

**SUMTER COUNTY BOARD OF COMMISSIONERS
EXECUTIVE SUMMARY**

SUBJECT: Award and enter into contract with Evergreen Solutions, LLC for RFP 153-0-2010/AT Sumter County Comprehensive Compensation Study (Staff recommends approval).

REQUESTED ACTION: Award and enter into contract with Evergreen Solutions, LLC

Work Session (Report Only) **DATE OF MEETING:** 5/11/2010
 Regular Meeting Special Meeting

CONTRACT: N/A Vendor/Entity: Evergreen Solutions, LLC
Effective Date: 5/11/2010 Termination Date: 5/11/2013
Managing Division / Dept: Human Resources

BUDGET IMPACT: \$14,000.00
 Annual **FUNDING SOURCE:** General Fund
 Capital **EXPENDITURE ACCOUNT:** Human Resources, Professional Services
 N/A

HISTORY/FACTS/ISSUES:

RFP 153-0-2010/AT Sumter County Comprehensive Compensation Study was broadcast on 3-23-2010. Proposals were due on 4-26-2010 at 10:00 am and were opened at 10:05 am in Room 142 at the Government Offices, 910 North Main Street, Bushnell, FL 33513.

A total of nine proposals were received on time and one proposal from PRM Consulting was not on time and was rejected.

The proposals received are listed in order from lowest to highest price as follows: Evergreen Solutions, LLC, \$14,000.00; Cody & Associates, Inc. \$16,500.00; Fox, Lawson & Associates, \$33,000.00; Springstead \$37,500.00; The Waters Consulting Group \$49,000.00; The Segal Company \$50,000.00; CPS Human Resources, Inc. \$50,220.00; Crowe Horwath \$71,750.00; Milliman \$102,800.00.

The Selection Review Committee met on 4-28-2010 at 10:00 am in Room 142 to discuss, review, and score the submitted proposals. After review the Committee agreed to interview Evergreen Solutions, LLC and Springstead.

The interviews were held on 4-29-2010 starting at 10:00 am in Room 142. Springstead presented first and Evergreen Solutions, LLC presented second. After interviews and discussion from the Committee, their recommendation is to award and enter into contract with Evergreen Solutions, LLC.

Attached are the following items: legal ad information, minutes, score sheets, Evergreen Solutions, LLC proposal, and the contract.

REQUEST FOR PROPOSALS

Notice is hereby given that the County Commissioners of Sumter County, Florida, will be receiving bids for the following:

“SUMTER COUNTY COMPREHENSIVE COMPENSATION STUDY”

Bid information is available upon request by calling (352) 569-6067, by coming to the Budget & Purchasing Department, Room 220, Sumter County Government Offices, 910 North Main Street, Bushnell, Florida, or by contacting Demand Star at 1-800-711-1712 or www.DemandStar.com.

All inquiries and questions regarding this bid must be made only to the contact identified below and shall be made in writing by fax, e-mail, or mail:

Amanda Taylor, Budget & Purchasing
Mailing Address: 910 N. Florida Street
Bushnell, FL 33513
E-mail: Amanda.taylor@sumtercountyfl.gov
Fax: (352) 793-0207

The deadline for submission of questions relating to the RFP shall be, April 6, 2010 by 5:00pm. A copy of the bid must be obtained in order to view the items being bid by Sumter County.

All bids are due by 10:00 a.m. on, April 26, 2010. Late submittals will be rejected and returned unopened to the Proposer. Bids must be firmly sealed in packaging that is clearly marked on the outside: “RFP 153-0-2010/AT Request for Proposals for Sumter County Comprehensive Compensation Study”. Sealed Bids must be mailed or delivered to Mrs. Amanda Taylor, at the above address.

Upon submission, all Bids become the property of the County, who has the right to use any or all ideas presented in any Bid submitted in response to this Bid, whether or not the Bid is accepted. Bids will be opened at 10:05am on April 26, 2010 in Room 142.

BOARD OF SUMTER COUNTY COMMISSIONERS
SUMTER COUNTY, FLORIDA

PUBLISH 3/23/2010

RFP 153-0-2010/AT Comprehensive Compensation Study Bid Opening Meeting held on 4-26-2010 at 10:05am in Room 142 at the Government Offices located at 910 North Main Street, Bushnell, FL 33513.

Amanda Taylor and Kitty Fields were present to represent county staff.

Amanda stated following the bid opening meeting the Selection Committee would meet on 4-28-2010 at 10:00am in Room 142 to review, discuss, and short list the proposals. The vendor presentations would be held on 4-29-2010 starting at 10:00am in Room 142. The recommendation of the Selection Committee would be sent to the Sumter County Board of County Commissioners on 5-11-2010.

Amanda stated there were no addenda to acknowledge. There is to be one original packet, three copies, and one electronic version of the proposal submitted.

Two proposals were received late, Milliman and PRM Consulting.

There were a total of eight bids received on time and were opened as follows in no particular order:

1. Springstead, Inc. \$37,500.00 for the professional fee and \$3,650.00 for out-of-pocket expenses, also listed were miscellaneous hourly rates if additional work was needed outside of the scope of services.
2. Crowe Horwath listed a fee of \$71,750.00 for all professional services.
3. Cody & Associates, Inc. listed a fee of \$16,500.00 for all professional services.
4. CPS Human Resources Services listed a fee of \$50,220.00 for professional services, \$2,300.00 for expenses, and miscellaneous hourly rates if additional work was needed outside of the scope of services.
5. The Segal Company listed a fee of \$50,000.00 for all professional services and miscellaneous hourly rates if additional work was needed outside of the scope of services.
6. Fox Lawson & Associates listed a fee of \$33,000.00 for all professional services.
7. Evergreen listed a fee of \$14,000.00 for all professional services.
8. Waters Consulting Group listed a fee of \$49,000.00 for all professional services.

The meeting adjourned at 10:25am.

RFP 153-0-2010/AT Comprehensive Compensation Study for Sumter County Selection Review Committee meeting held on 4-28-2010 at 10:00am in Room 142 located at the Government Offices, 910 North Main Street, Bushnell, FL 33513.

Karen Parker, Kitty Fields, Sandee Howell, and Bradley Arnold were present to represent county staff.

Karen stated vendor presentations would be held on 4-29-2010 starting at 10:00am in Room 142. The Selection Committee's recommendation would be taken to the Sumter County Board of County Commissioners on 5-11-2010.

The Committee discussed Milliman's proposal and the time discrepancy regarding receipt of their proposal. The Committee agreed to accept the proposal and score it utilizing the same scoring guidelines as the other proposals submitted.

The Committee discussed the nine proposals. Sandee stated her top three choices were Evergreen, Springstead, and The Water Consulting Group. Brad stated his top two choices were Evergreen and Springstead. Kitty stated her top three choices were Evergreen, Springstead, and Fox, Lawson & Associates.

Brad stated he was not clear on Waters Consulting Group's detail from the private sector, but the rest of the proposal was well written. The Committee felt Waters Group had a good understanding of the uniqueness of the organization.

Sandee and Brad both stated they did not care for Fox, Lawson & Associates proposal being handwritten, contained several grammar errors, had a lot of typos, and did not seem professionally compiled. Kitty stated she agreed.

The Committee agreed to interview Evergreen and Springstead. A total of 45 minutes would be given to each vendor, 25 minutes for the presentation, and 20 minutes for questions and answers. Brad stated with Evergreen's data already collected it would be easy to utilize. Brad also stated their milestone and deliverable were well demonstrated within their proposal. Sandee stated they had the lowest price. Kitty stated she has spoken to Kelly with the City of Bushnell, who used Evergreen for their compensation study, and were very pleased with their service and process. Kitty also stated that Evergreen had an extensive client list with several companies and county government agencies within Florida.

The Committee turned in their scoring sheets.

The meeting adjourned at 10:15 am.

RFP 153-0-2010/AT Sumter County Comprehensive Compensation Study Vendor Presentation and Selection Committee meeting held on 4-29-2010 at 10:00am in Room 142 located at the Government Offices, 910 North Main Street, Bushnell, FL 33513.

Amanda Taylor, Kitty Fields, Sandra Howell, and Bradley Arnold were present to represent county staff.

Amanda stated two companies would be presenting: Springstead and Evergreen. Each company would be allowed 25 minutes for their presentation and 20 minutes for questions and answers.

Springstead was the first company to present.

John Anzivino and Douglas Walker were present to provide the presentation. A power point presentation packet was handed out to county staff. John and Doug highlighted the following items in their presentation: the team working for Sumter County had 25+ years of local county government experience, the company was based out of Richmond, VA but would be here to facilitate this job face-to-face, a questionnaire would be given to the employees, a complete PAQ (Position Analysis Questionnaire) study would be conducted, the project would be able to be completed within 60 days, the SAFE Analysis would be used (Systematic Analysis and Factor Evaluation).

The Committee asked questions relating to the 16 set skill levels, concerns with constitutional officers employees, how certain situations were handled, their success rate from private and public sectors, and how many visits were included in their pricing. John and Doug responded. Their presentation time concluded at 11:16am.

Evergreen was the second company to present.

Jeff Ling was present to provide the presentation. A power point presentation packet was handed out to county staff. Jeff highlighted the following items in their presentation: Evergreen has done extensive work in FL, some data that they would use for our study has already been collected, the Task Base Approach System would be used for the study, a survey to employees would be given as well as a follow-up meeting with the employees to go over the results of the survey, Brian Wolfe would also be assisting with the study but he was not able to attend today's presentation, staff would be able to go to Share Point Access for up-to-date tracking on the study 24/7.

The Committee asked questions relating to their success rate from private and public sectors, concerns with constitutional officers employees, how certain situations were handled, and how many visits were included. Jeff responded to their questions. Their presentation time concluded at 12:10pm.

The Committee convened at 12:14pm to discuss the presentations. Everyone agreed both presentations were good and both companies offered different areas of expertise.

Kitty stated she liked that Springstead had a lot of knowledge on local government agencies and the SAFE software. Sandee stated she liked that Springstead had knowledge on local government agencies. Brad stated he liked that Springstead provided more examples, and that they brought the team that would be conducting the study.

Kitty stated she liked that Evergreen had a lot of knowledge in FL and in government, and that continued support was provided without an extra fee even after the contract was expired. Sandee stated she liked that Evergreen has relationships in FL already established and a lot of the data already formed. She also likes the fact that they come back and do a close out meeting with the employees. Brad stated he liked Evergreen but was disappointed Brian did not come to make sure all personalities were compatible.

The Committee agreed to recommend Evergreen pending speaking with Brian and making sure there was a comfort level at which all parties would be able to communicate effectively during the study. Kitty stated she would contact Jeff and Brian and report if it did not seem like the relationship with all parties would work.

The meeting adjourned at 12:24pm.

Evergreen
Kelly J. Fields

**PART 2
 EVALUATION AND AWARD**

PROPOSAL EVALUATION

This Request for Proposal includes following all the procedures in this document and sending the sealed proposal information to the Sumter County BOCC by the due date and time. Once proposals are received, the Selection Committee members will independently review each submittal and score each proposal based on the evaluation criteria. All proposals received in accordance with this Request for Proposals will be evaluated using the following criteria.

	Score	X	Weight	=	Rating
1. Proposer's / Team Members Experience in Creation of Compensation Studies	<u>5</u>		<u>.20</u>		<u>1</u>
2. Completeness of Proposals	<u>5</u>		<u>.10</u>		<u>.5</u>
3. Proposer's / Team Members Ability, Capacity and Skill of Proposer and Staff to Perform the Required Services	<u>4</u>		<u>.40</u>		<u>1.6</u>
4. Cost	<u>5</u>		<u>.30</u>		<u>1.5</u>

SCORE:

- 0 = Non-Responsive
- 1 = Poor
- 2 = Fair
- 3 = Average (Included only minimum of what was asked for on subject criteria)
- 4 = Good
- 5 = Excellent

4.6

Do not attempt to contact any Selection Committee Member, staff member or person other than Mrs. Amanda Taylor for questions relating to this project. Anyone attempting to lobby Sumter County BOCC representatives may be disqualified. The Selection Committee Members shall be: Bradley Arnold, County Administrator, Sandra Howell, Assistant County Administrator, and Kitty Fields, Human Resources Manager.

Recommendation of award will be sent to all submitting vendors. The award will be based on the proposal that is most advantageous to Sumter County. All Selection Committee recommendations are subject to Board approval.

The Selection Committee will meet to evaluate proposals in the Room 142 located at 910 North Main Street, Bushnell, FL 33513 at 10:00am on April 28, 2010.

PROPOSAL AWARD

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*Spring, etid
Kitty Fields*

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	Score	X	Weight	=	Rating
1. Proposer's / Team Members Experience in Creation of Compensation Studies	<u>4</u>		<u>.20</u>		<u>.80</u>
2. Completeness of Proposals	<u>4</u>		<u>.10</u>		<u>.40</u>
3. Proposer's / Team Members Ability, Capacity and Skill of Proposer and Staff to Perform the Required Services	<u>3</u>		<u>.40</u>		<u>1.20</u>
4. Cost	<u>4</u>		<u>.30</u>		<u>1.20</u>

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Fox Lawson & Assoc.
Kitty Fields

PART 2 EVALUATION AND AWARD

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	Score	X Weight	= Rating
1. Proposer's / Team Members Experience in Creation of Compensation Studies	<u>2</u>	<u>.20</u>	<u>.40</u>
2. Completeness of Proposals	<u>3</u>	<u>.10</u>	<u>.30</u>
3. Proposer's / Team Members Ability, Capacity and Skill of Proposer and Staff to Perform the Required Services	<u>3</u>	<u>.40</u>	<u>1.20</u>
4. Cost	<u>2</u>	<u>.30</u>	<u>.60</u>

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1 = Poor

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2.5

Do not attempt to contact any Selection Committee Member, staff member or person other than Mrs. Amanda Taylor for questions relating to this project. Anyone attempting to lobby Sumter County BOCC representatives may be disqualified. The Selection Committee Members shall be: Bradley Arnold, County Administrator, Sandra Howell, Assistant County Administrator, and Kitty Fields, Human Resources Manager.

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	Score	X	Weight	=	Rating
1. Proposer's / Team Members Experience in Creation of Compensation Studies	<u>2</u>		<u>.20</u>		<u>.40</u>
2. Completeness of Proposals	<u>3</u>		<u>.10</u>		<u>.30</u>
3. Proposer's / Team Members Ability, Capacity and Skill of Proposer and Staff to Perform the Required Services	<u>3</u>		<u>.40</u>		<u>1.20</u>
4. Cost	<u>1</u>		<u>.30</u>		<u>.30</u>

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2.2

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Segal
Kitty Fields

**PART 2
EVALUATION AND AWARD**

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1. Proposer's / Team Members Experience in Creation of Compensation Studies	<u>1</u>		<u>.20</u>		<u>.20</u>
2. Completeness of Proposals	<u>3</u>		<u>.10</u>		<u>.30</u>
3. Proposer's / Team Members Ability, Capacity and Skill of Proposer and Staff to Perform the Required Services	<u>3</u>		<u>.40</u>		<u>1.20</u>
4. Cost	<u>1</u>		<u>.30</u>		<u>.30</u>

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Kitty J. Fields

Sumter County Comprehensive Compensation Study RFP 153-0-2010/AT

PART 2 EVALUATION AND AWARD

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2. Completeness of Proposals	<u>3</u>		<u>.10</u>		<u>.30</u>
3. Proposer's / Team Members Ability, Capacity and Skill of Proposer and Staff to Perform the Required Services	<u>3</u>		<u>.40</u>		<u>1.20</u>
4. Cost	<u>1</u>		<u>.30</u>		<u>.3</u>

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Claire Norwith
Kitty Fields

PART 2 EVALUATION AND AWARD

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3. Proposer's / Team Members Ability, Capacity and Skill of Proposer and Staff to Perform the Required Services	<u>3</u>	<u>.40</u>	<u>1.20</u>
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Millerman
Kitty Fields

PART 2 EVALUATION AND AWARD

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2. Completeness of Proposals	<u>3</u>		<u>.10</u>		<u>.30</u>
3. Proposer's / Team Members Ability, Capacity and Skill of Proposer and Staff to Perform the Required Services	<u>3</u>		<u>.40</u>		<u>1.20</u>
4. Cost	<u>1</u>		<u>.30</u>		<u>.30</u>

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Cody
Kitty J Fields

**PART 2
EVALUATION AND AWARD**

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2. Completeness of Proposals	<u>4</u>		<u>.10</u>		<u>.4</u>
3. Proposer's / Team Members Ability, Capacity and Skill of Proposer and Staff to Perform the Required Services	<u>1</u>		<u>.40</u>		<u>.4</u>
4. Cost	<u>2</u>		<u>.30</u>		<u>.6</u>

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Sumter County Comprehensive Compensation Study RFP 153-0-2010/AT

EVANGELION SOLUTIONS, LLC
PART 2
EVALUATION AND AWARD

TAL. FL

PROPOSAL EVALUATION

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	Score	X Weight	= Rating
1. Proposer's / Team Members Experience in Creation of Compensation Studies	<u>5</u>	<u>.20</u>	<u>1.0</u>
2. Completeness of Proposals	<u>4</u> 5	<u>.10</u>	<u>.40</u>
3. Proposer's / Team Members Ability, Capacity and Skill of Proposer and Staff to Perform the Required Services	<u>5</u>	<u>.40</u>	<u>2.0</u>
4. Cost 14,000	<u>5</u>	<u>.30</u>	<u>1.5</u>

*MARY FL
- AGAINST;
COUNTIES
/ SEMINOL
DIXIE CITIES #?
AND BUSHNELL*

FUTURE?

\Rightarrow 4.9

SCORE:

- 0 = Non-Responsive
- 1 = Poor
- 2 = Fair
- 3 = Average (Included only minimum of what was asked for on subject criteria)
- 4 = Good
- 5 = Excellent

Do not attempt to contact any Selection Committee Member, staff member or person other than Mrs. Amanda Taylor for questions relating to this project. Anyone attempting to lobby Sumter County BOCC representatives may be disqualified. The Selection Committee Members shall be: Bradley Arnold, County Administrator, Sandra Howell, Assistant County Administrator, and Kitty Fields, Human Resources Manager.

