

**RESOLUTION NO. 23-106**

**A RESOLUTION OF THE CITY OF PANAMA CITY BEACH, FLORIDA, APPROVING AN AGREEMENT WITH EVERGREEN SOLUTIONS, LLC, FOR PERFORMANCE OF AN EMPLOYEE CLASSIFICATION AND COMPENSATION STUDY IN THE AMOUNT OF \$33,500; AND AUTHORIZING A BUDGET AMENDMENT TO APPROPRIATE FUNDS FOR THIS PURPOSE.**

**BE IT RESOLVED that:**

1. The appropriate officers of the City are authorized to accept and deliver on behalf of the City that certain Agreement between the City and Evergreen Solutions, LLC, relating to the performance of an employee classification and compensation study, in the amount of Thirty-Three Thousand, Five Hundred Dollars and No Cents (\$33,500.00), in substantially the form **attached** as Exhibit A and presented to the Council today, with such changes, insertions or omissions as may be approved by the City Manager and whose execution shall be conclusive evidence of such approval.
2. The following budget amendment #16 is adopted for the City of Panama City Beach, Florida, for the fiscal year beginning October 1, 2022 and ending September 30, 2023, as shown in and in accordance with the **attached** and incorporated Exhibit B.

**THIS RESOLUTION** shall be effective immediately upon passage.

**PASSED** in regular session this 9<sup>th</sup> day of February, 2023.

**CITY OF PANAMA CITY BEACH**

By: \_\_\_\_\_

Mark Sheldon, Mayor

**ATTEST:**

Lynne Fasone  
Lynne Fasone, City Clerk

**CITY OF PANAMA CITY BEACH  
BUDGET TRANSFER FORM BF-10**

BA# 16

	LEDGER ACCOUNT	ACCOUNT DESCRIPTION	APPROVED BUDGET	BUDGET ADJUSTMENT	AMENDED BUDGET
TO	001-1300-513.31-60	Professional Other	160,000.00	33,500.00	193,500.00
FROM	001-8100-999.96-00	Reserves Available for Expenditures	18,053,557.00	(33,500.00)	18,020,057.00
		Check Adjustment Totals:	18,213,557.00	0.00	18,213,557.00

**BRIEF JUSTIFICATION FOR BUDGET ADJUSTMENT:**  
 To appropriate \$33,500 from available reserves for a pay plan study with Evergreen Solutions

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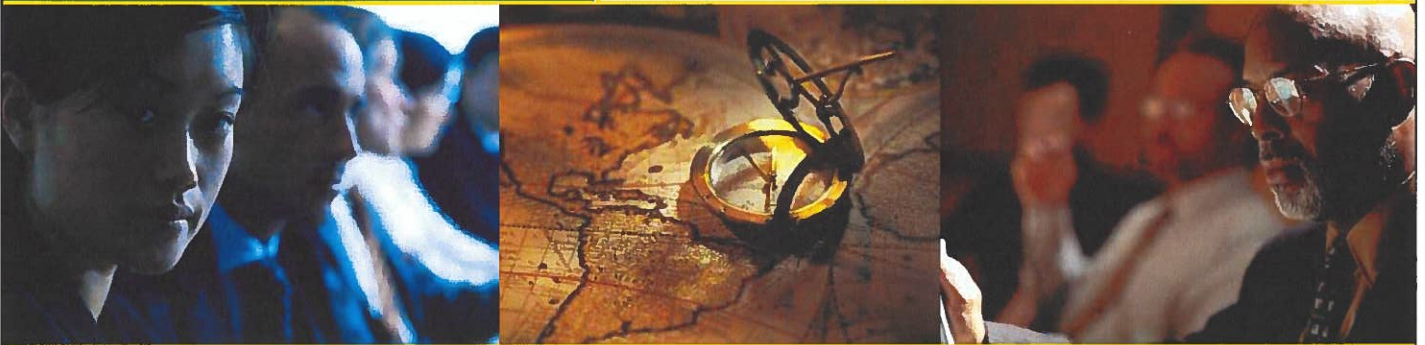


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**FINANCE REVIEW:** \_\_\_\_\_  
**RESOLUTION #:** \_\_\_\_\_  
**DATE:** \_\_\_\_\_

**A Proposal to Conduct a  
Classification and Pay Plan Study  
for the City of Panama City Beach, FL  
RFP #PCB23-22**

**ORIGINAL**



Evergreen Solutions, LLC

January 3, 2022



# Evergreen Solutions, LLC

2878 Remington Green Circle - Tallahassee, Florida 32308  
850.383.0111 - fax 850.383.1511

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December 29, 2022

Ms. Carrie Jagers, Purchasing Manager  
City of Panama City Beach

Dear Ms. Jagers:

Evergreen Solutions, LLC is pleased to submit a proposal to conduct a Classification and Pay Plan Study for the City of Panama City Beach. Our response is based on our review of your Request for Proposals (RFP #PCB23-22), our understanding of the Florida labor market, our experience working with hundreds of local governments and other public sector organizations, and our knowledge of best practices in human resources management. **We believe we are the best suited to provide the services being requested by the City of Panama City Beach as we have conducted more than 1,100 similar studies throughout the country.**

Evergreen was formed in 2004 in Florida to provide an alternative to traditional consulting practices, we provide an innovative and effective option by focusing on clients needing partners and not simply another service provider. As a national firm, Evergreen Solutions continues to grow and our territory now includes clients in 46 states. In the State of Florida, Evergreen has conducted more than 200 classification and/or compensation related studies for local governments and other public sector organizations.

The following is a list of just some of the Florida municipal clients that our consultant team has worked with, or is currently on contract to work with, that involved services similar in scope to the services being requested: City of Panama City; **City of Panama City Beach**; City of Destin; City of Fort Walton Beach; City of Pensacola; City of Alachua; City of Lake City; City of Ocala; City of Gainesville; City of St. Cloud; City of High Springs; City of Bushnell; City of Bunnell; City of Temple Terrace; City of Orlando; City of Winter Park; City of Kissimmee; City of Bartow; City of West Melbourne; City of Melbourne; City of Daytona Beach Shores; City of Holly Hill; City of Maitland; City of St. Petersburg; City of Dunedin; City of Jacksonville Beach; City of Jacksonville; City of Palm Bay; City of Orange City; City of Alachua; City of Deltona; City of Ft. Myers; City of Sebastian; City of North Port; City of Cocoa; City of Holy Hill; City of Punta Gorda; City of Daytona Beach; City of Plantation; City of Palm Beach Gardens; City of Dania Beach; City of Tamarac; City of North Miami Beach; City of Hollywood; City of Sunny Isles Beach; City of Homestead; City of Key West; City of Parkland; City of Sunrise; City of Coral Springs; City of Sarasota; Bay County; Santa Rosa County; Okaloosa County; Walton County; Gadsden County; Gulf County; Leon County; Wakulla County; Franklin County; Charlotte County; DeSoto County; Hardee County; Collier County; Highlands County; Sarasota County; Monroe County; Palm Beach County; Miami-Dade County; Pinellas County; Marion County; Manatee County; Martin County; Seminole County; Sumter County; Orange County; Brevard County; Flagler County; Lake County; Alachua County; Hernando County; Osceola County; Citrus County; Miami Shores Village; Village of North Palm Beach; Village of Pinecrest; Village of Islamorada; Town of Lake Park; Town of Jupiter; Town of Cutler Bay; Town of Davie; Town of Longboat Key; Town of Lady Lake; Town of Orange Park, FL; Town of Palm Beach; and many others.

