit an invoice in sufficient detail to show the total amount of work done and materials furnished by CONSULTANT and incorporated into the work to the last day of the month preceding the one in which the invoice is submitted. Such invoice shall include the name and title of each person performing work, date and brief description of the work performed, number and type of hours worked, and labor rate. DISTRICT shall review and approve CONSULTANT's invoice for accuracy and agree with CONSULTANT on any adjustments that may be appropriate. Such approvals shall not be unreasonably withheld. DISTRICT shall pay CONSULTANT for all approved work and materials within thirty (30) days of agreement on the amount of the invoice. In the event of disagreement with CONSULTANT on adjustments or disallowances, said amounts and disputes shall be withheld until resolved. Upon resolution of the disagreements, payment of the approved amount shall be made within thirty (30) days after deducting therefrom all previous payments and all sums to be retained under the terms of the agreement.

B. Total fees to be paid by DISTRICT to CONSULTANT for CONSULTANT's services described herein shall not exceed \$22,320. Additional services requested outside the scope of this Agreement would require written amendment hereto.

C. No payment made under this Agreement, except the final payment, shall be conclusive evidence of CONSULTANT's performance of the Agreement, either wholly or in part, and no payment shall be construed to be an acceptance of CONSULTANT's services performed. DISTRICT shall provide CONSULTANT with written documentation of completion of work along with final payment.

ARTICLE 7: MODIFICATION

No change to Exhibit "A" hereto, or to any other provision of this Agreement, may be made except by a written amendment signed by CONSULTANT and DISTRICT. DISTRICT General Manager or his designee shall be authorized to approve changes to this Agreement in a manner consistent with the provisions of District Resolution No. 89-13. Each amendment for additional services shall not exceed ten (10) percent or \$10,000, and the aggregate total of the original contract and all amendments shall not exceed \$25,000 without Board approval.

ARTICLE 8: SUSPENSION OR TERMINATION OF CONTRACT

All work shall be done in a diligent and professional manner to DISTRICT's satisfaction. CONSULTANT specifically acknowledges and agrees that DISTRICT may suspend or terminate CONSULTANT's services at any time with or without cause, regardless of whether CONSULTANT's services or the Project are completed. Any termination or any special instructions hereunder from DISTRICT shall be made in writing at least ten (10) days in advance of the termination. In the event of such termination or suspension exceeding three (3) months, CONSULTANT shall have the right to expend additional time to assemble the work in progress for the particular section of work for the purpose of proper filing and closing the job. Such additional time shall not exceed ten (10) percent of the total time expended on the section or sections of work suspended at and to the date of the notice of suspension or termination, and shall not increase CONSULTANT's total compensation beyond the maximum stated in Article 6.

In the event suspension of services exceeds twelve (12) months in duration, CONSULTANT may, by not less than thirty (30) days' written notice, terminate the services as they apply to the suspended portion of the project. In the event this Agreement is terminated by either DISTRICT or CONSULTANT, all reports, specifications and appurtenant data shall be delivered by CONSULTANT to DISTRICT and may be used by DISTRICT.

ARTICLE 9: INDEMNIFICATION AND HOLD HARMLESS

CONSULTANT agrees to defend, indemnify, and hold harmless DISTRICT and its officers, agents, and employees, from and against any and all liability, damages, costs, losses, claims, and expenses, however caused, resulting directly from or connected with CONSULTANT's negligent performance of this Agreement (including, but not limited to, such liability, cost, damage, loss, claim, or expense arising from the death of or injury to, or damage to property of CONSULTANT, DISTRICT, or their respective employees or agents), except to the extent that such liability, damages, costs, losses, claims, or expenses are caused by the negligent or wrongful acts or omissions of DISTRICT or any of its agents or employees.