Recommendation of award will be sent to all submitting vendors. The award will be based on the proposal that is most advantageous to Sumter County. All Selection Committee recommendations are subject to Board approval.

The Selection Committee will meet to evaluate proposals in the Room 142 located at 910 North Main Street, Bushnell, FL 33513 at 10:00am on April 28, 2010.

PROPOSAL AWARD

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B. ARNOLD

~~S PRENUSTUD~~
PART 2
EVALUATION AND AWARD

RECOMMEND
JA

PROPOSAL EVALUATION

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	Score	X Weight	= Rating
1. Proposer's / Team Members Experience in Creation of Compensation Studies	<u>5</u>	<u>.20</u>	<u>1.0</u>
2. Completeness of Proposals	<u>5</u>	<u>.10</u>	<u>.50</u>
3. Proposer's / Team Members Ability, Capacity and Skill of Proposer and Staff to Perform the Required Services	<u>4</u>	<u>.40</u>	<u>1.6</u>
4. Cost <u>{37,500 + 3,650}</u> CNS 6 COSTS → 300/POSITION	<u>2</u>	<u>.30</u>	<u>1.2</u>

⇒ 4.3

PREVIOUS SCORE OF SURVEY?

60 DAYS BUT TARGET ~ 7/14/10

SCORE:

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- 1 = Poor
- 2 = Fair
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- 4 = Good
- 5 = Excellent

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The Watkins Consulting Group Inc.

**PART 2
EVALUATION AND AWARD**

DALLAS TX

PROPOSAL EVALUATION

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	Score	X Weight	= Rating
1. Proposer's / Team Members Experience in Creation of Compensation Studies	<u>4</u>	<u>.20</u>	<u>0.80</u>
2. Completeness of Proposals	<u>5</u>	<u>.10</u>	<u>0.50</u>
3. Proposer's / Team Members Ability, Capacity and Skill of Proposer and Staff to Perform the Required Services	<u>4</u>	<u>.40</u>	<u>1.6</u>
4. Cost	<u>3</u>	<u>.30</u>	<u>0.90</u>

How to get private sector?

9 weeks

49,000

SCORE:

- 0 = Non-Responsive
- 1 = Poor
- 2 = Fair
- 3 = Average (Included only minimum of what was asked for on subject criteria)
- 4 = Good
- 5 = Excellent

*7,000 - 142 FULL SUPPORT (NOT 3)
20% = 242,000
400 / POSITION*

5.8

GOOD WRITING

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B. ARNOLD

Sumter County Comprehensive Compensation Study RFP 153-0-2010/AT

COOY & ASSOCIATES INC.

PART 2
EVALUATION AND AWARD COC SA BLACK FL

PROPOSAL EVALUATION

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BIDDING
APPLY
↓
MOST
TIME

	Score	X Weight	= Rating
1. Proposer's / Team Members Experience in Creation of Compensation Studies	5	.20	1.0
2. Completeness of Proposals	5	.10	0.5
3. Proposer's / Team Members Ability, Capacity and Skill of Proposer and Staff to Perform the Required Services	3	.40	1.2
4. Cost	5	.30	1.5

MANY
FL COURSES
INCLUDING
- SUPERVISOR
CONST. ALS

PREQUALIFY INFO?

16,500

FUTURE INCLUDES

⇒ 4.2

SCORE:

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- 1 = Poor
- 2 = Fair
- 3 = Average (Included only minimum of what was asked for on subject criteria)
- 4 = Good
- 5 = Excellent

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Sumter County Comprehensive Compensation Study RFP 153-0-2010/AT

FOX LAWSON & ASSOCIATES

**PART 2
EVALUATION AND AWARD**

PROPOSAL EVALUATION

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	Score	X Weight	= Rating
1. Proposer's / Team Members Experience in Creation of Compensation Studies	5	.20	1.0
2. Completeness of Proposals	4	.10	.40
3. Proposer's / Team Members Ability, Capacity and Skill of Proposer and Staff to Perform the Required Services	4	.40	1.6
4. Cost	4	.30	1.2

4.2
- HANDWRITING
- SLAPP

PLEASE REVIEW

11 WEEKS
ALTHOUGH
2 MONTH

33,000
NO APPEALS

250/APPEAL
ONGOING SUE CASES

SCORE:

- 0 = Non-Responsive
- 1 = Poor
- 2 = Fair
- 3 = Average (Included only minimum of what was asked for on subject criteria)
- 4 = Good
- 5 = Excellent

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THE SEGAL COMPANY
PART 2
EVALUATION AND AWARD

WASHINGTON
DC

PROPOSAL EVALUATION

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	Score	X	Weight	=	Rating
1. Proposer's / Team Members Experience in Creation of Compensation Studies	5		.20		1.0
2. Completeness of Proposals	3		.10		0.30
3. Proposer's / Team Members Ability, Capacity and Skill of Proposer and Staff to Perform the Required Services	4		.40		1.6
4. Cost	3		.30		.9

Handwritten initials/signature in a box.

OF POS 3

CONTRACT 600 DAYS
TEAMS LEADS =
9 WEEKS

50,000

42,500

SCORE: 30 HOURS FOR FUTURE INCLUDED IN PRICE... 30 X 250 = 7,500

- 0 = Non-Responsive
- 1 = Poor
- 2 = Fair
- 3 = Average (Included only minimum of what was asked for on subject criteria)
- 4 = Good
- 5 = Excellent

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B. ARNOLD

CPS HUMAN RESOURCES
PART 2
EVALUATION AND AWARD

SACRAMENTO CA

MARY ANN WHITE
WASH DC POC

PROPOSAL EVALUATION

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	Score	X Weight	= Rating
1. Proposer's / Team Members Experience in Creation of Compensation Studies	4	.20	.8
2. Completeness of Proposals	3	.10	.3
3. Proposer's / Team Members Ability, Capacity and Skill of Proposer and Staff to Perform the Required Services	3	.40	1.2
4. Cost <u>50,220 + 2,300</u>	3	.30	.9

ASSUMES 160 CLASSIFICATIONS

ASSUMPTIONS

CAN'T MEET 60 DAYS PROPOSAL 98

- SCORE:
 0 = Non-Responsive
 1 = Poor
 2 = Fair
 3 = Average (Included only minimum of what was asked for on subject criteria)
 4 = Good
 5 = Excellent

120
105
60

3.2

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MILLERMAN ETC
PART 2
EVALUATION AND AWARD

PROPOSAL EVALUATION

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	Score	X	Weight	=	Rating
1. Proposer's / Team Members Experience in Creation of Compensation Studies	5		.20		1.0
2. Completeness of Proposals	4		.10		0.4
3. Proposer's / Team Members Ability, Capacity and Skill of Proposer and Staff to Perform the Required Services	3		.40		1.2
4. Cost	Ø		.30		Ø

Handwritten notes: 102,800 (circled next to Cost); ⇒ 2.6 (next to 0.4)

SCORE:

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- 1 = Poor
- 2 = Fair
- 3 = Average (Included only minimum of what was asked for on subject criteria)
- 4 = Good
- 5 = Excellent

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Crowe Horwath
PART 2
EVALUATION AND AWARD

PROPOSAL EVALUATION

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	Score	X	Weight	=	Rating
1. Proposer's / Team Members Experience in Creation of Compensation Studies	4		.20		0.8
2. Completeness of Proposals	∅		.10		∅
3. Proposer's / Team Members Ability, Capacity and Skill of Proposer and Staff to Perform the Required Services	4		.40		1.6
4. Cost ^{* ISSUES OF LEGAL EXCERPTIONS} 71,750	∅		.30		∅

⇒ 2.4

SCORE:
0 = Non-Responsive
1 = Poor
2 = Fair
3 = Average (Included only minimum of what was asked for on subject criteria)
4 = Good
5 = Excellent

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*Evergreen
Sandra Howell*

**PART 2
EVALUATION AND AWARD**

PROPOSAL EVALUATION

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	Score	X	Weight	=	Rating
1. Proposer's / Team Members Experience in Creation of Compensation Studies	<u>4</u>		<u>.20</u>		<u>1.80</u>
2. Completeness of Proposals	<u>5</u>		<u>.10</u>		<u>1.50</u>
3. Proposer's / Team Members Ability, Capacity and Skill of Proposer and Staff to Perform the Required Services	<u>2.50</u>		<u>.40</u>		<u>1.00</u>
4. Cost	<u>5</u>		<u>.30</u>		<u>1.50</u>

Capacity not rated.

SCORE: 3.80
 0 = Non-Responsive
 1 = Poor
 2 = Fair
 3 = Average (Included only minimum of what was asked for on subject criteria)
 4 = Good
 5 = Excellent

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Springsted
Sandra Howell

**PART 2
EVALUATION AND AWARD**

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	Score	X	Weight	=	Rating
1. Proposer's / Team Members Experience in Creation of Compensation Studies	<u>5</u>		<u>.20</u>		<u>1.00</u>
2. Completeness of Proposals	<u>5</u>		<u>.10</u>		<u>.50</u>
3. Proposer's / Team Members Ability, Capacity and Skill of Proposer and Staff to Perform the Required Services	<u>2.5</u>		<u>.40</u>		<u>1.00</u>
4. Cost	<u>3.5</u>		<u>.30</u>		<u>1.05</u>

Capacity not rated

SCORE:

- 0 = Non-Responsive
- 1 = Poor
- 2 = Fair
- 3 = Average (Included only minimum of what was asked for on subject criteria)
- 4 = Good
- 5 = Excellent

3.55

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*Sandra Howell
The Waters
Consulting group*

**PART 2
EVALUATION AND AWARD**

PROPOSAL EVALUATION

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1. Proposer's / Team Members Experience in Creation of Compensation Studies	<u>5</u>		<u>.20</u>		<u>1.00</u>
2. Completeness of Proposals	<u>5</u>		<u>.10</u>		<u>.50</u>
3. Proposer's / Team Members Ability, Capacity and Skill of Proposer and Staff to Perform the Required Services	<u>2.5</u>		<u>.40</u>		<u>1.00</u>
4. Cost	<u>3.0</u>		<u>.30</u>		<u>.90</u>

Capacity not rated

SCORE:

- 0 = Non-Responsive
- 1 = Poor
- 2 = Fair
- 3 = Average (Included only minimum of what was asked for on subject criteria)
- 4 = Good
- 5 = Excellent

3.40

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*Sandra Howell
Crowe Horwath*

**PART 2
EVALUATION AND AWARD**

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	Score	X	Weight	=	Rating
1. Proposer's / Team Members Experience in Creation of Compensation Studies	<u>2</u>		<u>.20</u>		<u>1.40</u>
2. Completeness of Proposals	<u>2</u>		<u>.10</u>		<u>1.20</u>
3. Proposer's / Team Members Ability, Capacity and Skill of Proposer and Staff to Perform the Required Services	<u>2</u>		<u>.40</u>		<u>1.80</u>
4. Cost	<u>.50</u>		<u>.30</u>		<u>.15</u>

Capacity not rated

SCORE:

- 0 = Non-Responsive
- 1 = Poor
- 2 = Fair
- 3 = Average (Included only minimum of what was asked for on subject criteria)
- 4 = Good
- 5 = Excellent

1.55

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*Sandra Howell
milliman*

**PART 2
EVALUATION AND AWARD**

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1. Proposer's / Team Members Experience in Creation of Compensation Studies	<u>4</u>		<u>.20</u>		<u>.80</u>
2. Completeness of Proposals	<u>4</u>		<u>.10</u>		<u>.40</u>
3. Proposer's / Team Members Ability, Capacity and Skill of Proposer and Staff to Perform the Required Services	<u>2</u>		<u>.40</u>		<u>.80</u>
4. Cost	<u>0</u>		<u>.30</u>		<u>0</u>

Not rated on Capacity

2100

SCORE:

- 0 = Non-Responsive
- 1 = Poor
- 2 = Fair
- 3 = Average (Included only minimum of what was asked for on subject criteria)
- 4 = Good
- 5 = Excellent

**Numerous exceptions to contract provisions.
* No subs.
* Open to new methods
* Fee quoted on published DATA - How does this give us surrounding counties
* what does "yaks" mean or quote?*

Do not attempt to contact any Selection Committee Member, staff member or person other than Mrs. Amanda Taylor for questions relating to this project. Anyone attempting to lobby Sumter County BOCC representatives may be disqualified. The Selection Committee Members shall be: Bradley Arnold, County Administrator, Sandra Howell, Assistant County Administrator, and Kitty Fields, Human Resources Manager.

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The Selection Committee will meet to evaluate proposals in the Room 142 located at 910 North Main Street, Bushnell, FL 33513 at 10:00am on April 28, 2010.

PROPOSAL AWARD

Submitters and vendors registered through www.demandstar.com will have access to award documents via the website. All others wishing to receive an official tabulation of the results of the opening of this Proposal are to submit a self-addressed, stamped business size (No. 10) envelope. Proposal results may also be requested by telephone, fax or electronic media.

Segal
Sandra Howell

**PART 2
 EVALUATION AND AWARD**

PROPOSAL EVALUATION

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	Score	X	Weight	=	Rating
1. Proposer's / Team Members Experience in Creation of Compensation Studies	<u>4</u>		<u>.20</u>		<u>,80</u>
2. Completeness of Proposals	<u>1</u>		<u>.10</u>		<u>,10</u>
3. Proposer's / Team Members Ability, Capacity and Skill of Proposer and Staff to Perform the Required Services	<u>2</u>		<u>.40</u>		<u>,80</u>
4. Cost	<u>1.5</u>		<u>.30</u>		<u>,30</u>

Cost rate capacity not requested not provided

SCORE:

- 0 = Non-Responsive
- 1 = Poor
- 2 = Fair
- 3 = Average (Included only minimum of what was asked for on subject criteria)
- 4 = Good
- 5 = Excellent

2.00

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CPS
Sandra Howell

**PART 2
EVALUATION AND AWARD**

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	Score	X Weight	= Rating
1. Proposer's / Team Members Experience in Creation of Compensation Studies	<u>5</u>	<u>.20</u>	<u>1.00</u>
2. Completeness of Proposals	<u>4</u>	<u>.10</u>	<u>.40</u>
3. Proposer's / Team Members Ability, Capacity and Skill of Proposer and Staff to Perform the Required Services	<u>2.50</u>	<u>.40</u>	<u>1.00</u>
4. Cost	<u>1.50</u>	<u>.30</u>	<u>.45</u>

Capacity not rated

SCORE:

- 0 = Non-Responsive
- 1 = Poor
- 2 = Fair
- 3 = Average (Included only minimum of what was asked for on subject criteria)
- 4 = Good
- 5 = Excellent

14 weeks recommended
255

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*Fox Lawson
Sandra Howell*

**PART 2
EVALUATION AND AWARD**

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	Score	X	Weight	=	Rating
1. Proposer's / Team Members Experience in Creation of Compensation Studies	<u>4</u>		<u>.20</u>		<u>.80</u>
2. Completeness of Proposals	<u>2</u>		<u>.10</u>		<u>.20</u>
3. Proposer's / Team Members Ability, Capacity and Skill of Proposer and Staff to Perform the Required Services	<u>2</u>		<u>.40</u>		<u>.80</u>
4. Cost	<u>3.5</u>		<u>.30</u>		<u>1.05</u>

Can't rate capacity; information not requested nor provided.

SCORE:

- 0 = Non-Responsive
- 1 = Poor
- 2 = Fair
- 3 = Average (Included only minimum of what was asked for on subject criteria)
- 4 = Good
- 5 = Excellent

2.85

Do not attempt to contact any Selection Committee Member, staff member or person other than Mrs. Amanda Taylor for questions relating to this project. Anyone attempting to lobby Sumter County BOCC representatives may be disqualified. The Selection Committee Members shall be: Bradley Arnold, County Administrator, Sandra Howell, Assistant County Administrator, and Kitty Fields, Human Resources Manager.

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*Sandra Howell
Cody & Assoc.*

**PART 2
EVALUATION AND AWARD**

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	Score	X	Weight	=	Rating
1. Proposer's / Team Members Experience in Creation of Compensation Studies	<u>3</u>		<u>.20</u>		<u>.60</u>
2. Completeness of Proposals	<u>3</u>		<u>.10</u>		<u>.30</u>
3. Proposer's / Team Members Ability, Capacity and Skill of Proposer and Staff to Perform the Required Services	<u>2</u>		<u>.40</u>		<u>.80</u>
4. Cost	<u>4</u>		<u>.30</u>		<u>1.20</u>

Can't rate Capacity

SCORE:

- 0 = Non-Responsive
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- 2 = Fair
- 3 = Average (Included only minimum of what was asked for on subject criteria)
- 4 = Good
- 5 = Excellent

2.9

\$ 16,500

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PART 5 SCOPE OF SERVICES

The Sumter County Board of County Commissioners is requesting proposals from qualified firms for the **RFP # 153-0-2010/AT SUMTER COUNTY COMPREHENSIVE COMPENSATION STUDY**.

Background

Sumter County is located in the heart of Florida, encompassing 574 square miles, including 19 square miles of inland water. Geographically located in the center of the state, it is referred to as the "Crossroads of Central Florida." Interstate 75, US Highway 301, State Road 44, and the Florida Turnpike connect Sumter County with major metropolitan areas throughout the state. The current population is approximately 95,304. The Board of Sumter County Commissioners has 230 employees and 76 reserve firefighters.

The last compensation study the Board conducted was completed in May 2004. This plan was implemented FY 2004-2005. Since that time the Board has experienced many changes. We have experienced five (5) reductions in force since June of 2005, resulting in a reduction of 28 positions. We have also reorganized the remaining staff, including outsourcing services, to provide more efficient delivery of services to our citizens. During this time we have also continued to evolve our Fires Services into a unified Fire Services Department, with 18 Full-time Firefighters and 76 Reserve Firefighters.

The Sheriff's Department has had the second largest change in their organization with the increase in jail personnel associated with expanded facilities accommodating the past increase in inmates.

