



REQUEST FOR PROPOSAL Compensation Study and Employee Classification Plan 2020-14

Submittal Date: 3:00 p.m., Wednesday, November 25, 2020

INTRODUCTION

City of Edgerton is seeking proposals for a comprehensive compensation or “market” study. The pricing for additional Employee Classification Plan development work will be considered as an alternative to the base market study.

PURPOSE AND OBJECTIVES

The objective of the market-based compensation analysis is to ensure Edgerton maintains a competitive standing with relation to other municipal entities sector labor markets.

SCOPE OF WORK FOR COMPENSATION SURVEY

In regard to the compensation survey project the consultant is to:

1. Use the list of benchmark classifications listed in Appendix 1 to survey public sector employers.
2. Identify and work with City staff to develop a list of factors and their weighting to determine comparability with Edgerton. Factors may include population, proximity, equalized tax rate, per capita equalized value; household income, number of FTEs (regular not seasonal), and average of net new construction increase over the last five years.
3. Identify and review with City staff at least 12 Wisconsin municipalities within the State of Wisconsin that are comparable to Edgerton on the selected factors. Conduct salary survey and provide information on minimum, mid-point, maximum, and actual wages for each benchmark position. To provide analysis on comparability to each community, compiled data should include actual title used, years of experience in the position, and number of people supervised (full-time equivalent), if appropriate. Gather organizational

charts for comparable communities when possible. Gather information about total number of FTEs, titles of all FTEs, and total number of FTEs in each position.

4. Conduct a survey of benefits and how costs of the benefits are allocated to include at least the following: health, dental, vision, and life insurance; retirement; time off (sick, holiday, vacation, personal time); length of service awards; comp time; allowances or other notable benefits.
5. Provide analysis a recommendation on “market rate” for each position as it relates to each community. Include written analyses and basis for data that may vary from a majority of the collected information.

Alternative #1: SCOPE OF WORK FOR ADDITIONAL CLASSIFICATION AND PAY PLAN

In addition to the wage survey, the City of Edgerton is interested in receiving a quotation for a full classification analysis of all full and regular part-time positions, including creation of a pay plan incorporating all of these positions with accompanying salary ranges.

The City is interested in having a credible classification and compensation plan that:

1. Establishes equitable internal relationships among positions based on accurate documentation of job duties and factors such as complexity, responsibility, and required knowledge, skills and abilities.
2. Provides wages and benefit practices that are competitive with those of comparable organizations employing staff in similar capacities.
3. Complies with all applicable laws and governmental regulations, is easy to administer and maintain, and can be understood and accepted by employees, managers, elected officials and taxpayers.
4. Creates a fiscally prudent plan that can be implemented at a reasonable expense to the City.

FINAL PRODUCT

If the City opts for the additional services quoted, the consultant will develop a classification plan which will include performance of the following tasks:

1. Orient employees and elected officials on the project scope, goals, and methodology.
2. Review, discuss, and solicit input from management team on organizational values, concerns and needs. Review with managers and solicit input on Position Description Questionnaire.
3. Employees to complete Position Description Questionnaire.
4. Recommend an appropriate salary range for each existing or proposed position in the classification plan based on the compensation survey results, internal relationships and equity.
5. Draft new position descriptions per agreed upon format to uniformly reflect distinguishing characteristics, essential job functions, minimum qualifications, education requirements, working conditions, license requirements, regulatory requirements, standby/call-out responsibilities, etc., for all existing and proposed classifications. Distinctions between jobs should be readily understood, while providing broad based, generic classifications, where appropriate. Core training components to advance to the next position should be included as appropriate. In addition, the position descriptions should include any other standard language recommended to be in compliance with labor laws.
6. Present drafted policies and/or administrative guidelines to the Personnel Committee for recommendation to the City Council for adoption and implementation of the new system.

PRE-PROPOSAL ASSISTANCE

General questions regarding development of a proposal should be directed to Ramona Flanigan, City Administrator, City of Edgerton 608-884-3341 or via email at rflanigan@cityofedgerton.com.

PROPOSAL REQUIREMENTS TO INCLUDE

1. Consultant's Qualifications:

Provide a list of the principal(s) who will perform the work, along with a detailed resume of qualifications and recent similar experience. The proposal shall identify the Project Manager. Each resume shall be in sufficient detail to analyze the proposed individual's qualifications and must, at a minimum, include number of years with the firm, education, major projects worked on or completed within the past five years, and related experience. In addition, describe the qualifications and history of the firm.

2. Consultant's References:

Experience with public sector agencies is necessary. Provide the names of the last five (5) clients for whom the firm has provided similar services. Include the name of the client's company/agency, the name of a contact person, and their phone number and email address. Include a specific description of the project undertaken by the firm for the respective community.