ARTICLE 10: INSURANCE

CONSULTANT shall provide and keep in effect during the term of this Agreement insurance as follows:

- A. Workers' Compensation and Employer's Liability in accordance with applicable laws.
- B. Comprehensive Commercial Liability policies with combined single limit coverage of not less than \$1,000,000 for any personal injury, death, or property damage.
- C. Comprehensive Automobile Liability policies with combined single limit coverage of not less than \$1,000,000 for personal injury, death, or property damage.
- D. Errors and Omissions coverage with minimum limits of \$1,000,000 in full force and effect during the life of this contract.

CONSULTANT shall provide certificates of such insurance to DISTRICT prior to the start of work. Said certificates shall specifically provide that: (1) DISTRICT is an additional insured for the coverage in Item B above; (2) any other insurance coverage applicable to the loss shall be deemed excess coverage and CONSULTANT's insurance shall be primary for the coverage in Item B above; (3) in the event of CONSULTANT's error or omission, CONSULTANT's insurance shall respond for the coverage in Item D above; and (4) any cancelled or non-renewed policy will be replaced with no coverage gap and a current Certificate of Insurance will be provided to the DISTRICT.

ARTICLE 11: SUBCONTRACTORS

This Agreement is a personal service contract, and the consulting work hereunder shall not be delegated or assigned by CONSULTANT to any person or entity without the consent of DISTRICT. Breach of this provision shall be grounds for immediate termination of this Agreement.

ARTICLE 12: AUTHORITY TO EXECUTE CONTRACT

Both DISTRICT and CONSULTANT do covenant that each individual executing this Agreement on behalf of each party is a person duly authorized and empowered to execute Agreements for such party.

ARTICLE 13: DISPUTE RESOLUTION

In the event that CONSULTANT and DISTRICT have a dispute concerning the payment of sums pursuant to their Contract, the parties agree to be governed by Public Contracts Code Section 20104 et seq. In the event of such dispute, CONSULTANT shall file a written claim with DISTRICT. DISTRICT shall respond in writing within forty-five (45) days, or, within thirty (30) days request additional documentation and respond within fifteen (15) days after said request.

ARTICLE 14: NOTICES

All notices or other official correspondence relating to contractual matters between the parties shall be made by depositing the same as first-class, postage-paid mail addressed as follows:

To CONSULTANT: Georg Krammer
GALLAGHER BENEFIT SERVICES, INC.
2835 Seventh Street
Berkeley, CA 94710

To DISTRICT: Finance & Administration
TRIUNFO WATER & SANITATION DISTRICT
1001 Partridge Drive, Suite 100
Ventura, CA 93003-0704

or to such other address as either party may designate hereinafter in writing delivered to the other party. All notices shall be deemed to have been received three (3) days after mailing.

ARTICLE 15: NO WAIVER

No failure or delay by DISTRICT in asserting any of DISTRICT's rights and remedies as to any default of CONSULTANT shall operate as a waiver of the default, of any subsequent or other default by CONSULTANT, or of any of DISTRICT's rights or remedies. No such delay shall deprive DISTRICT of its right to institute and maintain any action or proceeding which may be necessary to protect, assert, or enforce any rights or remedies arising out of this Agreement or the performance of this Agreement.

ARTICLE 16: PARTIAL INVALIDITY

If any term, covenant, condition, or provision of this Agreement is found by a court of competent jurisdiction to be invalid, void, or unenforceable, the remainder of the provisions hereof shall remain in full force and effect, and shall in no way be affected, impaired, or invalidated thereby.

ARTICLE 17: TERMS

No alteration or variation of the terms of this Agreement shall be valid unless made in writing and signed by the parties. No oral understanding or agreement not incorporated herein shall be binding on any of the parties.

ARTICLE 18: INCORPORATION OF RECITALS

The foregoing recitals are incorporated herein as though fully set forth.

ARTICLE 19: CALIFORNIA LAW

This Agreement shall be interpreted and construed pursuant to the laws of the State of California. The parties agree that should litigation arising from this Agreement be commenced within California, such litigation shall occur within a court of competent jurisdiction within the County of Ventura.