The Evergreen Team is able to fully comprehend the challenges and goals of the City of Panama City Beach because of our vast understanding of local government human resources, and the fact that we possess the necessary experience and qualifications. Our team has significant expertise in conducting classification and pay plan studies for local governments and other public sector organizations, especially in the State of Florida. Detailed resumes are available upon request.

Some of the human resource services Evergreen Solutions has focused on include: classification and pay plan studies; salary and benefits surveys; performance management studies; recruitment, hiring, and retention studies;

workload analyses; HR department reviews; organizational assessments; strategic and workforce planning; and staffing 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 local government human resources management. As a result, our team understands how critical a classification and compensation system is to the overall operation of a proficient and progressive municipality. We have developed helpful methods and tools that assist clients in implementing and maintaining our study recommendations.

Evergreen's approach to conducting a classification and pay plan study draws not only from extensive human resources work with local government clients, but also from direct feedback of our past clients. In essence, we offer you tools that are innovative as well as those that have been proven to work in real places with real people. Some of the key facets of our approach includes:

- Major emphasis is placed on communication as the key to a successful study as well as its 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, administrators, department directors, and employees need to be involved in each step of the process. Our communication plan is a critical component of any study and to ensure our clients are informed of statuses or potential challenges, we provide continuous communication through the use of regular meetings and written progress reports.
- Our methodology utilizes the latest technology in order to reduce the cost to our client partners and enhance wider participation by offering of our tools in an electronic format. In essence, every step of the process can be completed on the Web. Further, our web-based *JobForce Manager* tool allows our client partners to facilitate implementation and eases the ongoing maintenance of the compensation system.
- We understand that one size does not fit all. Some consultants provide the same overall solution to every client. We take great pride in providing 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. Our office is located at 2878 Remington Green Circle, Tallahassee, FL 32308.

We appreciate this opportunity and commit to you our best effort if selected for this engagement. If you have any questions, please contact me at (850) 383-0111 or via email at [jeff@consultevergreen.com](mailto:jeff@consultevergreen.com).

Sincerely,



Dr. Jeff Ling, President  
Evergreen Solutions, LLC



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# Response to Request for Proposals

Evergreen Solutions is well qualified to conduct a Classification and Pay Plan Study for the City of Panama City Beach due to our experience in conducting more than 1,100 of these studies for local governments across the country, including more than 200 in the State of Florida. As required in the Request for Proposals (RFP), we have limited the following response to no more than 20 pages, excluding the forms which have been uploaded separately.

## 1. Brief Overview

Evergreen Solutions, a Limited Liability Company (partnership), is a national, multidisciplinary, public sector management consulting firm, which specializes in working with public sector organizations, including hundreds of 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 was formed in 2004 to provide a modern, practical alternative to the typical consulting options. The firm is made up of management and human resource 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’s philosophy of service is based on an understanding that there is not a “one size that fits all” solution to compensation management. Our approach is built on working collaboratively with all parties to make sound, implementation-focused recommendations.

Evergreen employs 26 full-time and six part-time professional who provide a variety of human resource consulting services. Evergreen is authorized to transact business in the State of Florida (L04000073478).

Evergreen’s main focus is on people, management, and technology. This focus allows our team to provide a broad variety of services, including: classification and compensation studies; salary and benefits surveys; performance evaluation reviews; workload analyses; staffing studies; organizational reviews; HR department reviews; training assessments; and strategic planning.

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



Clients nationwide have been successfully implementing recommendations from our team of professional consultants for decades. For more than 18 years, Evergreen has contracted with public sector, quasi-governmental, and non-profit organizations in 46 states throughout the country. In fact, Evergreen has conducted more than 1,100 classification and/or compensation studies throughout the country, the majority of which have been located in the State of Florida.

**Exhibit 1** includes a list of some of the public sector clients in the State of Florida that our consultant team has worked with, or is currently in contract to work with, in providing work similar in scope to the services being requested.



### Exhibit 1: Florida Public Sector Clients

City of Alachua	City of St. Cloud	Alachua County Sheriff's Office
City of Apalachicola	City of St. Petersburg	Bay County Sheriff's Office
City of Bartow	City of Sunny Isles Beach	Clay County Sheriff's Office
City of Bunnell	City of Tallahassee	Collier County Sheriff's Office
City of Bushnell	City of Tamarac	Flagler County Sheriff's Office
City of Cape Coral	City of Temple Terrace	Lake County Sheriff's Office
City of Clermont	City of Venice	Leon County Sheriff's Office
City of Cocoa	City of West Melbourne	Manatee County Sheriff's Office
City of Coral Springs	City of Winter Park	Monroe County Sheriff's Office
City of Dania Beach	City of Sunrise	Nassau County Sheriff's Office
City of Daytona Beach	City of Zephyrhills	Okaloosa County Sheriff's Office
City of Daytona Beach Shores	Alachua County	Pasco County Sheriff's Office
City of Delray Beach	Bay County	Volusia County Sheriff's Office
City of Deltona	Brevard County	Walton County Sheriff's Office
City of Destin	Charlotte County	Florida Sheriff's Association
City of Doral	Citrus County	Florida Association of Counties
City of Dunedin	DeSoto County	Florida League of Cities
City of Fort Myers	Escambia County	FL Association of Court Clerks/Comptrollers
City of Fort Walton Beach	Flagler County	FL Public Human Resource Association
City of Green Cove Springs	Gulf County	Board of Bar Examiners
City of Groveland	Hardee County	The Florida Bar
City of High Springs	Hernando County	Hillsborough County Clerk of Court/Comptrollers
City of Holly Hill	Highlands County	Ft. Pierce Utilities Authority
City of Hollywood	Lake County	Keys Energy Services
City of Holmes Beach	Leon County	Kissimmee Utility Authority
City of Homestead	Manatee County	Utilities Commission of New Smyrna Beach
City of Key West	Martin County	Florida Keys Aqueduct Authority
City of Jacksonville	Miami-Dade County	Sarasota Bay Estuary Program
City of Jacksonville Beach	Miami Shores Village	Toho Water Authority
City of Kissimmee	Monroe County	Tampa Bay Water
City of Lake City	Osceola County	Peace River Manasota Reg. Water Supply Auth.
City of Largo	Palm Beach County	St. Johns River Water Management District
City of Maitland	Pinellas County	Southwest Florida Water Management District
City of Marathon	Santa Rosa County	South Florida Water Management District
City of Melbourne	Sarasota County	Loxahatchee River District
City of Miramar	Seminole County	Solid Waste Authority of Palm Beach County
City of New Smyrna Beach	Sumter County	CareerSource Pinellas
City of North Miami Beach	Wakulla County	CareerSource Northeast Florida
City of North Port	Town of Belleair	Worknet Pinellas
City of Ocala	Town of Cutler Bay	Association for Institutional Research
City of Orange City	Town of Davie	Florida Telecommunications Relay, Inc.
City of Orlando	Town of Juno Beach	Orange County Library System
City of Palm Bay	Town of Jupiter	Pinellas Housing Authority
City of Palm Beach Gardens	Town of Lade Lake	Manatee County Clerk's Office
City of Panama City	Town of Lake Park	Gadsden County Property Appraiser's Office
<b>City of Panama City Beach</b>	Town of Longboat Key	Brevard County Property Appraiser's Office
City of Parkland	Town of Medley	Brevard County Tax Collector
City of Pensacola	Town of Palm Beach	Health Care District of Palm Beach County
City of Plant City	Town of Ponce Inlet	Glades General Hospital
City of Plantation	Town of Orange Park	Hillsborough Area Transit Authority
City of Punta Gorda	Town of Surfside	Orlando-Orange County Expressway Authority
City of Sarasota	Village of Islamorada	Sarasota-Manatee County Airport
City of Sebastian	Village of North Palm Beach	Northwest Florida Beaches International Airport
City of Sebring	Village of Pinecrest	Barefoot Bay Recreation District