3. Proposed Project Plan:

Provide a detailed description of how the firm will complete all components of this assignment. Fully outline the firm's job analysis and compensation methodology including study objective, end products, processes, number of meetings, and procedures.

Provide a detailed time schedule identifying expected starting and completion dates of each phase of the work plan.

4. Statement of Methods and Procedures

Provide a statement describing the Scope of Work as you understand it, and describe the approach, means, methods and procedures to be employed to gather the wage data, analyze findings and develop recommendations as requested. Provide samples of job analysis tool(s) that you propose to use in conjunction with the classification plan work. Please provide a sample excerpt of the end product.

5. Project Cost:

Submit a detailed and separate cost analysis for services described in this RFP and a breakdown of the hours of effort for each employee working on the project. The cost analysis should include a total not-to-exceed cost for the compensation survey and a separate cost for a classification plan.

PROPOSAL FORMAT

The consultant shall email one electronic copy of the proposal to jsalvo@cityofedgerton.com or mail one paper copy to the City of Edgerton, 12 Albion Street, Edgerton WI 53534 by **3:00 p.m., Wednesday, November 25, 2020**. The respondent must ensure that the proposal is actually delivered by the deadline. Late proposals will not be considered.

The submission of a response shall constitute an acknowledgement upon which the City may rely that the Consultant thoroughly examined and is familiar with the requirements and contract documents, and reviewed and inspected all applicable statutes, regulations, ordinances, and resolutions dealing with or related to the work and services to be provided.

The City reserves the right to select any number of proposals for consideration, and may conduct additional meetings, or may otherwise engage consultants for additional information or negotiations as it deems necessary. There will be no disclosure of contents to competing firms, and all proposals will be kept confidential during the negotiation process. Except for trade secrets and confidential information, which the respondent identifies as proprietary, all proposals will be open for public inspection after the contract is awarded.

Respondents may withdraw their proposal at any time prior to the closing time for acceptance of proposals. However, no respondent shall withdraw or cancel his or her proposal for a period of 90 days after closing date for acceptance of proposals.

All cost directly or indirectly related to preparation of the response to the RFP or any oral presentation required to supplement and/or clarify a proposal which may be required by the communities shall be the sole responsibility of and shall be borne by the respondent.

EVALUATION OF PROPOSALS

The City reserve the right to accept or reject any or all proposals, to waive any and all informalities and technicalities, and to accept the offer considered to be in the best interest of the communities.

The City shall consider only responsible Consultants/Firms. Responsible Consultants/Firms are those that have, in the sole judgment of the City, the financial ability, experience, resources, skills, capability, reliability and integrity necessary to perform the requirements of the contract.

The Cities seek competitively priced billing services; however, cost may not be the primary factor in the final selection of a service provider.

Industry experience and evidence of proven performance will be an important factor in the selection. The communities may also consider references, financial stability, and any other information available. The past performance of the respondent, as verified by references, will be of important consideration.

Proposals will be evaluated using the following criteria and point system.

<u>CRITERIA</u>	<u>POINT VALUE</u>
Level of Service: Comparison of proposal to stated goals and scope of work	15
Consultant's qualifications: Experience and performance record	25
Ability to perform the work within the stated timeframes	10
Cost	<u>50</u>
TOTAL	100

CONTRACT AWARD

The contract(s) will be awarded to the respondent who submits a proposal that, in the judgment of the City, is best able to produce a quality product for the best price. The final selection of the consultant by December 7, 2020 is anticipated with the expectation that the salary survey portion of the project will be completed by **January 28, 2021**. Proposals must include information regarding whether they can meet the January 28th deadline or whether an alternative date is requested.

The approved contract(s) will include provisions dealing with the following matters and other relevant issues:

- Contractor (successful firm) will be an independent contractor.
- All work products such as reports, recommendations, or other documents shall be the property of the City upon payment for services resulting in the work product.
- Contractor will have no right to render services beyond those expressly described in the scope of work.
- A timeline for performance objectives.
- Provisions for termination in the event of non-performance.
- The City is an equal opportunity employer and any mandated Federal and State laws and requirements shall be followed.

APPENDIX 1 – List of Benchmark positions and job summaries

City Administrator / Finance Director

Administration: Chief Administrative Officer for the organization responsible for overseeing the administration and management of municipal operations. Carries out the directives of the governing body. Responsible for supervising and evaluating department managers. Represents the municipality in interactions with other governmental agencies, businesses, developers, citizens and the press. Assists the governing body in establishing and implementing goals and objectives. Prepares and presents budgetary and policy recommendations to the governing body.

Finance: This position is responsible for directing, coordinating and administering the financial management functions for the municipality. Areas of responsibility include: short and long-term financial planning and coordinating the development and administration of municipal budgets for operating funds, capital projects, debt-service, and enterprise funds.