Current Issues/Concerns

The purpose of this study is to review and revise the current pay plan to effectively recruit and retain the best employees. The following issues have been identified:

- It is difficult to recruit qualified individuals for certain positions,
- When the economy changes, it will be difficult to retain qualified employees,
- Inequality in compensation for similar pay grades,

Scope of Service

The Board of Sumter County Commissioners is seeking a firm to conduct a Comprehensive Compensation Study of the appropriate labor markets within the competitive area of Sumter County, and to develop a competitive salary structure including methods of salary increases for the Commissioners consideration. This Comprehensive Compensation study will include all employees under the Board of

Sumter County Commissioners, the Clerk of the Court, the Tax Collector, the Supervisor of Elections, the Property Appraiser and the Sheriff's office. The initial Comprehensive Compensation Study must be completed and provided to Sumter County within sixty (60) days of the contract award date.

- A. Review and analyze the County's current Compensation Schedule and compare with surrounding public and private employers, with public and private employers of similar size within the State of Florida and at a national level for professional positions, and provide recommendations for improvements to achieve competitiveness as may be appropriate.
- B. Conduct a thorough and in-depth survey of total compensation program, including wages, benefits, and supplements through interviews, surveys, and reviews of pay plans from competing jurisdictions.
- C. Tabulate, summarize, and analyze comparative compensation information obtained through the pay survey. Based upon this data and comparative evaluations of the internal worth of classes of positions, prepare a recommended pay plan with rates and ranges for all classes taking into account grade, time in position and longevity, while addressing the problem of compression of pay.
- D. Evaluate if a reduction or a functional combining of position classifications is appropriate,
- E. Recommend administrative and maintenance procedures to maintain fairness and competitiveness of the recommended compensation plan as provided by the vendor.
- F. Provide recommendations related to compensation to employees who have reached the maximum of their appropriate pay range or the appropriate value of their position.
- G. Prioritize critical areas in the various position classifications that must be adjusted or revised first to avoid an impact of potential employee turnover or morale issues.
- H. Prepare implementation strategy including time line and cost impact for all recommendations.
- I. Provide on-going support for three (3) years for placement of new jobs in the classification and compensation study.

A Proposal to Conduct a
Comprehensive Compensation Study
for Sumter County, FL
RFP#153-0-2010/AT

Submitted to:

Mrs. Amanda Taylor
Budget and Purchasing Coordinator
Board of Sumter County Commissioners
Budget and Purchasing Department
910 N. Main Street
Bushnell, Florida 33513

Submitted by:



A handwritten signature in black ink, appearing to read "Dr. Jeff Ling". The signature is written over a horizontal line that spans the width of the text below it.

Dr. Jeff Ling, Executive Vice-President
Evergreen Solutions, LLC
2852 Remington Green Circle, Suite 101
Tallahassee, Florida 32308
(850) 383-0111
(850) 383-1511 fax

April 26, 2010



Evergreen Solutions, LLC

2852 Remington Green Circle, Suite 101 - Tallahassee, Florida 32308
850.383.0111 - fax 850.383.1511

April 22, 2010

Mrs. Amanda Taylor
Budget and Purchasing Coordinator
Board of Sumter County Commissioners
Budgeting and Purchasing Department
910 N. Main Street
Bushnell, Florida 33513

Dear Mrs. Taylor:

Evergreen Solutions, LLC is pleased to submit this proposal to conduct a Comprehensive Compensation Study for the Sumter County Board of County Commissioners (Sumter County). Our response is based on our review of your Request for Proposals, our understanding of the Florida labor market, our experience in working with hundreds of public sector clients, and our knowledge of best practices in human resources management.

Evergreen Solutions was formed to provide an alternative to traditional consulting firms. We provide an innovative and effective alternative by focusing on clients needing partners and not simply another service provider. Moreover, members of the team we are proposing to you have worked together for many public sector organizations throughout the country in the area of comprehensive compensation studies. Specific information about our proposed consultant team members is included in Section 1.5 of our proposal.

The Evergreen Solutions' team has worked with hundreds of public sector organizations throughout the country, especially in Florida. We have provided various human resources consulting services, including comprehensive compensation studies, to some of the following Florida public sector clients: City of Bushnell; City of Orlando; City of Bunnell; City of Ocala; Toho Water Authority; Tampa Bay Water; City of Kissimmee; City of St Cloud; Seminole County, Citrus County; Manatee County; City of Punta Gorda; City of Deltona; City of Largo; City of Lake City; Village of Islamorada; City of Venice; City of Tamarac; Town of Ponce Inlet; Town of Juno Beach; Nassau County Sheriff's Office; Clay County Sheriff's Office; Alachua County Sheriff's Office; Martin County Sheriff's Office; Keys Energy Services; Florida League of Cities; Florida Association of Counties; Bay County; City of Destin; Gadsden County; Gadsden County Property Appraiser; City of Delray Beach; City of Doral; St. Johns River Water Management District; Health Care District of Palm Beach County; and Glades General Hospital.

We are well familiar with the Sumter County area having been hired by the City of Bushnell to assist with a city-wide compensation study and provide recommendations for implementation of a revised pay plan. In addition, Evergreen was hired by the City of Ocala to assist with a city-wide compensation and classification study and provide recommendations regarding a revised pay plan.

Some of the human resource services our firm has focused on include:

- comprehensive compensation studies;
- classification studies;
- wage and salary surveys;

- disparity studies;
- classification studies;
- performance auditing;
- benefits reviews;
- operational efficiency analysis;
- performance evaluation and appraisal system design;
- recruitment, hiring, and retention studies;
- staffing studies;
- strategic and workforce planning;
- staff diversity alternative reward structures; and
- labor pool availability.

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

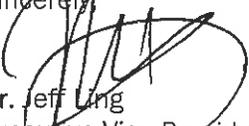
Our approach to conducting a comprehensive compensation study draws not only from extensive human resources work with public sector clients, but also from direct feedback of our past clients. In essence, we offer you tools that are innovative as well as those that have been proven to work in real places with real people. Some of the key facets of our approach include:

- We emphasize communication as the key to successful study completion as well as implementation. Our team understands that compensation by its very nature creates anxiety in staff and managers alike. In order to ensure a successful study process and “buy-in” at implementation, officials, managers, and employees need to be involved in each step of the process. This is a critical component of our communication plan.
- Our methodology utilizes the latest in technology. In order to reduce cost to our client partners and enhance wider participation, we offer all of our tools in an electronic format. In essence, every step of the process can be done on the Web.
- We understand that one size does not fit all. Some consultants provide the same overall solution to every client. 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 Executive Vice-President of Evergreen Solutions, LLC, I am authorized to commit our firm contractually to this assignment. We have reviewed your terms and conditions, and we acknowledge that we would be able to work within your requirements. In addition, Evergreen Solutions is a certified WMBE firm in more than 12 states and municipalities throughout the country, including Florida.

We appreciate this opportunity and commit to you our best effort to provide accurate and timely results. If we can answer any questions that you might have, please feel free to contact me at (850) 383-0111 or email at jeff@consultevergreen.com.

Sincerely,



Dr. Jeff Ling
Executive Vice-President
Evergreen Solutions, LLC



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Proposal

Evergreen Solutions is well-qualified to conduct a Comprehensive Compensation Study for the Sumter County Board of County Commissioners (Sumter County) due to our experience and expertise in providing similar services to other municipalities throughout the country. The following includes a brief profile of the services we provide, a listing of some of our most recent work with municipalities and other public sector organizations. In addition, we have provided you with our proposed project consultant team. We believe that this study must be conducted by senior staff who have had extensive experience in conducting similar human resources consulting work.

We have also provided you with our understanding of the project; our overall approach and methodology for completing this study; and a detailed work plan, identifying the tasks, activities, and milestones necessary to accomplish all required deliverables included in the Request for Proposals (RFP). A timeline and proposed cost for completing all required deliverables is also included.

1.1 Firm's Profile

Name of Firm	Evergreen Solutions, LLC
Address of Principal Office	2852 Remington Green Circle Suite 101 Tallahassee, FL 32308
Phone Number	(850) 383-0111
Fax Number	(850) 383-1511
Description of the Firm	LLC, woman-owned firm that is W/MBE certified in 12 states, and municipalities throughout the country, including Florida.
Date business was founded	October 2004
State of incorporation	Florida
Firm's website	www.ConsultEvergreen.com
Principal Owners	Dr. Linda Recio, President linda@consultevergreen.com Dr. Jeff Ling, Executive Vice President jeff@consultevergreen.com
Federal ID Number	20-1833438

1.2 Firm's Services

Evergreen Solutions, LLC is a national, multidisciplinary, public sector management consulting firm, which specializes in working with public sector organizations 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 to provide a modern, practical alternative to the typical consulting options. We are a group of management and human resource professionals that came together to form an innovative alternative that places clients and their needs before any individual, model, or corporate goal.

Our main focus is on people, management, and technology which allows our team to provide a broad variety of services, including, but not limited to:

Human Resources

- Comprehensive Compensation Studies
- Classifications Studies
- Performance Appraisal Reviews
- Staffing Audits
- Performance Management

Operations

- Business Process Re-engineering
- Management and Organizational Reviews
- Information Technology Consulting
- Facilities Planning and Analysis
- Strategic Planning and Facilitation
- Training Assessments

We invite you to browse our Web site at www.ConsultEvergreen.com to get more information on our services and past experience.



Clients nationwide have been successfully implementing recommendations from our team of professional consultants for decades. In the past five years, Evergreen Solutions has contracted with public sector, quasi-government, and non-profit organizations in more than 31 states throughout the country. The following is just a sample of some of the clients our consultant team has worked with that involved similar services to those being requested by Sumter County:

- Bay County, Florida;
- Manatee County, Florida;
- Seminole County, Florida;
- Citrus County, Florida;
- Gadsden County, Florida;
- Gadsden County Property Appraiser, Florida;
- Florida Association of Counties;
- Florida League of Cities;
- City of Bunnell, Florida;
- City of Bushnell, Florida;
- City of Delray Beach, Florida;



-
- City of Doral, Florida;
 - City of Ocala, Florida;
 - City of Venice, Florida;
 - City of Tamarac, Florida;
 - City of Kissimmee, Florida;
 - City of St. Cloud, Florida;
 - City of Punta Gorda, Florida;
 - City of Deltona, Florida;
 - City of Largo, Florida;
 - City of Lake City, Florida;
 - Village of Islamorada, Florida;
 - Town of Ponce Inlet, Florida;
 - Town of Juno Beach, Florida;
 - Nassau County Sheriff's Office, Florida;
 - Clay County Sheriff's Office, Florida;
 - Alachua County Sheriff's Office, Florida;
 - Martin County Sheriff's Office, Florida;
 - Keys Energy Services, Florida;
 - Toho Water Authority, Florida;
 - Tampa Bay Water, Florida;
 - Loxahatchee River County, Florida;
 - Orlando-Orange County Expressway Authority, Florida;
 - St. Johns River Water Management District, Florida;
 - Health Care District of Palm Beach County, Florida;
 - Glades General Hospital, Florida;
 - City of Kingsland, Georgia;
 - City of Riverdale, Georgia;
 - Lorain Metropolitan Housing Authority, Ohio;
 - Fort Wayne-Allen County Airport Authority, Indiana;
 - Springfield Housing Authority, Illinois;
 - City of Pittsburgh, Pennsylvania;
 - Chittenden County Regional Planning Commission, Vermont;
 - City of Kalamazoo, Michigan;
 - City of Branson, Missouri;
 - City of Columbia, Missouri;
 - Housing Authority of the City of Winston-Salem, North Carolina;
 - Norfolk Redevelopment and Housing Authority, Virginia;
 - Lutheran Family Services of Virginia, Inc.;
 - Town of Herndon, Virginia;
 - City of Suffolk, Virginia;
 - City of Newport News, Virginia;
 - City of Mauldin, South Carolina;
 - Orangeburg County, South Carolina;
 - Charleston County, South Carolina;
 - Charleston Park and Recreation Commission, South Carolina;
 - City of Austin, Texas;
 - City of Sunset Valley, Texas;



- Travis County, Texas;
- Denton County Fresh Water Supply District, Texas;
- Denton County, Texas;
- Brazos River Authority, Texas;
- BexarMet, Texas; and
- City of Santa Fe, New Mexico.

As a result of our experience in professional roles, as well as work on past projects, the Evergreen Solutions Team has considerable experience in conducting comprehensive compensation studies and related work. Full case studies or reports from any of our studies are available upon request.



1.3 Firm's Experience

The following is our firm's experience working with municipalities and other public sector organizations in providing comprehensive compensation studies and similar human resource consulting.

Projects Completed by Evergreen Solutions, LLC

Compensation Study

Client: City of Bushnell, Florida

The Evergreen Solutions team was hired by the City of Bushnell to assist with a city-wide compensation study and recommendations for implementation of a revised pay plan. The study included all employees and classifications in the City. As part of the study, the Evergreen Solutions team conducted focus groups and interviews with all employees, and all employees completed Job Assessment Tools (JATs). Evergreen Solutions consultants conducted a comprehensive salary survey of local and regional employers to assess the market competitiveness of the City. Finally, a detailed plan was developed to provide the City with specific steps to implement an equitable and competitive compensation plan.



Compensation and Classification Study

Client: Manatee County, Florida

The Evergreen Solutions team was hired by Manatee County to assist with a countywide compensation and classification study. The study included all employees that serve in capacities for the Board of County Commissioners. As part of the review, orientation sessions, focus groups, and interviews were conducted in throughout the county. All employees were asked to complete the Job Assessment Tool (JAT) and job analysis was conducted



Compensation and Classification Study

Client: City of Ocala, Florida

The Evergreen Solutions team was hired by the City of Ocala, Florida to assist with a city-wide compensation and classification study and recommendations for implementation of a revised pay plan. The study included all employees and classifications in the City. As part of the study, the Evergreen Solutions team conducted orientations, focus groups, and interviews with employees, and collected Job Assessment Tools (JATs) from employees. Evergreen Solutions consultants conducted a comprehensive salary and benefits survey of local and regional employers to assess the market competitiveness of the City. Finally, a detailed plan was developed to provide the City with specific steps to implement an equitable and competitive compensation plan.



Salary Survey

Client: Alachua County Sheriff's Office, Florida

Evergreen Solutions was hired by the Alachua County Sheriff's Office to conduct a targeted salary survey to a prescribed list of relevant target law enforcement organizations for the purpose of updating the data and recommendations of the previous study completed by Evergreen Solutions.



Compensation and Classification Study

Client: City of Bunnell, Florida

The Evergreen Solutions team was hired by the City of Bunnell to assist with a city-wide compensation and classification study and provide recommendations for implementation of a revised pay plan. The study included all employees and classifications in the City. As part of the study, the Evergreen Solutions team conducted focus groups and interviews with all employees, and all employees completed Job Assessment Tools (JATs). Evergreen Solutions consultants conducted a comprehensive salary survey of local and regional employers to assess the market competitiveness of the City. Finally, a detailed plan was developed to provide the City with specific steps to implement an equitable and competitive compensation plan.



Compensation Study

Client: Gadsden County Board of County Commissioners, Florida

The Evergreen Solutions team was hired by Gadsden County, Florida to conduct a compensation study including all employees. The Evergreen Solutions team conducted focus groups and interviews at multiple district locations, conducted a comprehensive salary survey of the regional labor market peers, and provided detailed recommendations for adjusting the County's pay structure. The Evergreen Solutions team also developed an implementation plan that included all employees.



Classification Study

Client: Osceola County, Florida

Osceola County contracted with Evergreen Solutions to conduct an assessment of current job titles for consideration of consolidation, review current pay levels based on available secondary data and review the previously recommended pay scale step plan for hourly employees. After the review of the class titles was complete, the revised classifications were slotted into the proposed pay plan. As an additional component of the study, Evergreen Solutions is providing ongoing support for the compensation and classification changes.



Compensation Study

Client: Glades General Hospital, Florida

The Evergreen Solutions team was contracted by Glades General Hospital to conduct a comprehensive compensation and classification study. Employees attended orientation sessions and focus groups at which point they shared perceptive observations as to the strengths and weaknesses of the organizations compensation and classification systems. A salary survey was conducted using a series of benchmark classifications distributed to relevant labor market peers both locally and state-wide. Job Assessment Tools (JATs) were completed by employees and were used to gauge internal equity and classification appropriateness. After analysis of JAT data was combined with findings from the salary survey, a combined solution was created which addressed issues brought to light through the process and provided the Hospital with a competitive and equitable compensation and classification plan.



Compensation and Classification Study

Client: City of Delray Beach, Florida

The Evergreen Solutions Team was hired by the City of Delray Beach to assist with a city-wide Compensation and Classification Study. The study included all non-bargaining employees that serve in capacities for the City. As part of the review, orientation sessions, focus groups, and interviews were conducted in throughout the City, to gauge leadership and employee perceptions, opinions, and concerns about the pay and classification structure in the City. All employees were asked to complete the Job Assessment Tool (JAT) and job analysis was conducted with the results in order to create a classification plan. A salary survey was issued to local and regional employers to assess competitiveness. Based on the classification and compensation findings, a new pay plan as well as policies and procedures were recommended to the City.



Comprehensive Compensation and Classification Study

Client: Orlando-Orange County Expressway Authority, Florida

The Orlando-Orange County Expressway Authority (OOCEA) has retained Evergreen Solutions to conduct a comprehensive compensation and classification study to determine if the OOCEA possesses a compensation and classification system that is both equitable as compared to the external competitive employment market as well as equitable internally.

The study will include complete classification analysis using the Job Assessment Tool job valuation methodology as well as a statistical assessment of internal conditions and an assessment of external equity including a salary survey of competing organizations. The report will culminate with a series of findings and recommendations designed to alleviate any strains on the system and, if necessary, redesign or augment the existing system in place at the OOCEA.



Salary Survey of Union Positions

Client: Keys Energy Services, Florida

Keys Energy Services contracted with Evergreen Solutions to conduct a targeted salary survey and external equity analysis of its union classifications. Evergreen Solutions consultants utilized best practices methodology in collecting, summarizing and presenting data, translated those findings into recommendations and providing the Keys Energy Service with data necessary to maintain competitive market position.