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## 2. Executive Summary

In this section we include our approach and methodology for conducting the Classification and Pay Plan Study for the City of Panama City Beach; a detailed work plan—identifying the tasks, activities, and milestones necessary to accomplish the deliverables required in the scope of services of the Request for Proposals; and a proposed timeline.

### 2.1 Approach and Methodology

Evergreen Solutions is uniquely qualified to conduct a Classification and Pay Plan Study for the City of Panama City Beach as our team includes recognized experts in local government human resources management and understands that there is not a “one size that 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 implementation strategy that: focuses on market competitiveness; 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 City’s designated Project Manager, and the Human Resources Department throughout the process to ensure constant communication of issues, concerns, and potential outcomes. In addition, we will 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 your resources.

Compensation management has undergone significant transformation in the private sector and over time public sector organizations have mirrored these changes. While compensation once centered on the separate administration of base pay and core benefits, a shift has occurred that has transformed compensation management. Progressive organizations now recognize that—to effectively recruit, reward, motivate, and retain employees—compensation management requires strategic thinking and planning. Compensation management must support an organization’s overall strategic direction. To accomplish this, effective organizations design a compensation philosophy that details where an organization wants to be in relation to the market in key areas. These key areas include cash compensation, benefits, and work/life balance. Compensation is thus a reflection of the organization’s philosophy.

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

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

**Kick Off Meeting** - Evergreen begins each engagement by meeting with our client’s leadership team. Frequently, this initial meeting will accomplish several goals, including: finalizing the project work plan; identifying milestone and deliverable dates; gaining insight into the management structure and approach; collecting classification and compensation data; identifying additional data needs; and developing preliminary schedules for subsequent tasks.



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

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

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

We have found that employee orientation sessions and focus groups are critical venues for building employee participation and buy-in. Since they take place at the outset of the project, they are a critical introduction to the project and the question-and-answer formats allow employees to become engaged in the process. During these sessions, Evergreen consultants can also help to manage expectations since some employees may have unrealistic expectations based on anecdotal information.

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

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

The JAT contains questions that ask about each of the following areas: scope of duties; complexity of work; supervision received and exercised; physical requirements; financial responsibilities; analytical/mental requirements; knowledge and skills required for the job; and level of responsibility/reporting relationships.

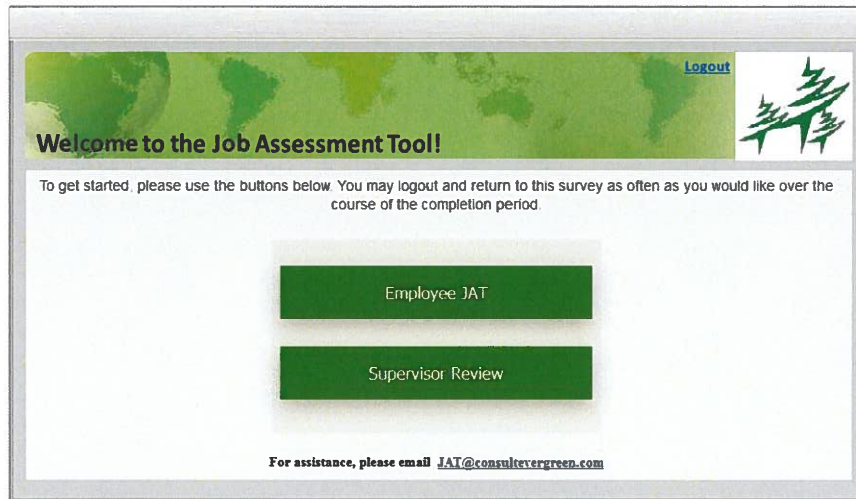
Evergreen will contact the client's Project Manager should there be a need to clarify question responses or issues with information collected from the JAT. Due to budgetary constraints faced by many of our clients, we have designed the JAT as a web-based tool so that data can be collected electronically.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

**Exhibit 2** depicts a screenshot of the JAT home screen showing the levels of access for a Supervisor. Supervisors have access to their own surveys in addition to the ability to review and approve the surveys of their direct reports. The supervisor review process ensures validation of the JAT data collected from employees and prevents comments made by employees from being taken out of context.



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## Exhibit 2 - Supervisor's JAT Home Screen



Source: Evergreen Solutions, 2022

**Exhibit 3** illustrates how Evergreen uses the JAT to collect functional details of employee's jobs. Seeking to understand how employees summarize their responsibilities in their own words allows our analysis to expand beyond what may be conveyed in a traditional job description. An informal survey of municipal employees revealed that 90 percent felt that the job descriptions held on file with their employers were inaccurate or incomplete representations of their duties. Understanding this, Evergreen designed the JAT to fill in those gaps to ensure that the entirety of an employee's job is analyzed within the context of the study.



### Exhibit 3 - Job Description and Responsibilities

The screenshot shows a web form titled "Basic Job-Related Information" with a "Logout" link and a logo in the top right. The form is divided into several sections:

- Job Introduction:** A text box for providing an overview of the job.
- Type of Work:** A radio button selection for job levels: Clerical/Manual, Laborer/Trade-Based Occupations, Technician/Paraprofessional, Administrator, Managerial/Professional, and Executive/Advanced Professional.
- Education and Experience:** Two dropdown menus for selecting education and experience levels.
- Licenses and Certifications:** A text box for listing required licenses or certifications.

A green "Save" button is located at the bottom of the form.

Source: Evergreen Solutions, 2022

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





## Exhibit 4 - Job Functions

[Logout](#)

### Essential Job Functions

On the lines provided, please include all essential job functions you perform. For every function you list, estimate the total percent of your time spent on each function on an annual basis and check off which tasks are a priority. A priority task is one that is core to your position.