ARTICLE 20: EXECUTION IN COUNTERPARTS

This Agreement and any amendments hereto may be executed in any number of counterparts, each of which when so executed and delivered shall be deemed to be an original, but all such counterparts shall constitute one and the same Agreement, as may be amended from time to time. Delivery of an executed counterpart of a signature page to this Agreement by facsimile, PDF or other electronic means shall have the same impact and effect as original counterparts and shall be valid, enforceable and binding.

ARTICLE 21: ADDITIONAL PROVISIONS

CONSULTANT agrees that no regular employee of DISTRICT shall be employed by its firm during the period that this Agreement is in effect.

IN WITNESS WHEREOF, the parties hereto have executed this agreement the day and year first above written.

TRIUNFO WATER & SANITATION DISTRICT

GALLAGHER BENEFIT SERVICES, INC.

By _____
RAY TULANDER
Chair, Board of Directors

By _____
GEORG KRAMMER
MANAGING DIRECTOR

APPROVED AS TO FORM:
ARNOLD, LaROCHELLE, MATHEWS,
VANCONAS & ZIRBEL, LLP

By _____
JOHN M. MATHEWS
Legal Counsel for DISTRICT

ATTEST:

By _____
JULIET RODRIGUEZ
Clerk of the Board

EXHIBIT A

Scope of Work

Submittal date: April 27, 2021

Classification and
Compensation Study
Scope of Work
(Five Classifications)

Triunfo Water & Sanitation District

GEORG S. KRAMMER

Managing Director
2835 Seventh Street
Berkeley, CA 94710

Tel: 510.658.5633

Fax: 510.652.5633

METHODOLOGY / SCOPE OF WORK / DELIVERABLES

Classification and Total Compensation Studies for five classifications: Accounting Assistant, Operations Manager, Water/Wastewater Worker, Water/Wastewater Senior Worker, Environmental Resource Analyst.

PHASE I – CLASSIFICATION

Following are the typical steps we undergo in order to conduct a comprehensive assessment of a classification system, including reviewing/analyzing class descriptions, updating class descriptions as needed, ensuring FLSA, ADA, EEO compliance, etc.:

Deliverable A. Meetings with Management Staff for Initial Document Review

- Identify client project team, contract administrator, and reporting relationships.
- Orientation and briefing sessions with the study project team and staff to explain methodology.
- Gather all pertinent documentation, including any relevant organizational information.
- Review and agree to the position description questionnaire (“PDQ”), a class description format, comparator agencies, benchmark classifications, and benefits to be collected.

Deliverable B. Orientation Meetings with incumbents and Distribution of PDQs

- Design and discuss PDQ with the project team in order to customize it to meet study objectives.
- Facilitate an orientation meeting for all study participants and distribute the PDQ, begin the educational process that continues throughout the study, discuss the importance of employees’ involvement; elements that are not a part of the study will also be covered.

Deliverable C. Collection and Review of PDQs

- Employees complete PDQs and their supervisor/manager will review, comment, and sign off on it.
- For each new and unfilled position, either contractors who are already doing the work, the GM or other managers could complete a PDQ for that position
- K&A will review and analyze PDQs in detail along with other documentation.

Deliverable D. Interviews with Incumbents

- Interviews will be scheduled with all employees.
- For each new and unfilled position, K&A will interview contractors who are already doing the work, the GM or other managers regarding that position.
- The purpose of the interviews is to clarify and supplement the PDQ data and to respond to potential perception differences regarding roles, tasks, scope, and supervisory responsibilities.

Deliverable E. Classification Concept & Preliminary Allocation

- K&A’s job evaluation will result in classification allocation recommendations that will be submitted to project team for review and approval.
- Utilize the “whole position” classification methodology, including education, experience, problem solving/ingenuity, attention/stress, independence of action/responsibility, contacts with others, supervision exercised, consequence of action/decisions.

- Classification-specific class concept recommendation for each studied position will be prepared, specifying current and proposed classification title.
- Meet with the project team and management staff to review the proposed recommendations to the classifications being studied based on industry best practices and roles and responsibilities; provide the recommendation to employee representation for review.