Classification, Compensation, and Staffing Study

Client: City of Lake City, Florida

Evergreen Solutions was hired by the City of Lake City to conduct a Classification, Compensation, and Staffing Study impacting all city employees (approximately 270). The study included recommendations for implementation and administration of a revised pay plan. The study included all employees and classifications in the City. As part of the study, the Evergreen Solutions Team conducted onsite orientation sessions and focus groups with all available employees, and employees completed Job Assessment Tools (JATs). Evergreen Solutions consultants conducted a comprehensive salary survey of local and regional employers to assess the market competitiveness of the City. Finally, a detailed plan was developed to provide the City with specific steps to implement an equitable and competitive compensation plan.



Employee Total Compensation Study

Client: Loxahatchee River District, Florida

The Loxahatchee River District retained Evergreen Solutions to conduct an Employee Total Compensation Study. The purpose of the study was to evaluate the current marketplace competitiveness of the District's employee salary and benefits compensation practices and to provide recommendations to ensure that the District's employee total compensation plan is sufficiently adequate to attract and retain a qualified and productive workforce.

As part of the study, Evergreen Solutions evaluated the District's existing wage and salary ranges and employee benefits plan; evaluated the current market competitiveness of the District's wage and salary ranges for all job classifications; evaluated the current market competitiveness of the District's employee benefits plan; and made recommendations for adjustment of the District's wage and salary ranges for all job

classifications and for modifications to the employee benefits plan to ensure their market competitiveness.



Job Classification, Compensation, and Benefits Survey

Client: City of Venice, Florida

The Evergreen Solutions team was hired by the City of Venice, Florida to assist with a city-wide Job Classification, Compensation, and Benefits Survey. The study included over 300 employees that serve in various capacities for the City, including several collective bargaining units representing City employees. As part of the study, orientation sessions, focus



groups, and interviews were conducted throughout the City. All employees were asked to complete the Job Assessment Tool (JAT) and Evergreen consultants conducted comprehensive job analysis in order to create an internally equitable classification plan. A salary survey was issued to local and regional employers to assess competitiveness. Based on the classification and compensation findings, Evergreen Solutions recommended a new pay plan as well as policies and procedures to the City.



Salary Survey of Union Positions

Client: Keys Energy Services, Florida

Keys Energy Services contracted with Evergreen Solutions to conduct a targeted salary survey and external equity analysis of its union classifications. Evergreen Solutions consultants utilized best practices methodology in collecting, summarizing and presenting data, translated those findings into recommendations and providing the Keys Energy Service with data necessary to maintain competitive market position.



Compensation and Classification Study

Client: Tampa Bay Water Authority, Florida

Evergreen Solutions assisted the Tampa Bay Water Authority with reviewing its current compensation and classification system. The study included a market assessment, review of current jobs, and recommendations for system improvement. In addition, Evergreen Solutions was hired in 2009 to provide maintenance to the system.



Compensation And Classification Study

Client: Health Care District of Palm Beach, Florida

Evergreen Solutions was hired by the Palm Beach County Health Care District to conduct a Comprehensive Compensation and Classification Study. The Evergreen Solutions Team conducted employee orientations, focus groups and interviews, and conducted job analysis of all included positions. Evergreen Solutions conducted a comprehensive salary survey of regional and statewide labor market peers to properly assess the District's competitive position. As a result of the study, Evergreen Solutions provided customized and detailed recommendations for adjusting the District's compensation and classification structures and developed implementation options that are equitable and cost efficient.



Compensation and Classification Study

Client: Community Action Stops Abuse, Florida

Evergreen Solutions was hired by Community Action Stops Abuse (CASA) to conduct a comprehensive compensation and classification study for all employees and job classifications. The Evergreen Solutions team conducted employee orientations and focus groups at CASA's offices in St. Petersburg, FL, conducted job analyses of all included positions, conducted a comprehensive salary survey of the regional and statewide labor market peers, and provided detailed recommendations for adjusting the Organization's pay and classification structure. The Evergreen Solutions team also developed an implementation plan and cost plan.



Compensation Study

Client: The Chittenden County Metropolitan Planning Organization and the Chittenden County Regional Planning Commission, Vermont

The Chittenden County Regional Planning Commission (CCRPC) has retained Evergreen Solutions to conduct a Compensation Study for the Chittenden County Metropolitan Planning Organization (CCMPO) and Chittenden County Regional Planning Commission (CCRPC). As part of the study, Evergreen Solutions will develop one set of competitive salary ranges for the two organizations; simplify the number of position categories; and examine the total compensation information (including benefits) of the organizations in comparison to their market peers.



Comprehensive Compensation Study

Client: Allegany County, Maryland

Allegany County contracted with Evergreen Solutions to conduct a comprehensive compensation study and analysis for the Office of the Sheriff. The Office of the Sheriff included the primary functional areas of Road Patrol and Correction Deputies at the county correctional facility. Evergreen Solutions understood that the Office of the Sheriff faced competitive pressure from other area law enforcement agencies and, therefore, designed a salary survey instrument for distribution to an approved list of local peers. This survey took into account total compensation including supplemental pay, insurance benefits, retirement, leave and other tangible benefits. The results of this survey and the subsequently prepared report provided the County with recommendations designed to improve their competitive position and ability to recruit the best and brightest available workers for these key areas.



Compensation and Classification Study

Client: City of Mauldin, South Carolina

The City of Mauldin has retained Evergreen Solutions to provide oversight into the data collection process regarding compensation and classification as well as provide recommendations following the collection of the data for the City to transition into a purely merit-based pay system. The purpose of the study is to review the current structure that has not been updated in the last few years utilizing the position rating manual and position analysis questionnaire; review the salary survey methods and results collected from local municipalities and national IMCA data; verify overall grade placement and internal equity for the organization as a whole; ensure external equity with the marketplace; and provide oversight on transition to performance management, merit-pay system.

As part of the study, Evergreen Solutions will review the materials provided by the City and give feedback on best practices and market trends; analyze internal equity data collected by City and give feedback to address internal equity; review salary survey data collected by the City for accuracy and provide insight regarding findings; develop the strategic position for the City utilizing collected data and desired intentions of the City; and assist the City with developing transition plan.



Compensation, Classifications and Benefits Study

Client: Denton County, Texas

Evergreen Solutions conducted a Comprehensive Compensation, Classification and Benefits Study for the more than 1,550 employees of Denton County, Texas. Denton County had not performed a comprehensive classification and compensation study in 15 years. Evergreen Solutions conducted employee orientations, focus groups and interviews, and conducted job analysis of all included positions. This was information used to create an internal equity alignment that is consistent with current job duties and responsibilities.

As part of the project, Evergreen Solutions conducted a comprehensive salary and benefits survey of local and regional labor market peers to properly assess the County's competitive position for wages and benefits. Evergreen Solutions provided customized and detailed recommendations for adjusting the County's compensation and classification structures based on internal and external equity. Implementation options that are equitable and cost efficient were developed and additional recommendations for maintaining the system over time were also provided. Additionally, revised classification descriptions with FLSA determinations were provided.



Compensation Analysis

Client: Travis County, Texas

Evergreen Solutions assisted the Travis County Human Resources Department in determining the appropriate pay levels for all non-sheriff's office law enforcement personnel. Classifications reviewed included all Constable positions, Park Ranger positions and Investigators and Investigator Lieutenants in the County's Attorney's Office and District Attorney's Office. Evergreen Solutions conducted a preliminary review of the current compensation structure, met with County departments to discuss compensation issues, analyzed existing market data, and conducted an analysis of the internal equity relationships between the respective law enforcement agencies and similar positions residing within the Travis County Sheriff's Office. As a result of the study, Evergreen Solutions presented the County with recommendations for changes to the County's non-TCSO pay scale, classification changes, and a three-year implementation plan to bring non-TCSO jobs into proper alignment with TCSO positions. The study solidified internal equity relationships while ensuring the County was competitive with current market conditions



Salary and Benefits Study

Client: Bexar Metropolitan Water District, Texas

The Bexar Metropolitan Water District (BexarMet) retained Evergreen Solutions to conduct a salary and benefits survey to determine if BexarMet is offering salaries and benefits that are within an appropriate competitive range. The study provided BexarMet with recommendations related to external equity while still ensuring that internal equity was maintained.

The study included a review of the analysis conducted on the market data, recommendations based on the compensation structure, development of specific compensation recommendations, and creation of a strategic direction for BexarMet to use in implementing the proposed compensation system.



Classification and Compensation Study

Client: City of Sunset Valley, Texas

The Evergreen Solutions Team was hired by the City of Sunset Valley, Texas, to assist with a city-wide Classification and Compensation Study, as well as development of a Performance Evaluation System. The study also included a Human Resources Audit and recommendations to strategically align the processes, procedures, staffing, and organization of human resources functions. All employees and classifications in the City were included in the study. As part of the study, the Evergreen Solutions team



conducted interviews and focus groups with all City employees. Evergreen Solutions consultants conducted a comprehensive salary survey of local and regional employers to assess the market competitiveness of the City. Finally, a detailed plan was developed to provide the City with specific steps to implement an equitable and competitive compensation plan.



Compensation Market Review and Classification Study

Client: City of Austin, Texas

Evergreen Solutions was hired by the City of Austin to review its classification system for the Human Resources job family. The review covered 46 separate job classifications and 222 employees working in the human resources field either in the Human Resources Department or within the City's other departments. The study's primary purpose was to review the City's classification structure for its human resources jobs and ensure that all employees working in the human resources area were properly classified based upon the work they performed. To accomplish this purpose, Evergreen Solutions met with each Human Resources Manager and conducted extensive outreach sessions (desk audits) with a large percentage of human resources employees.

In addition to the interviews and desk audits, Evergreen Solutions consultants reviewed Position Analysis Questionnaires (PAQs), job descriptions, organizational charts, and other documentation. The job analysis resulted in recommendations for a job hierarchy within the Human Resources family and the slotting of each individual within the proposed classification system. Evergreen Solutions consultants also worked with the Human Resources Department to ensure that the proposed classification system properly aligned with the compensation system. At the conclusion of the study, job descriptions were revised for each job and FLSA exempt status were provided for each job classification.



Comprehensive Compensation and Classification Study

Client: City of Santa Fe, New Mexico

Evergreen Solutions was hired by the City of Santa Fe to conduct a comprehensive compensation and classification study for all City employees, including non-bargaining employees and those covered by collective bargaining agreements. The Evergreen Solutions Team conducted orientations and focus groups with general employees, and interviews with department directors and other executive managers. Employees completed Job Assessment Tools, and supervisors completed Management Issues Tools, as needed. The data gathered through this process resulted in JAT scores for each job title, placement of each job into an internal hierarchy, and recommendations for revision to the current classification structure.



Evergreen Solutions worked with City Human Resources staff to conduct a comprehensive salary survey. The results were combined with the internal hierarchy to help generate recommendations for a comprehensive compensation and classification structure. The Evergreen Solutions Team provided detailed recommendations for implementation of the new structure and related employee salary adjustments. Finally, Evergreen Solutions assisted the City with implementation of a revised performance assessment system, including conducting training with supervisors and staff, and creating and distributing performance appraisal factor weighting forms.



Compensation and Classification Study

Client: City of Branson, Missouri

The City of Branson has retained Evergreen Solutions to conduct a comprehensive compensation and classification study to determine if the City possesses a compensation and classification system that is both equitable as compared to the external competitive employment market as well as equitable internally. The study will include complete classification analysis using the Job Assessment Tool job valuation methodology as well as a statistical assessment of internal conditions and an assessment of external equity including a salary survey of competing organizations. The report will culminate with a series of findings and recommendations designed to alleviate any strains on the system and, if necessary, redesign or augment the existing system in place at the City of Branson.



Comprehensive Compensation and Classification Study

Client: Jefferson County, Missouri

Jefferson County has retained Evergreen Solutions to conduct a comprehensive compensation and classification study to analyze the County's market competitiveness and internal equity.

Located just 40 miles southwest of the City of St. Louis, Jefferson County possesses a unique set of challenges being on the border of more rural, suburban, and even metropolitan markets. Maintaining market competitive compensation and classification plans in these environments requires special effort.

The study will include comprehensive classification analysis using the Job Assessment Tool job valuation methodology in addition to a statistical assessment of current conditions. An assessment of external equity including a salary survey of competing organizations will also be conducted. The project will conclude with a series of findings and recommendations designed to alleviate any strains on the system and, if necessary, redesign the existing system in place for the County.



Classification and Compensation Analysis. Job Description Appraisals. and Compensation Plan Update

Client: Lorain Metropolitan Housing Authority, Ohio

Evergreen Solutions was hired by the Lorain Metropolitan Housing Authority (LMHA) to provide a comprehensive classification and compensation analysis of all LMHA job classifications. In addition to conducting job analysis for all LMHA job classifications, Evergreen reviewed the market pricing for each classification and developed a pay plan that provided for proper internal and external equity relationships. Evergreen Solutions also developed revised classification descriptions that reflected the work performed and correct FLSA status. In addition to the compensation and classification component of the study, Evergreen Solutions reviewed LMHA's performance evaluation tools and scoring system and made recommendations for improvement to the existing system to help better align pay with performance.



Comprehensive Study of Positions within Pittsburgh City Government

Client: City of Pittsburgh, Pennsylvania

Evergreen Solutions was hired by the City of Pittsburgh to conduct a Gender Disparity Study to evaluate the relative fairness and internal equity of the current classification and compensation system. The study included a review of the current system specifically focusing on: analysis of the existing position/job analysis tools; analysis of the classification process and issues of internal pay equity; and analysis of the reliability of the current job classification rating system in producing equitable classification and pay relationships among all employees regardless of gender or other bias. The study concluded with a comprehensive report of findings and recommendations presented to the City Council and Director of Personnel.



Compensation and Classification Study

Client: City of Kingsland, Georgia

Evergreen Solutions was hired by the City of Kingsland to assist with a city-wide compensation and classification study and recommendations for implementation of a revised pay plan. The study included all employees and classifications in the City. As part of the study, the Evergreen Solutions team conducted focus groups and interviews with employees, and employees completed Job Assessment Tools (JATs). Evergreen Solutions consultants conducted a comprehensive salary survey of local and regional employers to assess the market competitiveness of the City.



Finally, a detailed plan was developed to provide the City with specific steps to implement an equitable and competitive compensation plan.



Salary Comparability Study

Client: Springfield Housing Authority, Illinois

Evergreen Solutions LLC was hired by Springfield Housing Authority (SHA) to conduct a comprehensive compensation survey of the external regional labor market for all SHA positions and to make recommendations for changes to the current salary structure or adoption of a newly designed compensation system which assures internal equity and external competitiveness.



Job Evaluation and Wage Survey Analysis

Client: Fort Wayne Allen County Airport Authority, Indiana

Evergreen Solutions was hired by the Fort Wayne-Allen County Airport Authority to conduct a Job Evaluation and Wage Survey Analysis and provide recommendations for implementation of a revised plan. This analysis included a review of the existing job classifications and pay plan. As part of the analysis, Evergreen Solutions conducted a project orientation to management and employees, focus groups, interviews with employees, the administration of a Job Assessment Tool, and a comprehensive salary survey of local and regional employees to assess the market competitiveness of the Authority. A final report detailing recommended classification and pay plan revisions was provided.



Job Comparability Study

Client: City of Newport News and Newport News Sheriffs Office, Virginia

The Evergreen Solutions team was hired by the City of Newport News and the Newport News Sheriffs Office to conduct a Job Comparability Study of selected positions. The project involved assessing the comparability of NNSO ranking positions (Deputy, Sergeant, Lieutenant, Captain, Major, Deputy Chief) against similar positions in the Newport News Police Department, Parks Department, and Adult Corrections Department. As an additional element of the analysis, Evergreen Solutions conducted a market salary survey of regional sheriffs' offices to assess the competitive position of NNSO against regional peers.



Compensation and Classification Study

Client: City of Suffolk, Virginia

Evergreen Solutions, LLC was hired by the City of Suffolk, Virginia to conduct a compensation and classification study. Evergreen Consultants assessed both internal and external equity of the City's compensation and classification plan, and provided recommendations for a new plan to cover the City's approximate 1,000 employees. Evergreen Solutions provided Job Assessment Tool (JAT) completion support for several departments as part of the initial phase of the project. A market assessment was conducted taking into account local as well as regional peers to assess the current market position of the City. Evergreen utilized the JobForce Web module to provide the City with comprehensive recommendations that moved the City to a more 21st century structure of human resource management.



Compensation and Classification Study

Client: Lutheran Family Services of Virginia

Evergreen Solutions, LLC was hired by Lutheran Family Services of Virginia to assist with a compensation and classification study for all instructional and non-instructional staff. Six sites were visited, JATs were collected, and a state level market survey was conducted before providing a comprehensive solution.



Comprehensive Compensation and Classification Study

Client: Norfolk Redevelopment and Housing Authority, Norfolk, Virginia

Evergreen Solutions was hired by the Norfolk Redevelopment and Housing Authority (NRHA) to conduct a Comprehensive Compensation and Classification Study of all jobs in the organization. As part of the study, Evergreen Solutions, LLC was tasked to:

- review compensation-related documents provided by NRHA;
- prepare a comprehensive compensation policy based on interviews with and/or documents created by NRHA management;
- conduct a systematic job analysis of all NRHA jobs;
- prepare and submit job descriptions in written and electronic form for each job studied;



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- submit in written form the identification of the exempt or non-exempt status of each NRHA job per the requirements of the Fair Labor Standards Act (FLSA);
 - conduct a market pay study to determine competitive market pay rates for NRHA jobs, and then submit a written report to the NRHA Management;
 - conduct a job evaluation study to determine the relative internal values of NRHA jobs, and then submit a written report to NRHA management;
 - prepare and submit an internally consistent, externally competitive, and strategically congruent pay system;
 - submit in written form a recommended payroll budget based on the proposed pay system; and
 - submit in written form a recommended implementation plan based on the proposed pay system and discussions with NRHA. The implementation plan will include timelines, recommended compensation policies and procedures, cost baselines, and a description of the benefits of the proposed pay structure.