Human Resources: This position is responsible for recruitment and selection, labor relations, classification and compensation, performance evaluations and equal employment opportunity.

Planning/ Economic Development: Responsible for coordinating and administering the City's growth management, development, redevelopment and grant programs; ensures that the City's residential, commercial and industrial development proceeds within the guidelines established in the City's Comprehensive Plan; and coordinates, supervises, and participates in the City's zoning and land use review process.

City Clerk / Treasurer

Clerk: Appointed position responsible for managing the City Clerk functions as prescribed by statute and local ordinance. Includes administering elections; issuing licenses and permits; attending City Council and Board of Review meetings; prepares/distributes meeting agendas and minutes; maintains official City records and provides information to the public.

Treasurer: Appointed position responsible for managing the City Treasurer functions as prescribed by statute and local ordinance. Includes overseeing financial processing, accounting and financial reporting, cash management and investing.

Human Resources: Responsible for carrying out a variety of personnel functions including payroll maintenance and benefits administration. Acts as a resource person, providing information regarding the City's payroll and benefits.

Accounting: This position maintains the accounting records and involves oversight of A/P, A/R, payroll processing, journal entries, bank reconciliation, annual audit, federal and state reports, cash management, and investments. Maintains and processes financial records such as fixed assets, special assessments and charges related to development agreements. Analyzes cash positions and develops investment strategy consistent to maximize interest earnings consistent with investment policy and financial analysis for investments and budgeting.

Administrative Assistant/Accounting/Billing Clerk

Administrative: This is a position that is responsible for providing with prompt and accurate clerical services. Duties include receiving, compiling, processing, and filing information; providing information on policies, procedures, and services; maintaining records and files; customer service; answering and directing phone calls; performing various secretarial, clerical, and typing duties. This position is primarily responsible for social media operations and website maintenance.

Accounting: This position is responsible for the application of bookkeeping skills to the verifying and posting of accounts payable and receivable, payroll data, special assessment accounting, and other bookkeeping or recording tasks of comparable difficulty. Employee enters hours on a biweekly payroll for all employees creates vouchers payable list. Employees follow standard procedures but must exercise judgment in analyzing transactions, determining entries and status of billings.

Billing: Performs clerical work including the compiling, recording and filing of daily information, thereby, enabling quick access for billing purposes. Receipts and posts payment, reconciles daily cash drawer, and handles account inquiries. Responsible for utility billing.

Clerk: Assists with registering voters and administering elections; issuing licenses and permits; prepares/distributes meeting agendas and minutes; assists with the maintenance of official City records and provides information to the public.

Municipal Services Director

Responsible for planning, organizing, coordinating, and directing the operations and activities of any of the following activities (Wastewater utility, Water utility, Parks, Forestry, Streets, Cemetery, and Stormwater utility). Ensures that all property, vehicles, structures, and capital improvements owned by the city are properly maintained and serviced. Formulates short- and long-range plans; develops and oversees service contracts; develops and manages operating and capital budgets; maintains municipal services within regulatory compliance and complete required reports to outside agencies; supervises the lead operators.

Public Works Working Foreman

Under the direction of the Municipal Services Director, the position provides general supervision of the public works street operations crew and will coordinate all tasks involving installation, maintenance, repair, and operation of City facilities, parks, and equipment. The working foreman performs supervisory and administrative functions requiring the use of judgment in the planning and carrying out of work activities. The working foreman is responsible for assigning the daily tasks of the street operations crew, and will perform all duties of the Public Works Operator. The working foreman recommends discipline to the Municipal Services Director.

Public Works Operator

This position ensures that property and equipment are properly maintained in a prompt, effective manner; performs buildings and grounds maintenance including parks, cemetery, sidewalk, curb and gutter, manhole casting, and storm pipe and inlet repairs; operates heavy equipment and dump trucks; responds to emergencies including breakdowns, building repairs, storm damage, and snow removal; and makes mechanical repairs.

Wastewater Lead Operator

Wastewater plant: Under the supervision of the Municipal Services Director, serves as Operator in charge and is responsible for the day-to-day operation of the wastewater utility. Performs maintenance on plant and lift station pumps and associated equipment. Performs plant sampling and laboratory analysis using delicate instruments and performs statistical analysis of data. Provides technical advice and assistance on the operation and processes of the plant and is capable of performing investigative laboratory or field work. Is responsible for the maintenance, calibration and troubleshooting of plant monitoring equipment. Maintains wastewater treatment operations within regulatory compliance and completes required reports to outside agencies. Maintains WDNR certifications required for operators. Responds in the event of an emergency.