Deliverable F. Draft Class Description Development

- Class descriptions will be developed for each proposed classification, including duties, responsibilities, and minimum qualifications of each class specification.
- Review, analyze, and develop knowledge, skills, abilities, education and experience, relevance and hierarchical consistency, position definitions, purpose, distinguishing characteristics, supervision received/exercised, position functions and special requirements, including licensing and certifications.
- Determine exempt vs. non-exempt status in accordance with “white collar” exemptions under the Fair Labor Standards Act (“FLSA”) and ensure compliance with the Americans with Disabilities Act (“ADA”).

Deliverable G. Facilitation of Draft Class Description Review and Informal Appeals Support

- Submit new/updated classification descriptions to the District for review and discussion to ensure that no factual information is overlooked and that the recommendations are fair and consistent.
- Class description changes will be made as required and the class specifications will be finalized and submitted for approval.

Deliverable H. Classification Plan and Draft of Interim Report and Final Report

- Develop Final Report of the Classification Study for final review and comment.
- The Report will contain: documentation regarding study goals and objectives, classification methodology, approach, and process; all findings, analysis, and resulting recommendations; recommended allocation list, classification recommendations, and other factors.
- Once we have received the District’s comments regarding the Final Report and have made any necessary changes, a Final Classification Report will be developed.

PHASE II -- COMPENSATION

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

- Survey same comparator agencies as in the most recent study:
 - Camrosa Water District
 - Casitas Municipal Water District
 - City of Agoura Hills
 - City of Thousand Oaks
 - City of Westlake Village
 - El Toro Water District
 - Goleta Sanitary District
 - Goleta Water District
 - Las Virgenes Municipal Water District
 - Rowland Water District
 - Ventura Regional Sanitation District

- Yorba Linda Water District
- Confirm classifications to be studied (i.e., all).
- Confirm benefits to be collected.

Deliverable B. Data from Competitors

- K&A to conduct all of the data collection and analysis to ensure validity of data and quality control; compare job description to job description; ensure matches of at least 70%.
- Review the class descriptions developed in Phase I of the study to ensure understanding of each position to be surveyed.
- Collect job descriptions, organization charts, and other information from comparator agencies via website, in person, or by telephone.
- Make preliminary “matches” using “whole position methodology” and then schedule appointments by telephone, and sometimes in person, with knowledgeable individuals to answer specific questions. Our “whole position methodology” includes factors such as education, experience, problem solving, supervision exercised, etc.
- Ensure a very high validity rate and produce data that is substantiated before management as well as governing bodies.

Deliverable C. Analysis and Preliminary Review of Data

- Enter data into spreadsheet format designed for ease of interpretation and use.
- Present information in a format that will identify the comparator positions used for each class comparison.
- Calculate information based upon average and median figures, allowing the District to make informed compensation decisions.

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

- Distribute draft findings to the District.
- After the District’s preliminary review, meet with the stakeholders to clarify data, receive requests for reanalysis of certain comparators; and answer questions and address concerns.
- If questions arise, conduct follow-up analysis to reconfirm original analysis and/or make corrections.

Deliverable E. Analysis of Internal Relationships and Alignment

- Determine internal equity for all positions.
- Develop internal position hierarchy based on the “whole position” classification methodology which we use to do the internal alignment.
- Make recommendations regarding vertical salary differentials across the organization.

Deliverable F. Compensation Structure and Implementation Plan

- Review and make recommendations regarding internal alignment and salary structure within which classifications are allocated, based upon the District’s preferred compensation plan.
- Discuss draft recommendations with management team prior to developing Interim Report.

Deliverable G. Final Report and Guidelines for Implementation

- Complete Draft Report and submit to the District for review, comment, and recommendations, including detailed compensation findings and recommendations; proposed salary ranges, and implementation issues; methodology for continued implementation and maintenance of recommendations.
- After the District's questions/concerns are addressed and discussed, create Final Compensation Report.