Comprehensive Compensation and Classification Study

Client: Charleston County Park and Recreation Commission, South Carolina

Evergreen Solutions was hired by the Charleston County Park and Recreation Commission (CCPRC) to conduct a comprehensive compensation and classification study of all employees in the organization. As part of the study, Evergreen Solutions conducted orientations for all employees, focus groups with a sample of employees, and interviews and small focus groups with division directors. Next, the Evergreen Solutions team collected Job Assessment Tools and Management Issues Tools from employees, as well as detailed pay range and pay rate information from market peer organizations. This information was combined and analyzed via regression analysis in order to provide recommendations for placement of each position into the proposed pay structure. At the conclusion of the study, Evergreen Solutions provided the CCPRC with a detailed plan for implementation of the proposed changes, revised job descriptions including FLSA determinations, and a final report detailing our findings and recommendations.



1.4 Firm's References

As required in the RFP, attached in the **Appendix** is the Statement of Reference and Similar Project Experience Form identifying a list of three references that we feel demonstrate the breadth and quality of the work our consultant team has performed. We chose these references because they involved similar services to those being requested by Sumter County. We invite you to contact our client references as to the quality and timeliness of our consulting projects. Full case studies on any of our engagements or additional references are available upon request.



1.5 Proposed Project Team

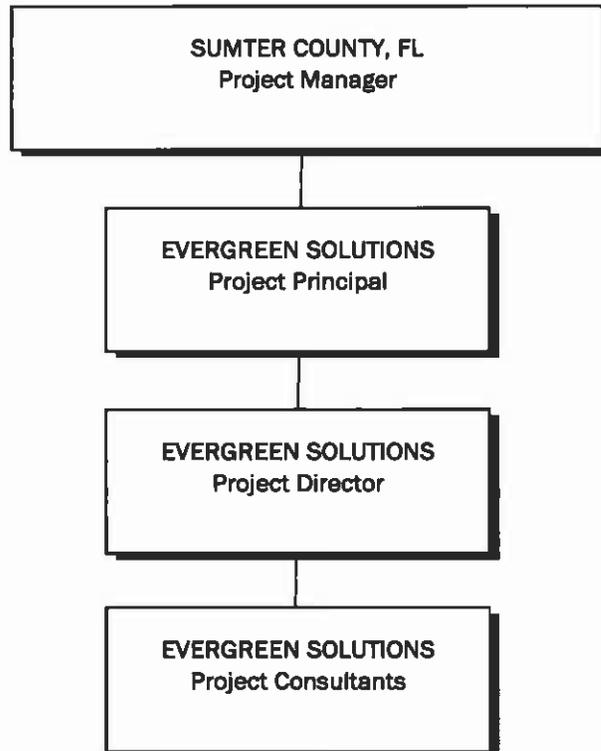
In this section we provide you with our proposed project consultant team. We believe that this study must be conducted by senior staff who have had extensive experience in conducting similar human resources consulting work. We have also provided the qualifications and experience of our consultant team through our background and similar project work we have successfully conducted for municipalities and other public sector organizations.

Exhibit 1-1 shows our proposed project management organization. The structure has been designed to clearly fix the roles and responsibilities of each part of the study so that there will be no confusion as to who is responsible for any aspect of this engagement. The structure has been designed to clearly fix the roles and responsibilities of each part of the study so that there will be no confusion as to who is responsible for any aspect of this engagement.



**Exhibit 1-1
Sumter County
Comprehensive
Compensation
Study**

**Proposed Project
Organizational
Structure**



Sumter County Project Manager. With each project engagement, we work with the client to identify one specific point of contact to serve as a Client Project Manager. The Client Project Manager (CPM) will be our reference point throughout the engagement – we will take project direction, leadership, and guidance from the CPM – all project deliverables will be filtered through the CPM throughout the duration of the project.

Evergreen Solutions Project Principal. Our Project Principal will have ultimate accountability for the success of this project. Evergreen Solutions Project Principal is always a senior leader in our firm, most often a Vice President or higher. The Project Principal will have contractual authority over the contract, and will be our top level of project responsibility. Our Project Principal has more than 18 years of experience related to comprehensive compensation studies.

Evergreen Solutions Project Director. In addition to our Project Principal, Evergreen Solutions assigns a Project Director for each engagement. The Project Director is the day-to-day lead for the engagement, and will typically maintain the most frequent contact with the client throughout the course of the project. The Project Director will develop all scheduling of the project (with the CPM), assign all project activities to Project Consultants, and ensure that the project proceeds according to schedule.



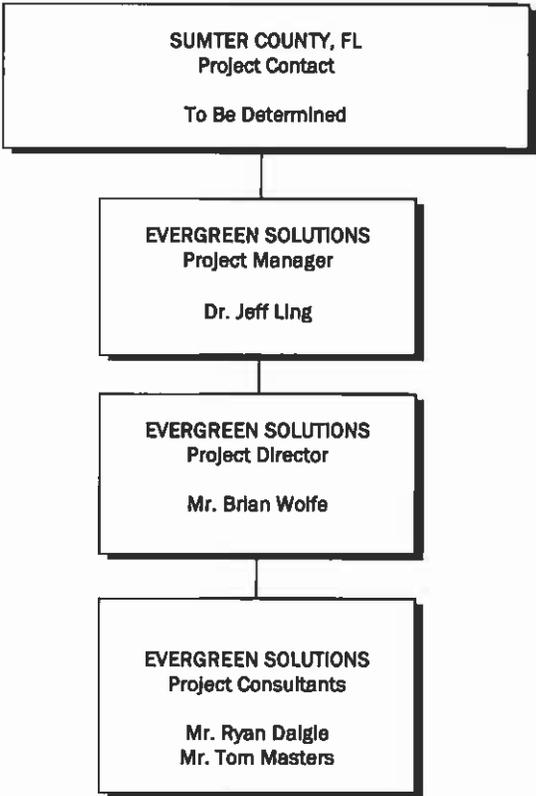
Project Consultants. Our Project Consultants are a team of consultants who have worked together on numerous projects, and who will provide consulting and analytical work on all project activities. The Project Consultants will conduct orientation and focus group sessions, collect the data for the market survey, and develop draft materials for the Project Director to review and approve.

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

Exhibit 1-2 provides the proposed personnel assignments for the requested professional consulting services. The team proposed to Sumter County regularly works together on human resources consulting engagements.

**Exhibit 1-2
Sumter County
Comprehensive
Compensation
Study**

**Proposed
Personnel
Assignments**



Key Personnel

The following paragraphs provide summaries of each team member's qualifications and experience related to his role in the study. Detailed resumes of our consultant team are available upon request.

Project Principal Dr. Jeffrey Ling

Dr. Ling is Executive Vice-President of Evergreen Solutions. He has over 19 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. Dr. Ling has consulting experience in higher education, state and local government 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 and Director. He has worked on hundreds of engagements across the nation and includes work in state and local government, 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 a number of engagements. His background and skill set make him uniquely qualified for assessing organizational critical needs and strategy. He is an expert in policy development and long-term planning.

A sample of the types of studies he has been involved with include:

- *Compensation/Classification* – He developed the methodology and techniques for organizations to employee for successful data collection and implementation based on internal and external equity needs.
- *Management and Process Reviews* – He developed and employed the methodology for assessing the strategic alignment used by public sector employers. He provided guidance as well as feedback regarding future growth and potential cost savings for a number of diverse organizations across the country including but not limited to the following: Seminole County, FL; Town of Colchester, VT; City of Fountain, CO; Nebraska Department of Health and Human Services; Guam Public School System; Los Angeles Unified School District, CA; Duplin County Board of County Commissioners, NC; and Philadelphia Public Schools, PA.



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- *Strategic Planning* – He led a number of research teams on engagements to create workforce strategic plans including compensation, workforce design, and development. For example, he assisted in developing the methodology and approach utilized for successful implementation of a strategic plan for the following: Florida Department of Management Services; Health Care District of Palm Beach, FL; City of Fountain, CO; and the Florida Association of Counties.
 - *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.
 - *Performance Evaluation* – He has provided the framework for many organizations transitioning into goal based performance evaluation systems or fully functional merit-based pay structures. He understands the importance of a well stratified, objective based review process and has been instrumental in assisting a number of large organizations transition from traditional systems into merit-based pay structures with minimal transitional costs and interruption. Some of the public organizations he has provides these service to include, but are not limited to, the following: City of Cape Coral, FL; Heath Care District of Palm Beach, FL; and the City of Riverdale, GA.
 - *Gender/Race Audits* – He developed the methodology and procedures for assessing an organization's diversity (race and gender) makeup in regards to market demographics. His methodology is objective-based and legally defensible and allows for custom feedback given the individual needs of the organization.
 - *Change Management Studies* – He developed a comprehensive change management plan for the Florida Department of Business and Professional Regulation's document imaging initiative.
 - *Employee Trainings* – He has worked with local governments such as the City of Destin, FL and the City of Tallahassee, FL in providing the following training sessions: How to Conduct an Environmental Scan; Strategic Planning Facilitation; Doing More with Less; Emotional Intelligence; and Goal Setting.



In the State of Florida, Dr. Ling was the Project Principal for more than 50 human resource projects related to compensation studies.

Dr. Ling holds a Doctorate's Degree from Florida State University in Political Science and is Executive Vice President of Evergreen Solutions, LLC. He has taught courses addressing research methodology, statistical analysis, technological innovations, and political economy at various universities.



**Project
Director
Mr. Brian Wolfe**

Brian Wolfe is a Manager with Evergreen Solutions and serves as a Project Director for human resources studies. For example, Mr. Wolfe; served as Project Director for a compensation and classification study for the City of Santa Fe, NM; for a compensation and classification study for the Orlando - Orange County Expressway Authority, Orlando, FL; for a performance management system evaluation and design project for the City of Riverdale, GA; in charge of department evaluation in a comprehensive management review for the Human Resources Department at Martinsville City Schools, Martinsville, VA; and for an Employee Satisfaction Study for the City of Columbia, MO.

Mr. Wolfe has worked with Evergreen Solutions since 2005 and has participated in the human resources practice at all levels ranging from data collection and analysis to project management. Prior to joining Evergreen Solutions, Mr. Wolfe worked in the private sector dealing with risk management and employee benefits. In his current role as a Manager with the firm, he oversees the implementation of project work plans, deliverables and client relations. His long history of developing and maintaining strong client relationships blends well with his work with human resources functions.

As a project consultant and leader of over 30 project teams, he has personally conducted every level of statistical analysis dealing with assessing clients compensation and classification systems. The differences between clients and their unique situations allow him to express his creativity in problem solving and his commitment to generating positive results. In dealing with compensation and classification analysis, ensuring that both internal and external equity are adequately assessed and that a balanced approach is followed to ensure that his clients find themselves in a markedly better position post-engagement than they were when they began the study.

Performance management system assessment and development is another area of expertise for Mr. Wolfe. He has participated in the development of many comprehensive solutions including evaluation form and policy creation and pay for performance system development. He has assisted clients in the selection and implementation process for automating these processes as he did in Seminole County, FL in the agency's implementation of such a system.



**Project
Consultant
Mr. Ryan Daigle**

He finds the recent cultural changes taking place in government to provide ample opportunities for the public sector to adopt approaches to compensation and performance that have historically been the primary domain of the private sector.

In addition to working in specific functional areas of human resources consulting, Mr. Wolfe has a depth of experience of evaluating the overall effectiveness of entire human resource departments. His past work with school districts, cities, and counties in this capacity has led him to have a complete understanding of practical operations, legal compliance, and human resources best practices in assessing the effectiveness of these departments.

Overall, Mr. Wolfe enjoys bringing his unique perspective and creative thinking to each consulting engagement he participates in and values the personal relationships he builds with Evergreen's clients.

Mr. Daigle has extensive experience in conducting human resources studies. He has broad-based knowledge of data collection and analysis, and understands the role of accurate data to the success of a project. Further, he is experienced in qualitative data collection through focus groups and interviews, as well as quantitative data collection. His expertise includes conducting salary surveys, creating solutions, developing job descriptions, and determining FLSA exemption status. He is proficient in Microsoft Office, Simmons, and SPSS and is an FLSA Certified Administrator.

Mr. Daigle has worked with a multitude of clients in the capacity of both Project Director and Consultant. He has worked on over 70 engagements across the nation and includes work in state and local government, school districts, institutions of higher education, and quasi-governmental agencies. His diverse experience provides a firm basis for guiding implementation plans and possible outcomes. Mr. Daigle specializes in ensuring that outcomes match market conditions and the relative needs of each individual organization.

A sample of the types of studies he has been involved with include:

- *Compensation/Classification* - He helped restructure a large number of organizations to assess internal and external equity while limiting the fiscal impact for each client. For example, he recently helped the Loxahatchee River District, Florida assess its market competitiveness and led the team responsible for addressing the major issues with the District's compensation structure, including compression issues, employees paid above the maximum salary range, and need for market competitiveness in relation to total compensation (salary and benefits). He has worked with 71 clients in 16 states since he came on board with Evergreen Solutions.



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- *Management and Process Reviews* – He has a firm understanding of organizational needs for public sector clients. He played a pivotal role in identifying cost savings and process revisions for the Nebraska Department of Health and Human Services and the Town of Colchester, Vermont.
 - *Market Research* – He has a firm background in developing data collection tools and techniques to assist with survey administration and facilitating interviews. He assisted with data gathering and ensuring that all data collection was conducted using statistically viable methods for the City of Pittsburgh, Pennsylvania and the Town of Gilbert, Arizona.
 - *Policy Development* – He has assisted many organizations develop tailored policies to meet the unique needs of the each organization using information gathered from focus groups, interviews, market trends, and research. Recently, he assisted the City of Venice, Florida with developing policies and procedures for reclassifying positions through the use of a review committee and stratified criteria for change.
 - *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 assisted the Healthcare District of Palm Beach, FL and the City of Riverdale, Georgia with developing the transition plan and relative needs for successful implementation of a fully stratified performance evaluation system. Implementation included the use of tools, training, policies, and oversight necessary for full integration.
 - *Strategic Planning* – He has conducted research, performed trend analysis, and consulted a number of organizations in developing a forward-thinking vision and mission statement and functional strategic plan. He assisted the Florida Department of Management Services develop an action driven five year strategic plan.

Mr. Daigle holds a bachelor's and master's degree in marketing and integrated marketing communication.



**Project
Consultant
Mr. Tom Masters**

Tom Masters, an Analyst at Evergreen Solutions, has been a staff member since July 2009. Mr. Masters' unique skills and knowledge of Human Resources stem from his involvement and interaction with the Society for Human Resource Management, as well as his degree from Florida State University in Business Management. While at Evergreen he has participated in a number of Human Resources studies across the country.



Mr. Masters' specific experience is with data collection and analysis for public sector organizations—primarily local and state governments, school districts, colleges and universities, and housing authorities. He is familiar with quantitative and qualitative data collection methods and disseminating large amounts of data. In addition, he has experience conducting market research activities. He also has a thorough understanding of Evergreen Solutions' compensation and classification study process having executed many salary surveys and developed and revised hundreds of job descriptions.

The multitude of HR-related studies that Mr. Masters has participated in are diverse in nature. Recent Human Resources engagements in which Mr. Masters has been involved include:

Compensation and Classification Studies in which organizations were assessed to ensure their compensation and classification system is both equitable as compared to the external competitive employment market as well as equitable internally. Mr. Masters recently assisted with a study in Denton County, Texas, where new pay plans were formulated and the number of classifications were consolidated from 370 titles to 261 titles.

Financial Reviews in which a detailed analysis of all of the client's financial management functions, including payroll, internal allocation of resources, internal controls, impact of federal and state reporting requirements, discretionary spending, use of technology to support financial functions, use of grant funds, procurement, and travel expenditures was evaluated for efficiency. Mr. Masters participated in a financial review of the Duplin County School System in North Carolina where the organization and management of a number of departments was evaluated; including, but not limited to the human resources, food service, transportation, and facilities functions. The study concluded with an identification of over \$6 million dollars in cost savings for the Duplin County School System.

Performance Evaluations/Job Description Appraisals included revising classification descriptions to reflect the work performed and correct FLSA status of all organizational positions. In addition, these studies involve review of an organization's performance evaluation tools and scoring system and recommendations are generally made for improvement to the existing system to help better align pay with performance. Mr. Masters participated in a study with Lorain Metropolitan Housing Authority in Ohio in which a long-standing, longevity-based salary adjustment to update salaries was replaced with a merit-based system to match the cultural dynamics of the organization.

Mr. Masters understands the dynamics and variations that exist in public sector Human Resources and is uniquely qualified to provide specialized research and analysis for related projects. He is versed with the management tools that exist to improve operations of public sector



1.6 Project Understanding

organizations and has experience with using findings to implement change. The projects listed above are limited to a few of the unique Human Resource related initiatives that Mr. Masters has participated in.

Evergreen Solutions understands that the Sumter County Board of County Commissioners is seeking a firm to conduct a Comprehensive Compensation Study of the appropriate labor markets within the competitive area of Sumter County, and to develop a competitive salary structure including methods of salary increases for the Commission's consideration. The Study will include all employees under the Board of Sumter County Commissioners, the Clerk of the Court, the Tax Collector, the Supervisor of Elections, the Property Appraiser, and the Sheriff's Office.

Sumter County is specifically looking for the following tasks to be accomplished:

- *review and analyze the County's current Compensation Schedule and compare with surrounding public and private employers, with public and private employers of similar size within the State of Florida and at a national level for professional positions, and provide recommendations for improvements to achieve competitiveness as may be appropriate;*
- *conduct a thorough and in-depth survey of total compensation program, including wages, benefits, and supplements through interviews, surveys, and reviews of pay plans from competing jurisdictions;*
- *tabulate, summarize, and analyze comparative compensation information obtained through the pay survey. Based upon this data and comparative evaluations of the internal worth of classes of positions, prepare a recommended pay plan with rates and ranges for all classes taking into account grade, time in position and longevity, while addressing the problem of compression of pay;*
- *evaluate if a reduction or a functional combining of position classifications is appropriate;*
- *recommend administrative and maintenance procedures to maintain fairness and competitiveness of the recommended compensation plan as provided by the vendor;*
- *provide recommendations related to compensation to employees who have reached the maximum of their appropriate pay range or the appropriate value of their position;*



1.7 Evergreen's Approach to the Study

- *prioritize critical areas in the various position classifications that must be adjusted or revised first to avoid an impact of potential employee turnover or morale issues;*
- *prepare implementation strategy including time line and cost impact for all recommendations; and*
- *provide on-going support for three (3) years for placement of new jobs in the classification and compensation study.*

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

- focuses on market competitiveness;
- is based on the County's compensation philosophy;
- recognizes that compensation is comprised of more than just base pay levels;
- reflects changes in recent compensation strategies;
- designs custom solutions that take into account the diversity of needs present in the County and allows you to select the components and options that best meet your overall needs; and
- produces a structure that improves the County'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 County's project management team throughout the process to ensure constant communication of issues, concerns, and potential outcomes. We work closely with your staff to gain a solid understanding of your current operational realities, challenges, and desired outcomes. Moreover, Evergreen Solutions will work with you to balance your need to meet your performance goals while carefully managing the County's resources.