Task 1		Percent	<input type="text" value="100"/>	Priority	<input type="checkbox"/>
Task 2		Percent	<input type="text" value="100"/>	Priority	<input type="checkbox"/>
Task 3		Percent	<input type="text" value="100"/>	Priority	<input type="checkbox"/>
Task 4		Percent	<input type="text" value="100"/>	Priority	<input type="checkbox"/>
Task 5		Percent	<input type="text" value="100"/>	Priority	<input type="checkbox"/>
Task 6		Percent	<input type="text" value="100"/>	Priority	<input type="checkbox"/>
Task 7		Priority	<input type="text" value="100"/>	Percent	<input type="checkbox"/>
Task 8		Percent	<input type="text" value="100"/>	Priority	<input type="checkbox"/>
Task 9		Percent	<input type="text" value="100"/>	Priority	<input type="checkbox"/>
Task 10		Percent	<input type="text" value="100"/>	Priority	<input type="checkbox"/>

Source: Evergreen Solutions, 2022

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

**Job Evaluation** - The next step in the process is to review responses to the JATs and identify any possible misclassifications. Once the review of the JATs has been completed, Evergreen’s consultants will evaluate all jobs on each of the compensatory factors, score each position, and determine if there is any need for further investigation of specific positions. If serious discrepancies exist, Evergreen’s consultants will work directly with the Client Project Manager to resolve any issues.

Once work has been properly classified, changes in the current classification system rankings can be recommended. Our goal is to produce a classification system that reflects the internal equity relationships suggested by the JAT scoring conducted earlier.



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**Compensation** - 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.

The most traditional component of a total compensation program is base pay (fixed pay). However, inclusion of benefits in total compensation strategy is not a new concept. Provision of benefits was originally a recruitment tool, though over time the provision of core benefits has become an expectation. Research shows that public sector organizations commonly use superior benefits packages as a way to offset structural disadvantages in base pay. The purpose of the survey is to collect information for comparison to current offerings, and making recommendations for change consistent with the parameters of the organization's compensation philosophy.

**Market Survey** - A key component of assessing compensation is to consider market position, which is sometimes referred to as external equity or competitiveness. Evergreen's consultants wait until well into the classification analysis to design the market survey to ensure that jobs are understood, anomalies in classification characteristics are documented, and sufficient input has been received. The market survey will obtain standard range information related to minimum, midpoint, and maximum salaries. Data collection will focus on the public sector, but will include information from the private sector where applicable. Further, we will look to include any employers to whom the organization has recently lost employees.

**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 suit the client's needs in the labor market survey. Based on our experience, we have found that it is simply not practical to survey all positions within the organization—the resulting surveys become too cumbersome for labor market peers to complete, and the response rate overall 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 client to identify the most appropriate targets to survey. Evergreen selects peer organizations based on the local labor competition, regional markets, and class-specific markets. Peer organizations should be those organizations that compete with the client for labor in at least one job family. An appropriate mix of peers in the public and private sectors will be included in the survey, and if necessary, augmented with published secondary data sources.

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

An important factor of our methodology is that the client has the final approval of all aspects of the study. We will not proceed with the analysis unless the client is completely comfortable with the survey targets chosen. Often, there are different factors impacting an organization, such as proximity to a major metropolitan area, technology corridor, or specific market (i.e., military base), that have a direct effect on its ability to recruit and retain employees in specific positions. These factors must 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.



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

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

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

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

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

Once this review and assessment are complete, revisions to the current practices and/or new guidelines can be recommended, as needed. At a minimum, the recommendations will address areas such as: how employees will move through the pay structure/system as a result of transfers, promotions, or demotions; how to pay employees whose base pay has reached the maximum of their pay range or value of their position; the proper mix of pay; how often to adjust pay scales and survey the market; timing of implementation; and how to keep the system fair and competitive over time.

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

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

**Exhibit 5** displays the interface from **JobForce Manager** for determining position's pay grade; additional features include a job scoring tabulation sheet, market survey results database and summary report, pay plan report, and employee salary calculators for modeling fiscal impacts of compensation changes at the employee level. All data and reports are downloadable and printable, so they can provide to key decision makers.



### Exhibit 5 - JobForce Manager Tool

Pay Plans	Scoring/Slotting	Compensation	Market		
<a href="#">Download Data</a> <a href="#">Grid Edit</a>					
CURRENT TITLE ▲	PAY PLAN	JAT SCORE	REGRESSION MIDPOINT	MARKET MIDPOINT	POSITION MIDPOINT (SELECT)
Accounting Specialist II	ESP	212.5	\$30,100.27	\$31,220.80	\$31,508.69
Accounting Specialist III	ESP	281.3	\$39,058.27	\$34,379.43	\$40,213.96
Accounting Specialist IV	ESP	306.3	\$42,315.73	\$40,166.80	\$44,335.90
Accounting Supervisor	ESP	500.0	\$67,561.02	\$69,350.91	\$68,779.53
Acquisition Specialist	ESP	306.3	\$42,315.73	\$41,595.60	\$44,335.90
Administrative Aide	ESP	312.5	\$43,130.09	\$36,624.74	\$44,335.90
Administrative Recording Secretary	Professional	381.3	\$52,088.10	\$40,994.30	\$58,245.16
Administrative School Secretary I	ESP	206.3	\$29,285.91	\$31,619.17	\$33,084.13
Administrative School Secretary II	ESP	231.3	\$32,543.36	\$35,996.59	\$34,738.33
Administrative School Secretary III	ESP	256.3	\$35,800.82	\$37,701.80	\$38,299.01
Administrative Secretary I	ESP	231.3	\$32,543.36	\$32,190.02	\$33,084.13
Administrative Secretary I	ESP	206.3	\$29,285.91	\$32,190.02	\$33,084.13
Administrative Secretary II	ESP	231.3	\$32,543.36	\$33,919.04	\$34,738.33
Administrative Secretary II	ESP	231.3	\$32,543.36	\$33,919.04	\$34,738.33
Administrative Secretary III	ESP	256.3	\$35,800.82	\$35,971.01	\$38,299.01
Administrative Specialist	Professional	231.3	\$32,543.36	\$43,762.63	\$39,422.62
Administrative Specialist-School Food Services	Professional	275.0	\$38,243.91	\$42,861.08	\$45,636.61

Source: Evergreen Solutions, 2022

## 2.2 Detailed Work Plan

In this section we provide a detailed work plan for how we would accomplish all the work being requested by the City of Panama City Beach. Evergreen understands the City has approximately 375 employees who will be included in the study.

### Task 1.0 - Project Initiation

**TASK GOALS:** Finalize the project plan with the City of Panama City (City); gather all pertinent data; finalize any remaining contractual negotiations; and establish an agreeable final timeline for all project milestones and deliverables.

#### TASK ACTIVITIES

- 1.1 Discuss with the City’s Project Manager (CPM) the following objectives: understand the mission of the City; 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.