Deliverable H. Final Presentation to the Board of Directors

- Our proposal includes one initial overview, one interim study session (to discuss the initial findings of the market salary study), and one final presentation to the Board of Directors, as needed.

TIMELINE

Our professional experience is that classification and compensation studies of this scope and for this size organization take approximately three months to complete, allowing for adequate PDQ completion, interview time, classification description review and/or development, compensation data collection and analysis, review steps by the District, the development of final reports, any appeals, meetings, and presentations.

Following is a suggested timeline (which can be modified based on the District's needs):

Deliverables	Classification Study	Completion by:
A.	Meetings with Management Staff for Initial Documentation Review	Week 1
B.	Orientation Meetings with Incumbents and Distribution of PDQ	Week 1
C.	Collection and Review of PDQs	Week 5
D.	Interviews with Incumbents	Week 6
E.	Classification Concept & Preliminary Allocation	Week 7
F.	Draft Class Description Development	Week 8
G.	Facilitation of Draft Class Description Review and Informal Appeals Support	Week 9
H.	Classification Plan and Draft of Interim Report and Final Report	Week 10
Deliverables	Total Compensation Study	Completion by:
A.	List of Comparator Agencies, Classifications, and Benefits to be Collected	Week 1
B.	Data from Comparators	Week 8
C.	Analysis and Preliminary Review of Data	Week 9
D.	Draft Compensation Findings/Additional Analysis/Study Project Team Meetings	Week 10
E.	Analysis of Internal Relationships and Alignment	Week 11
F.	Compensation Structure and Implementation Plan	Week 11
G.	Final Report and Guidelines for Implementation	Week 12
H.	Final Presentation to the Board of Directors	As Scheduled

COST PROPOSAL

Classification and Total Compensation Studies for five classifications: Accounting Assistant, Operations Manager, Water/Wastewater Worker, Water/Wastewater Senior Worker, Environmental Resource Analyst.

Please note: for small studies such as this, it is often challenging to estimate the hours; of course, we will only bill for actual hours worked and this study may take fewer hours than our best estimate below.

Deliverables	Classification Study	Hours
A.	Meetings with Management Staff for Initial Documentation Review	2
B.	Orientation Meetings with Incumbents and Distribution of PDQ	2
C.	Collection and Review of PDQs	4
D.	Interviews with Incumbents (this assumes phone or video interviews)	6
E.	Classification Concept & Preliminary Allocation	3
F.	Draft Class Description Development (up to 4)	15
G.	Facilitation of Draft Class Description Review and Informal Appeals Support	4
H.	Classification Plan and Draft of Interim Report and Final Report	10
	Total Professional Hours - Classification	46
	Combined professional and clerical composite rate: \$155/ Hour	\$7,130
Deliverables	Total Compensation Study	Hours
A.	List of Comparator Agencies, Classifications, and Benefits to be Collected	2
B.	Data from Comparators	38
C.	Analysis and Preliminary Review of Data	16
D.	Draft Compensation Findings/Additional Analysis/Study Project Team Meetings (this assumes a conference or video call)	9
E.	Analysis of Internal Relationships and Alignment	3
F.	Compensation Structure and Implementation Plan	4
G.	Final Report and Guidelines for Implementation	10
H.	Final Presentation to the Board of Directors (this assumes a presentation to the Board of Directors onsite at District offices)	12
	<i>Anticipated hours for additional unscheduled meetings and phone calls</i>	4
	Total Professional Hours - Compensation	98
	Combined professional and clerical composite rate: \$155/Hour	\$15,190
	Expenses are included in the composite hourly rate:	N/A
	<i>Expenses include but are not limited to duplicating documents, binding reports, phone, supplies, postage, parking, meals, travel time, etc.</i>	
	TOTAL PROJECT COST NOT TO EXCEED:	\$22,320
	<i>*Additional consulting will be honored at composite rate (\$155/hour)</i>	