Compensation management has undergone significant transformation in the private sector and over time public sector organizations have mirrored these changes. While compensation once centered on the



separate administration of base pay and core benefits, a shift has occurred that has transformed compensation management. Progressive organizations now recognize that to effectively recruit, reward, motivate, and retain employees, compensation management requires strategic thinking and planning.

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

Evergreen Solutions realizes that the County will need to tailor its approach to fit the operating, fiscal, and competitive needs of the County. Recommendations must always reflect competitive needs while supporting the County's overall mission. Listed below is an overview of the approach Evergreen Solutions proposes to take to complete this critical project.

Kick Off Meeting

Evergreen Solutions 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 compensation and benefit data;
- identifying additional data needs; and
- developing preliminary schedules for subsequent tasks.

We will also request a copy of the employee database that reflects current compensation data.

Communication Plan

Communication is a critical component of any Compensation 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 desired. Additionally, the communication plan for the distribution of the end product, particularly how the results will be distributed to employees, is also critical.

Developing the Compensation Philosophy

An organization's compensation philosophy is designed to support the overall business strategy. It can take many forms, but ultimately the compensation philosophy selected will guide the structure of the overall compensation system. Evergreen Solutions will meet with the County's leadership team to ascertain County's overall business strategy and



	<p>document the various alternatives that are available to support that strategy. Based on the County's needs, Evergreen Solutions will provide the County with a comprehensive compensation philosophy to guide subsequent decisions. Typically, a consultant can facilitate the process and make recommendations for the compensation philosophy, but the decision will ultimately rest with the organization itself. It is imperative for the County to agree upon a compensation philosophy prior to establishing the remaining components of the compensation system.</p>
<p>Employee Orientation and Focus Groups</p>	<p>Based on client feedback and a review of best practices, we 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.</p>
	<p>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 Solutions consultants can also help to manage expectations since some employees may have unrealistic expectations based on anecdotal information.</p>
<p>Department Head Interviews</p>	<p>Evergreen Solutions staff conduct one-on-one interviews with department heads and senior officials (in addition to any other employees the County determines is necessary) to identify challenges for consideration. These interviews will allow our staff to add details to our understanding of the County 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 officials serve as invaluable resources in explaining how internal equity relationships have evolved over time and explaining the nuances between the differences in jobs.</p>
<p>Compensation</p>	<p>Our approach to compensation analysis is based on the belief that compensation should be organization-specific, fair, equitable, and directly tied to strategic goals. To ensure that all these criteria are met, we will conduct an extensive analysis on the relevant labor market, the internal structure and inter-relatedness of jobs within the County, and the relative worth of jobs within the County vis-à-vis the compensation philosophy.</p> <p>The most traditional component of a total compensation program is base pay (fixed pay). However, inclusion of benefits in total compensation strategy is not a new concept. Provision of benefits was originally a recruitment tool, though over time the provision of core benefits has become an expectation. Research shows that public sector organizations</p>



Market Survey	<p>commonly use superior benefits packages as a way to offset structural disadvantages in base pay. The purpose of the survey is to collect information for comparison to current offerings, and making recommendations for change consistent with the parameters of the compensation philosophy.</p>
	<p>A key component of assessing compensation is to consider market position, which is sometimes referred to as external equity or competitiveness. The market survey will obtain standard range information related to minimum, midpoint, and maximum salaries. As required in the RFP, data collection will focus on public and private sector employees in the surrounding area of Sumter County and at the national level for professional positions. Further, we will look to include any employers to whom the County has recently lost employees.</p>
	<p>In addition, a benefits survey will also be administered in tandem with the market survey. Special consideration can be given to select highly competitive, market-driven positions if necessary.</p>
Benchmarks	<p>One of the most important components of the external assessment is in the selection and utilization of benchmark positions for the labor market survey. We work with clients to identify the appropriate number of benchmark positions to best fit their needs in the labor market survey. Based on our experience, we have found that it is simply not practical to survey all positions within the County – the resulting surveys become too cumbersome for labor market peers to complete, and the response rate on the whole suffers. We ensure, through multiple checks and balances, that the benchmark positions chosen will represent a broad spectrum of positions across the organization, from all job families, pay levels, and functional areas.</p>
Targets	<p>To conduct an external labor market assessment, we work with the organization to identify the most appropriate targets to survey. Evergreen Solutions selects peer organizations based on the local labor competition, regional markets, and class-specific markets. Peer organizations should be those organizations that compete with the client for labor in at least one job family. Peers in the public sectors will be included in the survey, and if necessary, augmented with published secondary data sources.</p>
	<p>Typically, Evergreen Solutions waits until the outreach process has been completed to identify the complete list of market peers. This is because we often will uncover specific information during the focus group and interview sessions that identifies potentially critical survey targets. Ideally, we would like to work with the County after the outreach has been concluded to identify the final list of potential market peers.</p>
	<p>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</p>



and retain employees in specific positions. These factors have to be taken into account when selecting survey targets. Once the targets are selected and approved, the survey instrument is developed and sent to the client for final approval. Subsequent to client approval, the survey is then distributed to the targets in both paper and electronic formats.

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

Unifying the Solution

After determining 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 meet the County's needs.

The Evergreen Solutions 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 partner'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 County (i.e., Executive Director and the Governing Board) 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 Solutions consultants will proceed with the final solution which will include the Board's comments. The solution also contains information regarding fiscal impact and implementation.

Compensation Administration Guidelines

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

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

- how employees will move through the pay structure/system as a result of transfers, promotions, or demotions;
- how to pay employees whose base pay has reached the maximum of their pay range or value of their position;



**System
Maintenance**

- the proper mix of pay and benefits;
- how often to adjust pay scales and survey the market;
- timing of implementation; and
- how to keep the system fair and competitive over time.

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. Toward this end we will provide the Human Resources Department with all necessary tools and training to maintain the system over time.

**1.8
Detailed Work
Plan**

Listed on the following pages is the detailed work plan that Evergreen Solutions proposes to use to conduct a Comprehensive Compensation Study for Sumter County.

**Task 1.0
Project Kick Off**

TASK GOAL

To finalize the project plan with the County, gather all pertinent data, finalize any remaining contractual negotiations, and establish an agreeable final time line for all project milestones and deliverables.

TASK ACTIVITIES

1.1 Meet with the Client Project Manager (CPM). Objectives include:

- understand the County's mission and current compensation philosophy (if any);
- review our proposed methodology, approach, and project work plan to identify any necessary revisions;
- reach agreement on a schedule for the project including all assignments and project milestones/deliverables; and
- establish an agreeable communication schedule.

1.2 Identify potential challenges and opportunities for the study. Discuss the strategic direction of the County and some of the short and long-term priorities. This activity serves as the basis for assessing where the organization is going and what type of pay plan will reinforce current and future goals.



**Task 2.0
Collect and
Review Current
Environment Data**

- 1.3 Obtain relevant materials, including:
- any previous projects, research, evaluations, or other studies that may be relevant to this project;
 - organizational charts for the departments and divisions, along with related responsibility descriptions;
 - current position and classification descriptions, salary schedule(s), and classification system;
 - strategic business plans, budgets, and performance evaluation forms; 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.

KEY PROJECT MILESTONES

- Comprehensive project management plan
- Comprehensive database of the County's employees

TASK GOAL

To conduct statistical and anecdotal research into the current environment within the County and guide subsequent analytical tasks.

TASK ACTIVITIES

- 2.1 Schedule and conduct employee orientation sessions.
- 2.2 Meet with department heads and senior staff to obtain relevant information and statistical/anecdotal data on specific compensation issues and policies. Obtain insight into perceived current compensation system strengths and weaknesses.
- 2.3 Hold focus groups with a sample of employees to obtain additional relevant information and statistical/anecdotal data on specific compensation issues and policies.
- 2.4 Review any data provided by the County that may provide additional relevant insight.

KEY PROJECT MILESTONES

- Department head interviews



**Task 3.0
Develop
Compensation
Philosophy**

- Employee focus groups
- Employee orientation sessions

TASK GOAL

To facilitate the development of the County's compensation philosophy.

TASK ACTIVITIES

- 3.1 Conduct a thorough review of all background materials related to the County's compensation system.
- 3.2 Review information from senior management interviews.
- 3.3 Facilitate meeting of executive management team to review results of previous steps and present various options for compensation philosophy components.
- 3.4 Make recommendation for compensation philosophy based on input from previous steps.
- 3.5 Document accepted compensation philosophy.

KEY PROJECT MILESTONE

- Compensation philosophy

**Task 4.0
Identify List of
Market Survey
Benchmarks**

TASK GOAL

To reach an appropriate number and identify the proper benchmark positions for the external labor market assessment.

TASK ACTIVITIES

- 4.1 Conduct a thorough review of all materials to date, including employee database, classification listing, interviews, compensation review, and meetings with CPM and the Executive Director.
- 4.2 Identify, from the initial review, a list of classifications (benchmarks) to include in the labor market survey.
- 4.3 Submit the proposed list of positions to the CPM for review and approval.
- 4.4 Based on CPM review, make revisions to the benchmark list and finalize consistent with Evergreen Solutions analysis.



**Task 5.0
Identify Approved
List of Survey
Targets**

KEY PROJECT MILESTONES

- Preliminary list of benchmark classifications
- Final list of benchmark positions for the external labor market assessment

TASK GOAL

To identify and develop a comprehensive list of targets for conducting a successful external labor market assessment.

TASK ACTIVITIES

- 5.1 For each employee group, review with the CPM peer organizations that must be included in the survey.
- 5.2 Develop a preliminary list of organizations for the external labor market survey, placing a comparative emphasis on characteristics such as:
 - size of the organization;
 - geographic proximity to Bushnell area;
 - economic and budget characteristics; and
 - other demographic data.
- 5.3 Develop a list of survey targets by employee group. Develop a system for use of secondary data including potential sources and weighting of secondary data, if necessary.
- 5.4 Review survey methodology with CPM and refine survey methodology prior to distribution of survey.
- 5.5 After approval of survey methodology, develop contact list at peer organization and notify peers of impending survey.

KEY PROJECT MILESTONES

- Initial list of survey peers
- Survey methodology
- Final list of survey organizations and contacts



**Task 6.0
Conduct Market
Salary Survey and
Provide External
Assessment
Summary (In
Conjunction with
Task 7.0)**

TASK GOAL

To conduct the external labor market salary survey and provide a summary of the survey results to the County for review.

TASK ACTIVITIES

- 6.1 Prepare a customized external labor market survey for the County's approval.
- 6.2 Contact the targets for electronic completion of the survey. 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 survey results into Evergreen Solutions electronic data analysis tools.
- 6.5 Validate all data submitted.
- 6.6 Develop summary report of external labor market assessment results.
- 6.7 Submit summary report of external labor market assessment results to CPM.

KEY PROJECT MILESTONES

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

**Task 7.0
Conduct Market
Benefit Survey
(Concurrent with
Task 6.0)**

TASK GOAL

To conduct an external labor market benefits survey and provide a summary of the survey results to the County for review.

TASK ACTIVITIES

- 7.1 Develop a catalogue of County provided benefits.
- 7.2 Using the list of County provided benefits and major benefits offerings not provided by the County to develop a list of benefits to include in the external labor market survey.
- 7.3 Develop benefit survey to be included with salary survey developed in **Task 6.0**.
- 7.4 Submit benefit survey to CPM for review.



- 7.5 Revise benefit survey.
- 7.6 Distribute benefits survey in conjunction with salary survey.
- 7.7 Develop summary report of external labor market benefits results.
- 7.8 Submit summary report of external labor market benefits results to CPM.

KEY PROJECT MILESTONES

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

**Task 8.0
Develop Strategic
Positioning
Recommendations**

TASK GOAL

To assess the appropriateness of the County's current compensation philosophy and plan for all employees, providing issue areas and preliminary recommendations for strategic improvement.

TASK ACTIVITIES

- 8.1 Identify the compensation philosophy and accompanying thresholds.
- 8.2 Using the market data collected in Tasks 6.0 and 7.0, determine the proper pay plan including number of grades, steps, and ranges.
- 8.3 Identify highly competitive positions within the organization and customize recommendations for compensation where required.
- 8.4 Produce a pay plan(s) that best meets needs from an external equity standpoint.

KEY PROJECT MILESTONES

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



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

TASK GOAL

To develop and submit draft and final reports of the Comprehensive Compensation Study for the County.

TASK ACTIVITIES

- 9.1 Produce a comprehensive draft report that captures the results of each previous step. The comprehensive draft report will include the contents of all draft progress reports submitted up to this point.
- 9.2 Submit the comprehensive draft report to the CPM and any other members of the project team.
- 9.3 Make edits and submit copies of the final report.
- 9.4 Make a final presentation to the Client Project Manager, and the County Commission.
- 9.5 Provide recommendation for communicating study results to employees.

KEY PROJECT MILESTONES

- Draft and final reports
- Final presentation
- Communication plan

**Task 10.0
Develop
Recommendations
for Compensation
Administration**

TASK GOAL

To develop recommendations for continued administration by the County's staff to sustain the recommended compensation structure.

TASK ACTIVITIES

- 10.1 Develop recommendations and guidelines for continued administration and maintenance of the compensation structure, including recommendations and guidelines related to:
 - how employees will move through the pay structure/system as a result of transfers, promotions, or demotions;
 - how to pay employees whose base pay has reached the maximum of their pay range or value of their position;
 - the proper mix of pay and benefits;
 - how often to adjust pay scales and survey the market;



- timing of implementation; and
- how to keep the system fair and competitive over time.

- 10.2 Prioritize critical areas in the various position classifications that must be adjusted or revised first to avoid an impact of potential employee turnover or morale issues.
- 10.3 Develop recommendations related to compensation to employees who have reached the maximum of their appropriate pay range or the appropriate value of their position.
- 10.4 Present recommendations to the CPM for review.
- 10.5 Prepare implementation strategy for all recommendations.
- 10.6 Provide on-going support for three years for placement of new jobs in the classification and compensation study.

KEY PROJECT MILESTONE

- Recommendations for compensation administration

**1.9
Proposed
Time Line**

Evergreen Solutions possesses the staff, skills, and tools to complete the requested Comprehensive Compensation Study for Sumter County and deliver final recommendations in two months from project start date and following the signing of the contract. This time line is based on a tentative start date of May 15, 2010 with a completion date of July 15, 2010; however, it can be modified in any way to best suit the needs of Sumter County.

**1.10
Proposed Cost**

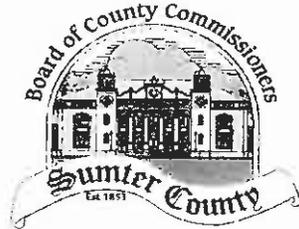
Evergreen Solutions, LLC is pleased to present our proposed costs to provide the requested Comprehensive Compensation Study for Sumter County. Evergreen Solutions is committed to providing the highest quality consulting services to our client partners for a reasonable price. Evergreen Solutions is fortunate that our overhead is minimal and our expenses are reasonable so we can pass that cost savings on to our clients.

Our total, not-to-exceed, fixed fee to complete the study is **\$14,000**. This total cost is all inclusive, and includes travel costs, fringe benefits, indirect cost (overhead), and all other out-of-pocket expenses. As required in the RFP, attached is the Proposal Form which requires our fee schedule to complete this study.

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



**PROPOSAL FORM FOR
BOARD OF SUMTER COUNTY COMMISSIONERS**



Name of Firm Submitting Qualifications Evergreen Solutions, LLC

Name of Person Submitting Qualifications Dr. Jeff Ling, Executive Vice-President

PROPOSER ACKNOWLEDGMENT

"The undersigned hereby declares that he/she has informed himself/herself fully in regard to all conditions to the work to be done, and that he/she has examined the RFP and Specifications for the work and comments hereto attached. The Vendor proposes and agrees, if this submission is accepted, to contract with the Board of Sumter County Commissioners, to furnish all necessary materials, equipment, labor and services necessary to complete the work covered by the RFP and Contract Documents for this Project. The Vendor agrees to accept in full compensation for each item the prices named in the schedules incorporated herein."

PROPOSER'S FEE SCHEDULE MUST BE ATTACHED TO THIS PROPOSAL FORM

Signature

04/22/10

Date

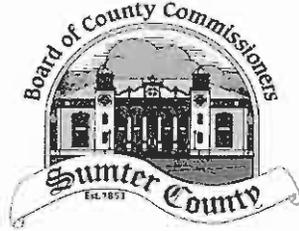
[] Check if exception(s) or deviation(s) to Specifications. Attach separate sheet(s) detailing reason and type for the exception or deviation.

This document must be completed and returned with your Submittal

*Appendix:
Required Forms*



**PROPOSAL FORM FOR
BOARD OF SUMTER COUNTY COMMISSIONERS**



Name of Firm Submitting Qualifications Evergreen Solutions, LLC

Name of Person Submitting Qualifications Dr. Jeff Ling, Executive Vice-President

PROPOSER ACKNOWLEDGMENT

"The undersigned hereby declares that he/she has informed himself/herself fully in regard to all conditions to the work to be done, and that he/she has examined the RFP and Specifications for the work and comments hereto attached. The Vendor proposes and agrees, if this submission is accepted, to contract with the Board of Sumter County Commissioners, to furnish all necessary materials, equipment, labor and services necessary to complete the work covered by the RFP and Contract Documents for this Project. The Vendor agrees to accept in full compensation for each item the prices named in the schedules incorporated herein."