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- 1.2 Identify potential challenges and opportunities for the study. Discuss the strategic direction of the City and some of the short- and long-term priorities. This activity serves as the basis for assessing where the City is going and what type of pay plan will reinforce current and future goals.
  - 1.3 Obtain relevant materials from the City, including: any previous projects, research, evaluations, or other studies that may be relevant to this project; organizational charts for the departments and divisions, along with related responsibility descriptions; current position and classification descriptions, salary schedule(s), and classification system; strategic business plans and budgets; and personnel policies and procedures, and the step placement policies.
  - 1.4 Review and edit the project work plan and submit a schedule for the completion of each project task.
  - 1.5 Provide progress reports to the CPM throughout the course of the study.

**KEY PROJECT MILESTONES:** Comprehensive project management plan and database of City employees

### **Task 2.0 – Evaluate the Current System**

**TASK GOALS:** Conduct a comprehensive preliminary evaluation of the City’s compensation plan.

#### **TASK ACTIVITIES**

- 2.1 Obtain and review the existing pay philosophy and structure and look for potential problems and issues to be resolved.
- 2.2 Determine the strengths and weaknesses of the current pay plan(s). Discuss any pay compression issues that may exist and discuss possible solutions.
- 2.3 Complete an assessment of current conditions that details the pros and cons of the current system as well as highlights areas for potential improvement in the final adopted solution.

**KEY PROJECT MILESTONES:** Review of existing compensation plan(s) and assessment of current conditions

### **Task 3.0 - Collect and Review Current Environmental Data**

**TASK GOALS:** Conduct statistical and anecdotal research into the current environment within the City and guide subsequent analytical tasks.

#### **TASK ACTIVITIES**

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



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**KEY PROJECT MILESTONES:** JAT and MIT distribution; department director interviews; and employee focus groups and orientation sessions

**Task 4.0 – Evaluate and Build Projected Classification Plan**

**TASK GOALS:** Identify the classification of existing positions utilizing Evergreen’s job evaluation system; review JAT responses; and characterize internal equity relationships within the City.

**TASK ACTIVITIES**

- 4.1 Ensure that all class specifications that are included in the study are provided by the CPM.
- 4.2 Review the work performed by each classification and score. Include an evaluation of supervisory comments.
- 4.3 Review JAT scores and identify the classification of positions.
- 4.4 Schedule and conduct additional follow up with employees for jobs where uncertainty exists over data obtained from the JATs.
- 4.5 Develop preliminary recommendations for the classification structure. The classification system designed at this point would be based solely on internal equity relationships and would be guided by the JAT scores for each classification. Essentially, a structure of classifications would be established, and classifications with similar scoring would be grouped and spacing between jobs would be determined.
- 4.6 Review recommendations with the CPM.

**KEY PROJECT MILESTONES:** JAT scores by class; recommended classification changes; and preliminary job structure based on internal equity

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

**TASK GOALS:** Reach an appropriate number and identify the proper benchmark positions for the external labor market salary assessment and identify and develop a comprehensive list of targets for conducting a successful external labor market salary assessment.

**TASK ACTIVITIES**

- 5.1 Identify a list of classifications (benchmarks) to include in the labor market salary survey. **Note:** Evergreen will work with the CPM to select up to 80 classifications to use as benchmarks for the market salary survey.
- 5.2 Finalize the list of classifications to use as benchmarks for the market salary survey.
- 5.3 Evergreen will work with the CPM to select up to 20 targets (i.e., peer organizations) for the market salary survey.
- 5.4 Finalize a list of survey targets for the external labor market survey, placing a comparative emphasis on characteristics such as: size of the organization; geographic proximity to the Panama City Beach area; economic and budget characteristics; and other demographic data.
- 5.5 Review survey methodology with the CPM and refine survey methodology prior to distribution of surveys.
- 5.6 After approval of survey methodology, develop contact list of peer organizations and notify peers of impending surveys.



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**KEY PROJECT MILESTONES:** Preliminary list of benchmark positions for the external labor market assessment; final list of benchmark positions for the external labor market assessment; initial list of survey peers; final list of survey peers and contacts; and survey methodology

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

**TASK GOALS:** Conduct the external labor market salary survey; and provide a summary of the salary survey results to the CPM for review.

**TASK ACTIVITIES**

- 6.1 Prepare customized external labor market salary survey for the CPM’s approval. Discuss questions and categories to include in the market survey with the CPM.
- 6.2 Contact the targets for electronic completion of the surveys. Provide paper copies by fax, if requested.
- 6.3 Conduct necessary follow-up through e-mails, faxes, and phone calls.
- 6.4 Collect and enter results of surveys into Evergreen’s electronic data analysis tools.
- 6.5 Validate all data submitted and develop and submit summary report of external labor market salary assessment results to the CPM.

**KEY PROJECT MILESTONES:** Market salary survey instrument and summary report of external labor market salary assessment results

**Task 7.0 – Develop Strategic Positioning Recommendations**

**TASK GOALS:** Assess the appropriateness of the City’s current compensation policy and develop a plan for all employees, providing issue areas and preliminary recommendations for strategic improvement.

**TASK ACTIVITIES**

- 7.1 Identify the compensation policy and accompanying thresholds.
- 7.2 Using the market salary data collected in **Task 6.0** and the classification data reviewed in **Task 4.0**, determine the proper pay plan including number of grades, steps, and ranges.
- 7.3 Produce a pay plan(s) that best meets the needs of the City from an internal equity and external equity standpoint.

**KEY PROJECT MILESTONES:** Proposed compensation strategic direction, taking into account internal and external equity and plan for addressing unique, highly competitive positions

**Task 8.0 – Conduct Solution Analysis**

**TASK GOALS:** Conduct analysis comparing JAT values; survey results for the benchmark positions; and produce several possible solutions for implementation.

**TASK ACTIVITIES**

- 8.1 Conduct regression analysis or other appropriate techniques to properly slot each classification into the proposed pay plan for the City.



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- 8.2 Place all classifications into pay grades based on **Task Activity 8.1**. Sort alphabetically by job class title, in descending order by range, and by old class title and new class specifications.
  - 8.3 Create implementation solutions for consideration that take into account the current position of the City as well as the findings from the classification and compensation analysis. Identify and prepare a range of compensation policy alternatives.
  - 8.4 Discuss with the CPM potential solutions.
  - 8.5 Determine the best solution to meet the needs of the City in the short-term and long-term and document the accepted solution.

**KEY PROJECT MILESTONES:** Initial regression analysis; potential solutions; and documented final solution

#### **Task 9.0 – Develop and Submit Draft and Final Reports**

**TASK GOALS:** Develop and submit a draft and final report of the Classification and Pay Plan Study to the City of Panama City Beach and present the final report.

#### **TASK ACTIVITIES**

- 9.1 Produce a preliminary draft report that captures the results of each previous step. The report will include a description of the recommended classification and pay plan and will include a one-, two-, and three-year implementation plan and the costs associated with implementing all recommendations.
- 9.2 Submit the draft report to the CPM for review and approval.
- 9.3 Make edits and submit necessary copies of the final report to the CPM.
- 9.4 Present the final report, if requested.
- 9.5 Develop implementation database to communicate the process and progress of this project to the CPM.

**KEY PROJECT MILESTONES:** Draft and final reports; final presentation; communication plan; and implementation and maintenance database

#### **Task 10.0 – Develop Recommendations for Compensation Administration**

**TASK GOALS:** Develop recommendations for the continued administration by City staff to sustain the recommended classification and compensation structure and provide training.

#### **TASK ACTIVITIES**

- 10.1 Develop recommendations and guidelines for the continued administration and maintenance of the classification and compensation structure, 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.
- 10.2 Recommend recruitment/retention strategies, where appropriate.





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

**KEY PROJECT MILESTONES:** Recommendations for compensation administration; recommendations for recruitment/retention policies; and training

### **Task 11.0 – Provide Revised Class Descriptions and FLSA Determinations**

**TASK GOALS:** Update existing class descriptions; create new class descriptions as needed, ensuring EEO/ADA requirement satisfaction; identify FLSA and DOL compliance issues; provide final version of all class descriptions/specifications in electronic format (i.e., MS Word) after approval by the CPM.

#### **TASK ACTIVITIES**

- 11.1 Assess current class descriptions for form, content, validity, and ADA compliance.
- 11.2 Discuss any necessary changes to the class description format with the CPM and revise classification descriptions based on data gathered from the JAT process.
- 11.3 Create new class descriptions based on the proposed classification structure by leveraging data from the job evaluation process, as needed. Provide complete listing of the allocation of job classes to salary range assignments.
- 11.4 Make FLSA determinations based on work performed and federal requirements.
- 11.5 Recommend a systematic, regular process for reviewing job descriptions.

**KEY PROJECT MILESTONES:** Updated class descriptions; new class descriptions as needed; and FLSA determinations

## **2.3 Proposed Timeline**

Evergreen possesses the ability, staff, skills, and tools to conduct the Classification and Pay Plan Study for the City of Panama City Beach in four months of the project start date and following the signing of the contract. This is based on a tentative start date of February 1, 2023, as stated in the RFP, and a completion date of May 31, 2023. This proposed timeline can be modified in any way to best meet the needs of the City.

## **3. Proposed Project Team**

The following paragraphs provide **summary resumes** of each team member's qualifications and experience related to his/her role in this engagement.



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**Dr. Jeff Ling, CCP – Project Principal.** Dr. Ling is the President of Evergreen Solutions who has been with the firm since its inception in 2004. He is a Certified Compensation Professional (CCP) who has more than 25 years 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 includes:

- **Compensation/Classification**– He developed the methodology and techniques for organizations to employ for successful data collection and implementation based on internal and external equity needs. He has been the Project Principal for numerous projects related to classification and/or compensation. **Note: He has served as the Project Principal for more than 1,100 public sector projects related to Classification and/or Compensation.**
- **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.
- **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.

**Mr. Rob Williamson – Project Director.** Mr. Rob Williamson is a Project Manager with Evergreen. He brings more than 20 years of proven leadership experience serving both private and public sector clients. His diverse leadership includes time as a business owner, County Commissioner, CEO of a mid-sized water and wastewater treatment utility, Executive Director of a three-member regional water utility provider, and most recently, Manager of the Florida Association of Counties’ 23-county insurance trust.



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During his career, Mr. Williamson has served on boards of directors for more than two dozen public, private, civic and charitable organizations. This includes time as Chairman of the Santa Rosa County Board of County Commissioners, RESTORE Council, Tourist Development Council, Florida/Alabama Transportation Planning Organization and as a member of the Florida Gulf Consortium, Florida Association of Counties Executive Board, Leadership Santa Rosa, and the Institute for County Government to name a few. He is also a member of the Florida Rural Water Association.

Mr. Williamson helps organizations create new strategic pathways to solve complex problems. His areas of focus include policy development, strategic planning, change management, government services, transportation planning, master planning, tourism, RESTORE Act implementation and leadership development.

Some of the recent projects that Mr. Williamson has directed or been involved with include: ; a Classification and Compensation Study for DeSoto County, FL; a Compensation Study for the Lake Apopka Natural Gas District, FL; a Comprehensive Classification and Compensation Study for Citrus County, FL; a Classification and Compensation Study for the City of Apalachicola, FL; a Compensation Study for the City of New Port Richey, FL; a Classification and Compensation Study for the City of Oldsmar, FL; a Compensation Study for the City of Bradenton, FL; a Classification and Compensation Study for the City of Cooper City, FL; a Classification and Compensation Study for the City of Kissimmee, FL; a Classification and Compensation Study for the Manatee County Sheriff's Office, FL; a Compensation Study for the Marion County Property Appraiser, FL; a Classification and Compensation Study for Barrow County, GA; a Classification and Compensation Study and Analysis for Columbus Consolidated Government, GA; a Classification and Compensation Study for the City of Jackson, GA; a Compensation Study for Cherokee County, GA; a Classification and Compensation Study for the City of Johns Creek, GA; a Classification and Compensation Study for the City of Jackson, GA; a Classification and Compensation Study for the City of Calhoun, GA; a Classification and Compensation Study for the City of Hampton, GA; a Classification and Compensation Study for the City of Sylvester, GA; a Compensation Study for Cobb County-Marietta Water Authority, GA; a Classification and Compensation Study and Analysis for Clayton County Water Authority, GA; a Compensation Study for Douglasville-Douglas County Water and Sewer Authority, GA; a Classification and Compensation Study for the City of Vienna, GA; a Compensation Study for the City of Duluth, GA a Job Market Survey for New Braunfels Utilities, TX; a Compensation Study for the City of Aransas Pass, TX; a Classification and Compensation Study for Blanco County, TX; a Compensation Study for the Metropolitan St. Louis Water District, MO; a Compensation Study and Analysis for McLean County, IL; a Classification and Compensation Study for the City of Moline, IL; a Comprehensive Total Compensation Study for Cumberland County, PA;; a Classification and Compensation Study for the City of Auburn, AL; a Compensation and Benefits Study for the City of Mobile, AL; a Classification and Compensation Study for Riviera Utilities, AL; a Classification and Compensation Study for Culpeper County, VA; and HR Market Study for Botetourt County, VA; a Classification and Compensation Study for Dare County, NC; a Compensation Study for North Charleston Sewer District, SC; a Compensation Study for the Town of Central, SC; a Classification and Compensation Study and Analysis for Darlington County, SC; an Employee Compensation and Classification Study for the City of Greenwood, SC; and a Compensation Study for the City of Orangeburg, Department of Public Utilities, SC.

Mr. Williamson has certifications from the Cambridge Leadership Institute and the Kenan-Flagler Business School Leadership Institute and possesses a Bachelor of Science Degree in Sociology from Florida State University.

**Ms. Nancy Berkley – Project Consultant.** Ms. Berkley is the Vice-President of Evergreen Solutions who has been with the firm more than nine years. She 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



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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. **Note: She has directed more than 250 HR projects since joining Evergreen, including many in the State of Florida.**

Ms. Berkley possesses expertise in the following HR areas:

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; and 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.

Ms. Berkley has a Bachelor’s Degree in Psychology from Florida State University.

**Ms. Brenda Whurr – Project Consultant.** Ms. Brenda Whurr, PHR, SHRM-CP, is a Consultant with Evergreen who has more than 15 years of human resource management experience. As a former HR Director in both Florida and North Carolina, she led an HR team with onboarding, payroll processing and day-to-day employee issues; administered leave and workers’ compensation; worked with leadership on recruiting strategies and employee relations issues; coordinated open enrollment and other benefits programs; implemented policies and procedures to assist in the transformation of a small company approach to a larger, multi-location company; transitioned the HR Department into a paperless document storage system; developed and implemented a recruiting program; and led initiatives for a Wellness Program and Family Fun Day to increase employee engagement.

Some of the recent projects she has been involved with include; a Classification and Compensation Study for DeSoto County, FL; a Comprehensive Classification and Compensation Study for Citrus County, FL; a Compensation Study for the City of New Port Richey, FL; a Classification and Compensation Study for the City of Oldsmar, FL; a Classification and Compensation Study for the City of Cooper City, FL; a Classification and Compensation Study for the City of Kissimmee, FL ; a Classification and Compensation Study for the City of Jackson, GA; a Compensation Study for the City of Duluth, GA; a Compensation Study for Cherokee County, GA; a Classification and Compensation Study for the City of Johns Creek, GA; a Classification and Compensation Study for the City of Jackson, GA; a Classification and Compensation Study for the City of Hampton, GA; a Compensation Study for Cobb County-Marietta Water Authority, GA; a Classification and Compensation Study and Analysis for Clayton County Water Authority, GA; a Compensation Study for Douglasville-Douglas County Water and Sewer Authority, GA; a Classification and Compensation Study for the City of Vienna, GA; a Compensation Study for the City of Aransas Pass, TX; a Classification and Compensation Study for Blanco County, TX; a Classification and Compensation Study for the City of Moline, IL; a Compensation and Benefits Study for the City of Mobile, AL; a Classification and Compensation Study for Riviera Utilities, AL; a Classification and Compensation Study for Culpeper County, VA; a Compensation Study for the North Charleston Sewer District, SC; a Classification and Compensation Study and Analysis for Darlington County, SC; and a Compensation Study for the City of Orangeburg, Department of Public Utilities, SC.





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Ms. Whurr has a Bachelor's of Science in Management Information Systems and possesses a Professional Human Resources certification (PHR) as well as a certification as a professional with SHRM.

**Mr. Peter Backhaus – Project Consultant.** Mr. Backhaus is a Consultant with Evergreen Solutions. He is able to apply his knowledge and skills as a Senior Analyst for Evergreen, through various functions including: conducting market research and collecting compensation data, running regression analyses, and recommending appropriate pay grades.

Mr. Backhaus began his career working in sales through various markets. He quickly transitioned into a role with Verizon's most prominent partner as an account manager, focusing on business relationships and growth in the Tallahassee area. Most prominently in his sales path, he joined a startup in Tallahassee as the sales manager to lead a team through client growth and retention, while also developing outbound strategy for adopting new verticals for the company. With the startup, projected targets were exceeded, and several notable clients were guided to successful business paths. He strongly values the relationships developed with his clients and communication through all modes of life.

Mr. Backhaus has a Bachelor's of Science in Economics with Minors in Sociology and Communication.



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

#### **4. Select Relevant Experience**

Because Evergreen has conducted more than 1,100 classification and/or compensation related studies throughout the country, we include in this section only a sample of five local government projects in the State of Florida near Panama City Beach. **Note: Evergreen has also conducted two similar studies for the City of Panama City Beach.**

**City of Panama City – Comprehensive Classification and Compensation Study (included performance evaluation):** 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.

**City of Fort Walton Beach – Compensation Study:** Evergreen Solutions was engaged with the City of Fort Walton Beach to conduct a Compensation Study. Evergreen's consultants conducted a salary survey for the purpose of ensuring that the City's pay plan is competitive in the market for retaining and recruiting talented employees. Note: Evergreen has conducted multiple studies for the City of Fort Walton in the past.

**City of Destin – Classification and Compensation Study:** Evergreen Solutions was again engaged with the City of Destin to conduct a Classification and Compensation Study. Evergreen's consultants conducted a job analysis to determine relative worth of positions within the City and conducted a market salary survey of peers and used the results to revise the City's compensation plan for all employees to ensure that the City stayed externally competitive in the market



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**Walton County – Classification and Compensation Study:** Evergreen Solutions is retained by Walton County to conduct a Classification and Compensation Study. Evergreen’s consultant will conduct a job analysis to determine the proper hierarchy of jobs within the County; conduct a salary survey and analysis to determine competitive market rates; update job descriptions; and prepare a final report with cost analysis for implementation of all recommendations. **Note:** Evergreen has also worked with the Walton County Sheriff’s Office.

**Bay County – Pay and Classification Study:** 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 **Note:** Evergreen has also worked with the Bay County Sheriff’s Office.

## **5. Pending Lawsuits/Past Litigation**

Evergreen Solutions has never had any litigation filed against the company within the last five 5 years.

## **6. References**

We have provided you with the following three references that we feel demonstrate the breadth and quality of the work our team has performed as it relates to the services being requested. We invite you to contact our client references as to the quality and timeliness of our consulting projects. Additional references are available upon request.

### **Pay and Classification Study - City of Destin, Florida**

**Contact Information:** Nichole DeVito, MRHM/PHR, Human Resources Manager/Risk Manager, (850) 460-8546, [ndevito@cityofdestin.com](mailto:ndevito@cityofdestin.com)

**Project Start and End Date:** 10/15/2021 to 2/15/2022

### **Classification and Compensation Study - Franklin County, Florida**

**Contact Information:** Erin Griffith, Fiscal Manager / Grants Coordinator (850) 653-9783 Ext. 158  
[erin@franklincountyflorida.com](mailto:erin@franklincountyflorida.com)

**Project Start and End Date:** 3/1/2021 to 1/21/2022

### **Compensation Study - Leon County, Florida**

**Contact Information:** Alan Rosenzweig, County Administrator, (850) 606-5318,  
[RosenzweigA@leoncountyfl.gov](mailto:RosenzweigA@leoncountyfl.gov)

**Project Start and End Date:** 2/4/2021 to 8/31/2021

## **7. Proposed Compensation**

Evergreen Solutions, LLC is pleased to present our proposed cost to conduct a Classification and Pay Plan Study for the City of Panama City Beach. We are committed to providing the highest quality consulting services to our client partners for a reasonable price. Our firm is fortunate that our overhead is minimal and our expenses are reasonable so we can pass that cost savings on to our clients.

Our total, not-to-exceed, fixed cost to complete all tasks identified in our detailed work plan in **Section 2.2** is **\$33,500**. Our cost is all inclusive, and includes travel costs (meals and lodging), transportation, fringe benefits, indirect costs (overhead), clerical support, and all other out-of-pocket expenses. Our preferred payment schedule is as follows: 25% - upon completion of Tasks 1 – 2; 25% upon completion of Tasks 3 – 4; 25% - upon completion of Tasks 5 – 6; and 25% - upon completion of Tasks 7 – 11.