Collection system: performs all collection system and lift station operations and maintenance. Performs jetting and responds to backups. Responds in the event of an emergency. Maintains WDNR certifications required for operators.

Wastewater Operator

Wastewater plant: Performs daily plant sampling and laboratory analysis using delicate instruments and performs statistical analysis of data. Assist in giving technical advice and assistance on the operation and processes of the plant and is capable of performing investigative laboratory or field work as opposed to routine laboratory analysis. Maintains, calibrates and troubleshoots plant monitoring equipment. Assists with the City's discharge monitoring program and administers sampling program. Responds in the event of an emergency. Maintains WDNR certifications required for operators.

Collection system: performs all collection system and lift station operations and maintenance. Performs jetting and responds to backups. Responds in the event of an emergency. Maintains WDNR certifications required for operators.

Water Lead Operator

Under the supervision of the Municipal Services Director, serves as Operator in charge and is responsible for the day-to-day operation of the water utility. Plans, coordinates and provides labor for construction and maintenance of all public water facilities. Plans and implements customer meters, cross connection, valve, and hydrant maintenance programs. Inspects, troubleshoots and provides maintenance of wells, pump houses and towers. Operates and provide maintenance of equipment including heavy equipment. Maintains water operations within regulatory compliance and completes tests and required reports to outside agencies. Responds in the event of an emergency. Maintains WDNR certifications required for operators.

Water Operator

Provides labor for construction and maintenance of all public water facilities. Implements customer meters, cross connection, valve, and hydrant maintenance programs. Inspects, troubleshoots and provides maintenance of wells, pump houses and towers. Operates and provide maintenance of equipment including heavy equipment. Maintains water operations within regulatory compliance and completes tests and required reports to outside agencies. Responds in the event of an emergency. Maintains WDNR certifications required for operators.

Police Chief

Responsible for emergency and non-emergency police services. Develops long-term objectives and policies/procedures; supervises and evaluates department employees; maintains department discipline; responds to community inquiries and grievances; and prepares and administers the department budget. Responsible for developing and maintaining relationships with outside agencies, recruitment, community outreach, and policy revision. Responds in case of an emergency and may serve as backup patrol.

Police Lieutenant

Reports to the Chief of Police as a first line supervisor. Assist the Chief in planning, organization and directing major program activities within the department. Performs or assist with the following activities: Patrol, Recruitment, FTO program, community outreach, crime prevention, special events, citizen's academy, process review, policy revision, scheduling, ordinance review, release of records, internal investigations, training, etc.

Police Administrative Assistant

Under the supervision of the Police Chief, this is a position is responsible for providing prompt and accurate clerical services. Duties include receiving, compiling, processing, and filing information; preparing and maintaining records and files; answering and directing phone calls; performing customer service at service counter; handle and account for cash payments; balance payroll; preparing reports.

Library Director

Responsible for planning, organizing, coordinating, and directing the operations and activities of the Public Library. The incumbent must possess a Wisconsin Grade I Librarian Certification. Formulates short- and long-range plans; develops and oversees service contracts; and administering the budget.

Responsible for providing a comprehensive program of library services for children, youths, and adults. Develops and maintains a collection of materials; plans and implements reading related activities; provides reference information and referral services to library patrons; prepares publicity to inform the public about library programs and services; and provides outreach to students in district schools and day cares by promoting library use. Performs duties of library assistants.

Library Assistant

Performs circulation desk procedures, such as checking in and checking out materials, registering patrons and collecting fines; catalogs holdings in a computer database; processes and withdraws library materials; sorts and routes mail, books, periodicals and other library materials; assists with, library programs, and displays; advises patrons about library materials; assists patrons with the operation of library equipment; plans and assists with library programming; and provides technical support for library patrons.

APPENDIX 2 –PROPOSER GUARANTEES AND WARRANTIES

- I. The proposer certifies it can and will provide and make available, at a minimum, all services set forth in description of the Scope of Work.
- II. Proposer warrants that it will not delegate or subcontract its responsibilities under an agreement without the prior written permission of the City.
- III. Proposer warrants that all information provided by it in connection with this proposal is true and accurate.
- IV. Proposer must identify below any specific area(s) where they **cannot** meet the requirements set forth in this RFP.

Signature of Official: _____

Name (Print): _____

Title: _____

Firm: _____

Telephone: _____

Address: _____

Date: _____

Email: _____

APPENDIX 3 –COST ANALYSIS

Total not to exceed cost for the compensation study \$ _____

Total not-to-exceed cost for a classification plan \$ _____

Number of meetings with decision making bodies included in the proposal _____

Cost per meeting for extra meetings with decision making body \$ _____

(Please attach a breakdown of the hours of effort for each employee working on the project.)

Signature of Official: _____

Name (Print): _____

Title: _____

Firm: _____