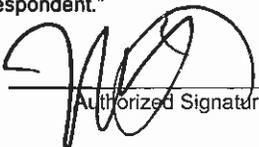
PROPOSER'S FEE SCHEDULE MUST BE ATTACHED TO THIS PROPOSAL FORM

Signature  _____
Date 04/22/10

[] Check if exception(s) or deviation(s) to Specifications. Attach separate sheet(s) detailing reason and type for the exception or deviation.

This document must be completed and returned with your Submittal

PROPOSER'S CERTIFICATION

Submit To: Sumter County Board of County Commissioners 910 North Main Street Bushnell, Florida, 33513 Phone 352-793-0200 Fax 352-793.0207	SUMTER COUNTY BOARD OF COUNTY COMMISSIONERS REQUEST FOR PROPOSAL (RFP) CERTIFICATION AND ADDENDA ACKNOWLEDGMENT			
DUE DATE: April 26, 2010	DUE TIME: 10:00 am	RFP # 153-0-2010/AT		
TITLE: RFP # 153-0-2010/AT SUMTER COUNTY COMPREHENSIVE COMPENSATION STUDY				
VENDOR NAME: Evergreen Solutions, LLC	PHONE NUMBER: (850) 383-0111			
VENDOR MAILING ADDRESS: 2852 Remington Green Circle, Suite 101	FAX NUMBER: (850) 383-1511			
CITY/STATE/ZIP: Tallahassee, Florida 32308	E-MAIL ADDRESS: jeff@consultevergreen.com			
<p>"I, the undersigned, certify that I have reviewed the addenda listed below (list all addenda received to date). I understand that timely commencement will be considered in award of this RFP and that cancellation of award will be considered if commencement time is not met, and that untimely commencement may be cause for termination of contract. I further certify that the services will meet or exceed the RFP requirements. I, the undersigned, declare that I have carefully examined the RFP, specifications, terms and conditions as applicable for this Request, and that I am thoroughly familiar with all provisions and the quality and type of coverage and services specified. I further declare that I have not divulged, discussed, or compared this RFP with any other Offeror and have not colluded with any Offerors or parties to an RFP whatsoever for any fraudulent purpose."</p>				
1 Addendum #	Addendum #	Addendum #	Addendum #	Addendum #
<p>"I certify that this quote is made without prior understanding, agreement, or connection with any corporation, firm, or person submitting an RFP for the same material, supplies, equipment or services and is in all respects fair and without collusion or fraud. I agree to abide by all conditions of this RFP and certify that I am authorized to sign this response and that the offer is in compliance with all requirements of the RFP, including but not limited to certification requirements. In conducting offers with an agency for Sumter County Board of County Commissioners (BOCC), respondent agrees that if this proposal is accepted, the respondent will convey, sell, assign, or transfer to the Sumter County BOCC all rights, title and interest in and to all causes of action it may now or hereafter acquire under the anti-trust laws of the United States for price fixing relating to the particular commodities or services purchased or acquired by the COUNTY. At the Sumter County BOCC discretion, such assignment shall be made and become effective at the time the purchasing agency renders final payment to the respondent."</p>				
_____ Dr. Jeff Ling, Executive Vice-President Authorized Agent Name, Title (Print)	 _____ Authorized Signature	_____ 04/22/10 Date		
<i>This form must be completed and returned with your Submittal</i>				

STATEMENT OF TERMS AND CONDITIONS

PUBLIC ENTITY CRIME: A person or affiliate who has been placed on the convicted vendor list following a conviction for a public entity crime may not submit a Proposal/Bid on a contract to provide any goods or services to a public entity, for the construction or repair of a public building or public work, may not submit Proposals/Bids on leases of real property to a public entity, may not be awarded or perform work as a contractor, supplier, subcontractor, or consultant under a contract with any public entity, and may not transact business with any public entity in excess of the threshold amount provided in Section 287.017, for CATEGORY TWO for a period of 36 months from the date of being placed on the convicted vendor list.
INDEMNIFICATION: The Contractor agrees to indemnify and hold harmless Board of Sumter County Commissioners, and their elected officials, employees and volunteers from and against all claims, losses and expenses, including legal costs, arising out of or resulting from, the performance of this contract, provided that any such claims, damage, loss of expenses is attributed to bodily injury, sickness, disease, personal injury or death, or to injury to or destruction of tangible property including the loss or loss of use resulting there from and is caused in whole or in part by any negligent act or omission of the tenant.
PROHIBITION OF LOBBYING: During the black out period which is, the period between the time the submittals for Invitation to Bid or the Request for Proposal, or Qualifications, or information, as applicable, are received at Contracts / Purchasing and the time the Board awards the contract, no proposer, no lobbyist, principal, or other person may lobby, on behalf of a competing party in a particular procurement matter, any member of the Board, or any Board employee other than the Budget & Purchasing Manager. Violation of this provision may result in disqualification of violating party. All questions regarding this Request for Proposal (RFP) or Invitation to Bid (IBID) must be submitted in writing to the Board's Budget & Purchasing Manager.
ANTI TRUST LAWS: By submission of a signed RFP or IBID, the successful Vendor acknowledges compliance with all antitrust laws of the United States and the State of Florida, in order to protect the public from restraint of trade, which illegally increases prices.
CONFLICT OF INTEREST: The award of the contract hereunder is subject to the provisions of Chapter 112 of the Florida Statutes. Vendors shall disclose the name of any Officer, Director, Partner, Associate, or Agent who is also an Officer, Appointee, or Employee of any of the Boards at the time of the RFP or IBID, or at the time of occurrence of the Conflict of Interest hereafter.
INTERPRETATION, CLARIFICATIONS AND ADDENDA: No oral interpretations will be made to any vendor as to the meaning of the RFP/IBID Contract Documents. Any inquiry or request for interpretation received by the Budget & Purchasing Manager before the date listed herein will be given consideration. All such changes or interpretations will be made in writing in the form of an addendum and, if issued, will be distributed at or after the Pre-Proposal/Pre-Bid Conference, mailed or sent by available or electronic means to all attending prospective Submitters prior to the established RFP/IBID opening date. Each Vendor shall acknowledge receipt of such addenda in the space provided. In case any Proposer/Bidder fails to acknowledge receipt of such addenda or addendum, his offer will nevertheless be construed as though it had been received and acknowledged and the submission of his bid will constitute acknowledgment of the receipt of same. All addenda are a part of the RFP/IBID FORMS and each Proposer/Bidder will be bound by such addenda, whether or not received by him. It is the responsibility of each Proposer/Bidder to verify that he has received all addenda issued before RFP's/IBID's are opened. In the case of unit price items, the quantities of work to be done and materials to be furnished under this RFP/IBID Contract are to be considered as approximate only and are to be used solely for the comparison of RFP's/IBID's received. The Board and/or his CONSULTANT do not expressly or by implication represent that the actual quantities involved will correspond exactly therewith; nor shall the Vendor plead misunderstanding or deception because of such estimate or quantities of work performed or material furnished in accordance with the Specifications and/or Drawings and other Proposal/Bid Documents, and it is understood that the quantities may be increased or diminished as provided herein without in any way invalidating any of the unit or lump sum prices bid.
GOVERNING LAWS AND REGULATIONS: The vendor is required to be familiar with and shall be responsible for complying with all federal, state and local laws, ordinances, rules and regulations that in any manner affect the work.
PROPRIETARY/CONFIDENTIAL INFORMATION: Vendors are hereby notified that all information submitted as part of, or in support of RFP's/IBID's, will be available for public inspection ten days after opening of the RFP's/IBID's or until a short list is recommended whichever comes first, in compliance with Chapter 119 and 287 of the Florida Statutes. Any person wishing to view the RFP's/IBID's must make an appointment by calling the Budget & Purchasing Manager at (352) 793-0200. All RFP's/IBID's submitted in response to this solicitation become the property of the Board. Unless information submitted is proprietary, copy written, trademarked, or patented, the Board reserves the right to utilize any or all information, ideas, conceptions, or portions of any RFP/IBID, in its best interest.
TAXES: The Board of Sumter County Commissioners is exempt from any taxes imposed by the State and/or Federal Government. Exemption certificates will be provided upon request.
NON-COLLUSION DECLARATION: By signing this RFP/IBID, all Vendors shall affirm that they shall not collude, conspire, connive or agree, directly or indirectly, with any other Proposer, firm, or person to submit a collusive or sham Proposal in connection with the work for which their RFP/IBID has been submitted; or to refrain from Bidding in connection with such work; or have in any manner, directly or indirectly, sought by person to fix the price or prices in the RFP/IBID or of any other Bidder, or to fix any overhead, profit, or cost elements of the RFP/IBID price or the RFP/IBID price of any other Bidder, or to secure through any collusion, conspiracy, connivance, or unlawful agreement any advantage against any other Bidder, or any person interested in the proposed work.
PROPOSER RESPONSIBILITY: Invitation by the Boards to vendors is based on the recipient's specific request and application to DemandStar by Onvia at www.DemandStar.com [(800) 711-1712] or as the result of response by the public to the legal advertisements required by State law. Firms or individuals submit their responses on a voluntary basis, and therefore are not entitled to compensation of any kind.
OWNERSHIP OF SUBMITTALS: All responses, inquiries or correspondence relating to or in reference to this RFP/IBID, and all other reports, charts, displays, schedules, exhibits and other documentation submitted by the vendors will become the property of the Board. Reference to literature submitted with a previous RFP/IBID will not relieve the Bidder from including any required documents with this RFP/IBID.
EXAMINATION OF BID DOCUMENTS: Each Bidder shall carefully examine the RFP/IBID Document to ensure all pages have been received, all drawings and/or Specifications and other applicable documents are included, and shall inform himself thoroughly regarding any and all conditions and requirements that may in any manner affect cost, progress or performance of the work to be performed under the Contract. Ignorance on the part of the CONTRACTOR will in no way relieve him of the obligations and responsibilities assumed under the Contract.
VENDOR RESPONSIBILITY: Vendors are fully and completely responsible for the labeling, identification and delivery of their submittals. The Budget & Purchasing Manager will not be responsible for any mislabeled or misdirected submissions, nor those handled by delivery persons, couriers, or the US Postal Service.
DRUG FREE WORKPLACE: All Proposers/Bidders shall submit the enclosed, duly signed and notarized form entitled "Drug Free Workplace Certificate". The Drug Free Workplace Vendor shall have the burden of demonstrating that his program complies with Section 287.087 of the Florida Statutes, and any other applicable state law.

BOARD OF SUMTER COUNTY COMMISSIONERS, are political subdivisions of the State of Florida, and reserve the right to reject any and/or all submittals, reserve the right to waive any informalities or irregularities in the examination process, and reserve the right to award contracts and/or in the best interest of the Boards. Submittals not meeting stated minimum terms and qualifications may be rejected by the Boards as non-responsive. The Boards reserve the right to reject any or all submittals without cause. The Boards reserves the right to reject the submission of any Vendor in arrears or in default upon any debt or contract to the Boards, or who has failed to perform faithfully any previous contract with the Boards or with other governmental agencies.
PUBLIC RECORDS LAW: Correspondence, materials and documents received pursuant to this RFP/IBID become public records subject to the provisions of Chapter 119, Florida Statutes.
VERIFICATION OF TIME: Nextel time is hereby established as the Official Time of the Boards.
PREPARATION OF PROPOSALS/IBIDS:
Signature of the Bidder: The Bidder must sign the RFP/IBID FORMS in the space provided for the signature. If the Proposer/Bidder is an individual, the words "doing business as _____" must appear beneath such signature. In the case of a partnership, the signature of at least one of the partners must follow the firm name and the words "Member of the Firm" should be written beneath such signature. If the Proposer/Bidder is a corporation, the title of the officer signing the RFP/IBID on behalf of the corporation must be stated and evidence of his authority to sign the RFP/IBID must be submitted. The Proposer/Bidder shall state in the RFP/IBID FORMS the name and address of each person interested therein.
Basis for Bidding: The price proposed for each item shall be on a lump sum or unit price basis according to specifications on the RFP/IBID FORM. The proposed prices shall remain unchanged for the duration of the Contract and no claims for cost escalation during the progress of the work will be considered, unless otherwise provided herein. Total Proposed Price/Total Contract Sum Proposed: If applicable, the total price bid for the work shall be the aggregate of the lump sum prices proposed and/or unit prices multiplied by the appropriate estimated quantities for the individual items and shall be stated in figures in the appropriate place on the RFP/IBID FORM. In the event that there is a discrepancy on the RFP/IBID FORM due to unit price extensions or additions, the corrected extensions and additions shall be used to determine the project bid amount.
TABULATION: Those wishing to receive an official tabulation of the results of the opening of this RFP/IBID are to submit a self-addressed, stamped business size (No. 10) envelope, prominently marked on the front lower left side, with the RFP identification. Tabulation requested by telephone, fax or electronic media will not be accepted.
OBLIGATION OF WINNING BIDDER: The contents of the RFP/IBID of the successful proposer/bidder will become contractual obligations if acquisition action ensues. Failure of the successful Proposer/Bidder to accept these obligations in a contract may result in cancellation of the award and such vendor may be removed from future participation.
AWARD OF BID: It is the Boards' intent to select a vendor within sixty (60) calendar days of the deadline for receipt of Proposals/Bids. However, Proposals/Bids must be firm and valid for award for at least ninety (90) calendar days after the deadline for receipt of the RFP/IBID.
ADDITIONAL REQUIREMENTS: The firms shall furnish such additional information as the Boards may reasonably require. This includes information which indicates financial resources as well as ability to provide the services. The Boards reserve the right to make investigations of the qualifications of the firm as it deems appropriate.
PREPARATION COSTS: The Boards shall not be obligated or be liable for any costs incurred by Proposers/Bidders prior to issuance of a contract. All costs to prepare and submit a response to this RFP/IBID shall be borne by the Proposer/Bidder.
TIMELINESS: All work will commence upon authorization from the Boards' representative (Budget & Purchasing Manager). All work will proceed in a timely manner without delays. The Contractor shall commence the work UPON RECEIPT OF NOTICE TO PROCEED and/or ORDER PLACED (PURCHASE ORDER PRESENTED), and shall deliver in accordance to the terms and conditions outlined and agreed upon herein.
DELIVERY: All prices shall be FOB Destination, Sumter County, Florida, inside delivery unless otherwise specified.
ADDITIONAL SERVICES/PURCHASES BY OTHER PUBLIC AGENCIES ("PIGGY-BACK"): The Vendor by submitting a Bid acknowledges that other Public Agencies may seek to "Piggy-Back" under the same terms and conditions, during the effective period of any resulting contract - services and/or purchases being offered in this Bid, for the same prices and/or terms proposed. Vendor has the option to agree or disagree to allow contract Piggy-Backs on a case-by-case basis. Before a Public Agency is allowed to Piggy-Back any contract, the Agency must first obtain the vendor's approval - without the vendor's approval, the seeking Agency cannot Piggy-Back.
PLANS, FORMS & SPECIFICATIONS: Bid Packages are available from the Budget & Purchasing Manager. These packages are available for pickup or by mail. If requested to mail, the Proposer/Bidder must supply a courier account number (UPS, FedEx, etc). Proposers/Bidders are required to use the official RFP/IBID FORMS, and all attachments itemized herein, are to be submitted as a single document. Any variation from the minimum specifications must be clearly stated on the RFP/IBID FORM and/or Exceptions/Deviations Sheet(s). Only one set of plans, forms, and specifications will be furnished each company or corporation interested in submitting a proposal/bid. RFP/IBID FORM documents for this project are free of charge and are available on-line and are downloadable (vendor must pay any DemandStar fees or any shipping).
MANUFACTURER'S NAME AND APPROVED EQUIVALENTS: Any manufacturer's names, trade names, brand names, information and/or catalog numbers listed in a specification are for information and not intended to limit competition unless otherwise indicated. The Proposer/Bidder may offer any brand for which he is an authorized representative, which meets or exceeds the RFP/IBID specification for any item(s). If RFP's/IBID's are based on equivalent products, indicate on the RFP/IBID FORM the manufacturer's product name and literature, and/or complete specifications. Reference to literature submitted with a previous RFP/IBID will not satisfy this provision. The Proposer/Bidder shall explain in detail the reason(s) why the proposed equivalent will meet the specifications and not be considered an exception thereto. RFP's/IBID's which do not comply with these requirements are subject to rejection. RFP's/IBID's lacking any written indication of intent to quote an alternate brand will be received and considered in complete compliance with the specifications as listed on the RFP/IBID FORM. The Budget & Purchasing Manager is to be notified, in writing, of any proposed changes in materials used, manufacturing process, or construction. However, changes shall not be binding upon the Boards unless evidenced by a Change Notice issued and signed by the Budget & Purchasing Manager, or designated representative.
QUANTITIES: The quantities as specified in this RFP/IBID are estimates only and are not to be construed as guaranteed minimums.
SAMPLES: Samples of items, when called for, shall be furnished free of expense, and if not destroyed may, upon request, be returned at the Proposer's/Bidder's expense. Each sample shall be labeled with the Proposer's/Bidder's name, manufacturer brand name and number, RFP/IBID number and item reference. Samples of successful Proposer's/Bidder's items may remain on file for the term of the contract. Request for return of samples shall be accompanied by instructions which include shipping authorization and must be received at time of opening. Samples not returned may be disposed of by the Boards within a reasonable time as deemed appropriate.
DOCUMENT RE-CREATION: Vendor may choose to re-create any document(s) required for this solicitation, but must do so at his own risk. All required information in the original Board format must be included in any re-created document. Submittals may be deemed non-responsive if required information is not included in any re-created document.
ACKNOWLEDGED:

Signature and Date

This document must be completed and returned with your Submittal

REFERENCE & SIMILAR PROJECTS EXPERIENCE FORM

Owner / Business Name: City of Bushnell		
Project Location / Address: 219 N. Market Street		
City: Bushnell	State: Florida	Zip Code: 33513
Point of Contact: Ms. Kelly Marcoux, Director of Human Resources	Dates of Work: 05/06 to 05/07	
Phone Number: (352) 793-2591	Fax Number: (352) 793-2711	
E-mail Address: KMarcoux@cityofbushnellfl.com		
Project Name: Total Compensation Study for all City employees		
Brief Description of Project: Evergreen was hired by the City of Bushnell to assist with a city-wide Compensation Study and make recommendations for the implementation of a revised pay plan for all employees and classifications in the City. As part of the study, Evergreen conducted focus groups and interviews with all employees, and all employees completed Job Assessment Tools (JATs). Evergreen Solutions consultants conducted a comprehensive salary survey of local and regional employers to assess the market competitiveness of the City. Finally, a detailed plan was developed to provide the City with specific steps to implement an equitable and competitive compensation plan.		