**Evergreen is willing to negotiate the time, scope, and cost of the basic tasks, or any other options that the City of Panama City Beach wishes to identify.**





# Consulting Services Agreement

By and Between

City of Panama City Beach, Florida

and

Evergreen Solutions, LLC

This Agreement (the "Agreement"), dated as of February 9, 2023, is made by and between Evergreen Solutions, LLC, a Florida corporation ("Evergreen"), and City of Panama City Beach (the "Client").

WHEREAS, Evergreen Solutions and the Client desire to enter into an agreement whereby Evergreen will provide certain management consulting services for the Client on the terms and conditions hereinafter set forth; and

WHEREAS, Evergreen Solutions is willing to provide such management consulting services for the Client.

NOW, THEREFORE, the parties hereto agree as follows:

**1. Engagement.** Evergreen Solutions hereby agrees to provide such management consulting services for the Client as may be reasonably requested by the Client in connection with the Request for Proposals (RFP #PCB23-22) and Proposal submitted by Evergreen Solutions on January 3, 2023.

**2. Extent of Services.** Evergreen Solutions agrees to perform such services to the best of its ability and in a diligent and conscientious manner and to devote appropriate time, energies and skill to those duties called for hereunder during the term of this Agreement and in connection with the performance of such duties to act in a manner consistent with the primary objective of completing the engagement.

Evergreen Solutions agrees to devote such time as is reasonably required to fulfill its duties hereunder. Throughout the duration of this agreement, Evergreen Solutions will serve as an independent contractor of the Client, as such; Evergreen Solutions will obey all laws relating to federal and state income taxes,



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associated payroll and business taxes, licenses and fees, workers compensation insurance, and all other applicable state and federal laws and regulations.

In the successful completion of this engagement, Evergreen Solutions may utilize subcontractors, but Evergreen Solutions shall remain completely responsible to the Client for performance under this Agreement.

**3. Term.** The engagement of the Consultant hereunder by Client shall commence as of the date hereof and shall continue through June 30, 2023, unless earlier terminated, pursuant to Section 5 hereof.

**4. Compensation.**

(a) As compensation for the services contemplated herein and for performance rendered by Evergreen Solutions of its duties and obligations hereunder, the Client shall pay to Evergreen Solutions an aggregate fee equal to \$33,500 (the "Consulting Fee"), earned and payable according to the following invoice/payment schedule:

- 25% - upon completion of Tasks 1 – 2
- 25% - upon completion of Tasks 3 – 4
- 25% - upon completion of Tasks 5 – 6
- 15% - upon completion of Tasks 7 – 10
- 10% - upon completion of Task 11

(b) The Client's sole obligation shall be to pay Evergreen Solutions the amounts described in Section 4(a) of this Agreement, and the Consultant is not and shall not be deemed an employee of the Client for any purpose.

**5. Termination.** This Agreement shall be terminated as follows:

(a) 30 days after written notice of termination is given by either party at any time after **Date of Contract**, provided however, that if the Client shall terminate this Agreement pursuant to this Section 5(a) for any reason other than Consultant's material breach of this Agreement (having given prior notice of, and reasonable opportunity for Consultant to cure, any such breach), Client shall pay to consultant in one lump sum an amount equal to that portion of the aggregate Consulting Fee which has not been paid to Consultant as of the effective date of such termination.

(b) On such date as is mutually agreed by the parties in writing.

(c) Upon expiration of the Term as set forth in Section 3.

If Client elects to terminate for material breach then Client shall pay to consultant in one lump sum an amount equal only to that for which services have been rendered.

Upon termination of this Agreement pursuant to this Section 5, except as contemplated by Section 5(a) in the event Client terminates this Agreement in the absence of continuing material breach hereof by Consultant, Consultant shall be entitled to payment of only that portion of the Consulting Fee earned through the effective date of such termination and any portion of the Lump Sum Payment which has not been paid to Consultant as of the effective date of such termination.

**6. Confidential Information.** Evergreen Solutions shall not, at any time during or following expiration or termination of its engagement hereunder (regardless of the manner, reason, time or cause thereof) directly





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or indirectly disclose or furnish to any person not entitled to receive the same for the immediate benefit of the Client any trade secrets or confidential information as determined by the Client in writing.

**7. Covenants.** Evergreen Solutions agrees to (a) faithfully and diligently do and perform the acts and duties required in connection with its engagement hereunder, and (b) not engage in any activity which is or likely is contrary to the welfare, interest or benefit of the business now or hereafter conducted by the Client.

**8. Binding Effect.** This Agreement will inure to the benefit of and shall be binding upon the parties hereto and their respective successors or assigns (whether resulting from any re organization, consolidation or merger of either of the parties or any assignment to a business to which all or substantially all of the assets of either party are sold).

**9. Entire Agreement.** This Agreement, including the aforementioned RFP and proposal, contains the entire agreement and understanding of the parties with respect to the subject matter hereof, supersedes all prior agreements and understandings with respect thereto and cannot be modified, amended, waived or terminated, in whole or in part, except in writing signed by the party to be charged.

**10. Notices.** All notices required to be given under the terms of this Agreement or which any of the parties desires to give hereunder shall be in writing and personally delivered or sent by registered or certified mail, return receipt requested, or sent by facsimile transmission, addressed as follows:

(a.) If to Evergreen Solutions addressed to:

Evergreen Solutions, LLC  
Attention: Dr. Jeff Ling, President  
2878 Remington Green Circle  
Tallahassee, Florida 32308

(b.) If to the Client addressed to:

City of Panama City Beach  
Attention: Carrie Jagers, FPC, Purchasing Manager  
17007 Panama City Beach Parkway  
Panama City Beach, Florida 32413

Any party may designate a change of address at any time by giving written notice thereof to the other parties.

**11. Miscellaneous.** This Agreement:

(a) shall be binding upon and inure to the benefit of the parties hereto and their respective successors and permitted assigns;

(b) may not (except as provided in Section 9 hereof) be assigned by either party hereto without the prior written consent of the other party (any purported assignment hereof in violation of this provision being null and void);

(c) may be executed in any number of counterparts, and by any party on separate counterparts, each of which as so executed and delivered shall be deemed an original but all of which together shall constitute



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one and the same instrument, and it shall not be necessary in making proof of this Agreement as to any party hereto to produce or account for more than one such counterpart executed and delivered by such party;

(d) may be amended, modified or supplemented only by a written instrument executed by all of the parties hereto; and

(e) embodies the entire agreement and understanding of the parties hereto in respect of the transactions contemplated hereby and supersedes all prior agreements and understandings among the parties with respect thereto.

IN WITNESS WHEREOF, the parties hereto have executed this Agreement as of the date first above written.

Evergreen Solutions, LLC

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Jeff Ling, President

City of Panama City Beach

  
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Drew Whitman, City Manager

ATTEST:

  
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Lynne Fasone, City Clerk