Owner / Business Name: Manatee County, Florida		
Project Location / Address: 1112 Manatee Avenue West		
City: Bradenton	State: Florida	Zip Code: 34205
Point of Contact: Ms. Karen Windon, Deputy County Administrator	Dates of Work: 11/07 to 04/09	
Phone Number: (941) 745-3799	Fax Number:	
E-mail Address: Karen.Windon@mymanatee.org		
Project Name: Compensation, Classification and Performance Management Study		
Brief Description of Project: Evergreen was hired by Manatee County to assist with a county-wide Compensation and Classification Study for 16 departments, with approximately 2,900 employees within approximately 600 classifications and 58 pay ranges/grades. As part of the review, orientation sessions, focus groups, and interviews were conducted in throughout the county. All employees were asked to complete the Job Assessment Tool (JAT) and job analysis was conducted with the results in order to create a classification plan. A salary survey was issued to local and regional employers to assess competitiveness. Based on the classification and compensation findings, a new pay plan as well as policies and procedures were recommended to the County.		

Owner / Business Name: City of Ocala, Florida		
Project Location / Address: 151 SE Osceola Avenue		
City: Ocala	State: Florida	Zip Code: 34471
Point of Contact: Ms. Sandra Wilson, Director of Human Resources	Dates of Work: 10/06 to 10/07	
Phone Number: (352) 401-6942	Fax Number:	
E-mail Address: swilson@ocalafl.org		
Project Name: Compensation and Classification Study		
Brief Description of Project: The Evergreen Solutions Team was hired by the City of Ocala, Florida to assist with a city-wide Compensation and Classification Study and recommendations for implementation of a revised pay plan. The study included all employees and classifications in the City.		

This document must be completed and returned with your Submittal

Sumter County Comprehensive Compensation Study RFP 153-0-2010/AT

CONTRACTOR'S AFFIDAVIT

State of Florida
County of Leon

Before me personally appeared Jeff Ling who is (title) Executive Vice-President of (the company described herein) Evergreen Solutions being duly sworn, deposes and say that the foregoing statements are a true and accurate statement of the position of said organization as of the date thereof, and, that the statements and answers to the foregoing experience questionnaire are correct and true as of the date of this affidavit; and, that he/she understands that intentional inclusion of false, deceptive, or fraudulent statements of this application constitutes fraud; and, agrees to furnish any pertinent information requested by The Sumter County Board of County Commissioner deemed necessary to verify the statements made in this application or regarding the ability, standing and general reputation of the applicant.

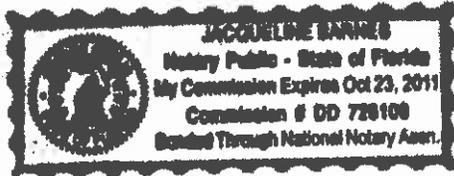
Personally Known X or Produced Identification _____

Sworn to and subscribed before me this 22 day of April, 2010

Jacqueline Barnes
NOTARY PUBLIC - STATE OF FLORIDA
(Signature of Notary Public)

Jacqueline Barnes
(Print Name of Notary Public)

(seal)



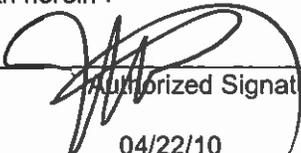
This document must be completed and returned with your Submittal

DRUG FREE WORKPLACE CERTIFICATE

I, the undersigned, in accordance with Florida Statute 287.087, hereby certify that,

Evergreen Solutions
(print or type name of firm)

- ✓ Publishes a written statement notifying that the unlawful manufacture, distribution, dispensing, possession or use of a controlled substance is prohibited in the workplace named above, and specifying actions that will be taken against violations of such prohibition.
- ✓ Informs employees about the dangers of drug abuse in the work place, the firm's policy of maintaining a drug free working environment, and available drug counseling, rehabilitation, and employee assistance programs, and the penalties that may be imposed upon employees for drug use violations.
 - Gives each employee engaged in providing commodities or contractual services that are under proposal or bid, a copy of the statement specified above.
 - Notifies the employees that as a condition of working on the commodities or contractual services that are under proposal or bid, the employee will abide by the terms of the statement and will notify the employer of any conviction of, please or guilty or nolo contendere to, any violation of Chapter 1893, or of any controlled substance law of the State of Florida or the United States, for a violation occurring in the work place, no later than five (5) days after such conviction, and requires employees to sign copies of such written (*) statement to acknowledge their receipt.
 - Imposes a sanction on, or requires the satisfactory participation in, a drug abuse assistance or rehabilitation program, if such is available in the employee's community, by any employee who is so convicted.
- ✓ Makes a good faith effort to continue to maintain a drug free work place through the implementation of the drug free workplace program.
- ✓ "As a person authorized to sign this statement, I certify that the above named business, firm or corporation complies fully with the requirements set forth herein".



 Authorized Signature
 04/22/10

 Date Signed

State of: Florida

County of: Leon

Sworn to and subscribed before me this 22 day of April, 2010

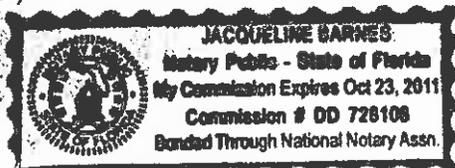
Personally known X or Produced Identification _____
(Specify Type of Identification)

Jacqueline Barnes

 Signature of Notary

My Commission Expires 10/23/2011

(seal)



This document must be completed and returned with your Submittal
DISCLOSURE OF SUBCONTRACTORS, SUBCONSULTANTS AND SUPPLIERS

SUBCONTRACTOR LICENSE INFORMATION MUST BE SUBMITTED WITH THE RFP, IN ORDER FOR SUMTER COUNTY TO VERIFY THAT THE SUBCONTRACTOR ARE IN FACT LICENSE PERFORM THEIR TRADE SCOPE OF WORK.

Name of Firm Submitting Proposal:

Evergreen Solutions

(Print or Type)

Name of Person Submitting Proposal:

Dr. Jeff Ling, Executive Vice-President

(Print or Type)

Please list all Subcontractors, or Material \ Equipment Suppliers to be used in connection with performance of this contract. Attach additional sheets as necessary.

Name of Firm or Agency: n/a

Address:

Telephone:

Contractor's License number

Contact Name / Title:

Name of Firm or Agency: n/a

Address:

Telephone:

Contractor's License number

Contact Name / Title:

Name of Firm or Agency: n/a

Address:

Telephone:

Contractor's License number

Contact Name / Title:

Name of Firm or Agency: n/a

Address:

Telephone:

Contractor's License number

Contact Name / Title:

This document must be completed and returned with your Submittal

ACORD CERTIFICATE OF LIABILITY INSURANCE

OP ID CS
EVERG-5

DATE (MM/DD/YYYY)
04/21/10

PRODUCER
Rogers, Gunter, Vaughn
Insurance, Inc.
1117 Thomasville Rd.
Tallahassee FL 32303
Phone: 850-386-1111 Fax: 850-385-9827

INSURED

Evergreen Solutions LLC
Dr Linda Recio
2852 Remington Green Cir #101
Tallahassee FL 32308

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW.

INSURERS AFFORDING COVERAGE

NAIC #

INSURER A.	Zurich US	19305
INSURER B.	Assurance Company of America	
INSURER C.	The Hartford	
INSURER D.		
INSURER E.		

COVERAGES

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

INSR ADD'L LTR INSRD	TYPE OF INSURANCE	POLICY NUMBER	POLICY EFFECTIVE DATE (MM/DD/YY)	POLICY EXPIRATION DATE (MM/DD/YY)	LIMITS
B	<input type="checkbox"/> GENERAL LIABILITY <input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS MADE <input checked="" type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC	PAS02559336	08/17/09	08/17/10	EACH OCCURRENCE \$ 1000000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 1000000 MED EXP (Any one person) \$ 10000 PERSONAL & ADV INJURY \$ excl GENERAL AGGREGATE \$ 2000000 PRODUCTS - COMP/OP AGG \$ 2000000
B	<input type="checkbox"/> AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input type="checkbox"/> ALL OWNED AUTOS <input type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> HIRED AUTOS <input checked="" type="checkbox"/> NON-OWNED AUTOS	PAS02559336	08/17/09	08/17/10	COMBINED SINGLE LIMIT (Ea accident) \$ 1000000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$
	<input type="checkbox"/> GARAGE LIABILITY <input type="checkbox"/> ANY AUTO				AUTO ONLY - EA ACCIDENT \$ OTHER THAN EA ACC \$ AUTO ONLY AGG \$
B	<input checked="" type="checkbox"/> EXCESS/UMBRELLA LIABILITY <input type="checkbox"/> OCCUR <input type="checkbox"/> CLAIMS MADE <input type="checkbox"/> DEDUCTIBLE <input checked="" type="checkbox"/> RETENTION \$10000	PAS02559336	08/17/09	08/17/10	EACH OCCURRENCE \$ 1000000 AGGREGATE \$ 1000000 \$ \$
A	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? If yes, describe under SPECIAL PROVISIONS below	00267520702	10/24/09	10/24/10	<input checked="" type="checkbox"/> WC STATU-TORY LIMITS <input type="checkbox"/> OTH-ER E.L. EACH ACCIDENT \$ 500000 E.L. DISEASE - EA EMPLOYEE \$ 500000 E.L. DISEASE - POLICY LIMIT \$ 500000
C	<input type="checkbox"/> OTHER <input type="checkbox"/> E/O	OOPG0258846	08/17/09	08/17/10	1000000 DED 10000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES / EXCLUSIONS ADDED BY ENDORSEMENT / SPECIAL PROVISIONS

CERTIFICATE HOLDER

CANCELLATION

SUMTBU1
Sumter County Board of County Commissioners; Risk Management Department
910 N. Main Street, Suite 217
Bushnell FL 33513

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, THE ISSUING INSURER WILL ENDEAVOR TO MAIL 10 DAYS WRITTEN NOTICE TO THE CERTIFICATE HOLDER NAMED TO THE LEFT, BUT FAILURE TO DO SO SHALL IMPOSE NO OBLIGATION OR LIABILITY OF ANY KIND UPON THE INSURER, ITS AGENTS OR REPRESENTATIVES.

AUTHORIZED REPRESENTATIVE

Christa L. Billington

CONTRACT

THIS AGREEMENT is made this 11th day of May, 2010, by and between **Board of Sumter County Commissioners** (hereafter referred to as "Board"), whose address is 910 North Main Street, Bushnell, Florida 33513, and Evergreen Solutions, LLC (hereafter referred to as "Consultant"), whose address is 2852 Remington Green Circle, Suite 101, Tallahassee, FL 32308.

RECITALS

WHEREAS, the Board has need for SUMTER COUNTY COMPREHENSIVE COMPENSATION STUDY; and

WHEREAS, the Comprehensive Compensation Study provides professional services; and

WHEREAS, the parties desire to enter into a written agreement outlining the duties and responsibilities and compensation of the Strategic Plan based on the Consultant's response to RFP # 153-0-2010/AT – SUMTER COUNTY COMPREHENSIVE COMPENSATION STUDY;

NOW, THEREFORE, in consideration of the mutual covenants and agreements contained herein, it is agreed as follows:

1. The relationship of the Consultant to the Board will be that of a professional consultant and the Consultant will provide the professional and technical services required under this agreement in accordance with acceptable professional practices and ethical standards applicable to Consultant's profession, and will endeavor to provide to the Board prompt and efficient consulting services to the best of its ability.
2. Consultant is hereby retained and employed as the SUMTER COUNTY COMPREHENSIVE STUDY consultant to work with the Board to provide said Server Hosting services in accordance with the scope of work outlined in RFP # 153 -0-2010/AT.
3. Consultant agrees to prepare and complete the deliverables to the Board. Consultant may be asked to present the deliverables in person for review by staff or for discussion at a scheduled Board meeting.
4. The term of this Agreement shall commence on the day and year as shown above and continue in force through 5/11/2013. This Agreement may be renewed on an annual basis if agreed to in writing by both parties. The term of this Agreement does not relieve the Consultant of any future responsibility as described in paragraph eight (8) of this Agreement.
5. This Agreement may be terminated by either party upon thirty (30) days prior written notice. If this agreement is terminated, Consultant shall be paid for all work performed up to the date of termination.

6. With regard to compensation paid to Consultant, Consultant shall furnish to the Board on a monthly basis an itemized invoice of the hours, services, products and other services utilized during the preceding month. Invoice shall be itemized per the attached Fee Schedule (Exhibit "A"). Consultant shall compute the total amount due for the preceding month and all amounts due Consultant shall be paid on a monthly basis pursuant to the provisions of the Local Government Prompt Payment Act, F.S. 218. Consultant acknowledges that and agrees that the rates set forth in the Fee Schedule shall remain fixed throughout the duration of the Agreement and thereafter shall only be adjusted by mutual written agreement of both parties.

7. General Considerations.

- a. All reports, drawings, designs, specifications, notebooks, computations, details, calculations documents prepared by Consultant and presented to the Board pursuant to this Agreement are and remain the property of the Board as instruments of service.
- b. All analyses, data, documents, models, modeling, reports and tests performed or utilized by Consultant shall be made available to the Board upon request and shall be considered public records.
- c. Consultant shall keep all books, records, files, drawings, plans and other documentation, including all electronically stored items, which concern or relate to the services required hereunder, for a minimum of three (3) years from the date of expiration or termination of this Agreement, or as otherwise required by any applicable law, whichever date is later. The Board shall have the right to order, inspect and copy all such Records as often as it deems necessary during any such period of time. This right to audit, inspect and copy records shall include all of the records of the Subconsultants (if any).
- d. Consultant shall, at all times, comply with the Florida Public Records Law, the Florida Open Meeting Law and all other applicable laws, rules and regulations of the State of Florida.
- e. Consultant shall, at all times, carry Professional Liability, General Liability, Automobile and Worker's Compensation Insurance pursuant to the insurance requirements in RFP # 153-0-2010/AT.
- f. Upon Consultant's written request, the Board will furnish, or cause to be furnished, such reports, studies, instruments, documents, and other information as Consultant and Board mutually deem necessary, and Consultant may rely upon same in performing the services required under this agreement.
- g. The Board and Consultant each binds itself and its successors, legal representatives and assigns to the other party to this agreement and to the partners, successors, legal representatives and assigns of such other party to this agreement, in respect to all covenants of this agreement; and neither the Board nor Consultant shall assign or transfer their interest in this agreement without the prior written consent of the other party.

8. Should any other professional services be called for by the Board, the charges shall be agreed upon in advance by the parties hereto. The Consultant may be required to provide additional services to the Board on challenges, public protests, administrative hearings or similar matters. The consultant shall be available to represent the Board, serve as an expert witness and provide supporting documentation as necessary.

9. The Contract Documents, which comprise the entire Contract between Board and Consultant and which are made part hereof by this reference, consist of the following:

- a. Request for Proposal (RFP)
- b. Instructions, Terms, and Conditions
- c. RFP Forms
- d. Vendor's Certification
- e. General Terms and Conditions
- f. Drug Free Workplace Certificate
- g. References
- h. Scope of Work / Specifications
- i. Agreement for Services
- j. Permits / Licenses
- k. All Proposal Addenda Issued Prior to RFP Opening Date
- l. All Modifications and Change Orders Issued
- m. Notice of Award / Notice to Proceed

10. Consultant does hereby specifically promise and agree to "hold harmless", defend and indemnify the Board and the agents, servants, employees, officers, and officials thereof from and against any and all liability or responsibility for damage to property or person that may arise in connection with the services to be provided hereunder, including reasonable attorney fees and expenses.

11. Consultant, its agents, servants or employees shall, in no manner, whatsoever be construed as the employees, agents, servants or representatives of the Board and shall have not expressed or implied power or authority to act in any manner whatsoever for or on behalf of the Board, except as provided in the scope of services called for herein. Consultant is hereby designated as an independent contractor to the Board and none of the employees, agents or servants of the Consultant shall have any of the fringe benefits applicable to employees of the Board.

12. In the event of default by either party hereto, the defaulting party shall be liable for all costs and expenses, including reasonable attorney's fees, incurred by the other party and enforcing it rights hereunder, whether litigation be instituted or not, and at the trial court and appellate court level.

13. Consultant does hereby waive "venue privilege" and or "diversity of citizenship privileges" and agrees specifically that any action for the enforcement, construction or interpretation of this agreement shall be maintained in the County or Circuit Court for Sumter County, Florida and Consultant hereby specifically waives its right to institute any action of any kind or nature whatsoever against the Board in any other State or Federal Court or administrative tribunal.

14. This Agreement represents the entire and integrated agreement between the parties and supersedes all prior negotiations, representations or agreements, either written or verbal. If any provision of the Agreement is declared invalid or unenforceable, the remainder shall continue in full force and effect.

15. This Agreement cannot be changed or modified, unless by written agreement signed by all parties hereto.

16. In performing services hereunder, Consultant shall comply with all federal, state and local laws and regulations. Consultant shall be responsible for identifying and obtaining all permits necessary to complete the scope of services. Consultant shall be responsible for obtaining, at its sole cost and expense, all necessary licenses and other governmental approvals required in order for Consultant to provide the type of services required hereunder.

17. Consultant shall notify Board in writing of any commitments during the term of this Agreement which may constitute a potential or actual conflict of interest with respect to the scope of services to be performed for the Board.

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

ATTEST:
COMMISSIONERS

SUMTER COUNTY
BOARD OF COUNTY

By: _____

By: Doug Gilpin, Chairman

Date Signed:

ATTEST:
Consultant

By: _____

By:

Date Signed:

ATTEST: