



Educational Management Solutions

Helping
Schools Navigate the
Ever Changing
World of Human
Resources



Proposal

Job Classification and Compensation Study

Job Description, Legal, Compliance and Strategic Compensation Design
For



EMS California Office
P.O. Box 1290 – Murphys, CA 95247
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Your partner in building effective HR Solutions

Company Introduction & Qualifications

Educational Management Solutions

A recognized leader in consulting, training, and software solutions specifically targeted to meet the Human Resource needs of school systems across the Nation. Exclusively working with public school systems since 1997, EMS clients have included hundreds of school systems throughout the United States. EMS has an unmatched breadth of expertise gained from previous work in both the private and public sectors. Further, we have combined this experience in personnel management, compensation planning, employment regulations, and workers compensation with leading edge computer technology to provide school systems solutions in the development, analysis, management, and uses of job information.

Name: Educational Management Solutions
Structure: Limited Liability Company (LLC)
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Date Established: 1992
Submitted By: T.R. Lin and Fred Corn

**Accurate, defensible
and understandable
job information &
compensation
structures provide the
basis for virtually all
Human Resource
decisions.**



Company Background and History

Educational Management Solutions (EMS) is recognized as a leader in providing consulting, training, and software solutions specifically targeted to meet the Human Resource needs of educational systems across the Nation. Exclusively working with educational systems since 1997, EMS clients have included educational systems throughout the United States. EMS has an unmatched breadth of expertise gained from previous work in both the private and public sectors. The staff of EMS have practical day-to-day experience in the management of school human resource departments and understands the needs of educational systems. Further, EMS has combined this experience in personnel management, compensation planning, employment regulations, and workers compensation with leading edge computer technology to provide educational systems solutions in the development, analysis, management, and uses of job information.

EMS's national presence includes locations in Alabama, California, Wyoming, Kansas, Missouri, New Mexico, Connecticut, and Maryland.

Educational System Experience

For over two decades, Educational Management Solutions has successfully provided job classification and compensation study services to hundreds of school systems across the nation. This experience has provided us a great deal of experience and expertise in working with school boards, employee organizations (union and non-union) and Agency administrators. In addition to numerous school systems across the United States, we are proud to list several Personnel Commission and County Office of Education Districts as clients. Our School system roots, HR expertise and national experience enable us to provide the most effective classification / compensation solution for the Agency. Further, our experience in California gives our staff an understanding of California districts and structures.

Education Based HR Expertise

The significant amount of school based human resource knowledge, experience and expertise allows EMS staff to provide a wide range of effective, efficient and legally compliant human resource solutions and realistic implementation strategies. EMS staff members have decades of experience in educational system human resource administrative roles. This experience provides EMS with an outstanding understanding of the unique culture and needs of educational systems.

Building Partnerships to Find Solutions

EMS strongly believes in a partnering approach that allows us to truly understand the specific needs of your Agency. Further, our in-depth collaboration with Agency staff allows us to more effectively and efficiently solve problems and create realistic implementation strategies that meet the specific needs of the Agency. From our client-centered planning sessions and communication processes to our comprehensive on and off-site research, needs assessment, training and client support teams, EMS can provide a level of comprehensive assistance that truly is unmatched.

Educational / Client References

Following is a reference list of several of educational systems that have had classification studies performed by Educational Management Solutions within the past year.

San Ramon Valley Unified School District

Contact: Keith Rogenski (925) 552-5500

Email: krogenski@srvusd.net

Assistant Superintendent of Human Resources

699 Old Orchard Drive, Danville, CA 94526

Lynwood Unified School District

Contact: Gickee Ormeo (310) 886-1600

Email: gormeo@mylUSD.org

Director, Classified Personnel

11321 Bullis Road, Lynwood, CA 90262

Saugus Union Elementary School District

Contact: Jennifer Stevenson (661) 294-5300

Email: jstevenson@saugusUSD.org

Assistant Superintendent of Human Resources

24930 Avenue Stanford, Santa Clarita, CA 91355

Santa Cruz County Office of Education

Contact: Troy Cope (831) 466-5751

Email: tcope@santacruzcoe.org

Human Resources Senior Director

400 Encinal Street, Santa Cruz, CA 95060

Alameda Unified School District

Contact: Humera Kalil (510) 337-7000

Email: hkhalil@alamedaunified.org

Director of Classified Personnel

2060 Challenger Dr, Alameda, CA 94501

Project Leadership Team

Fred Corn (Project Team Management / Report Analysis) Fred has 16 years of experience in human resource management with specialization in employee benefits and compensation. Mr. Corn, in addition to his background in school district operations also has a degree in Computer Science and significant experience in programming and application of computer technologies for human resource operations. Mr. Corn is based out of the Central Regional Office in Kansas.

Olivia Elizondo Zepeda (Job Analysis) received her BA and M.Ed. in Bilingual and Multicultural Education from Northern Arizona University. Mrs. Zepeda served as Associate Superintendent for 17 years and had previously served the district as director of curriculum and staff development, director of federal projects, principal and teacher at the elementary and middle school. Mrs. Zepeda has taught graduate and undergraduate classes at the university level and is fully bilingual in English and Spanish. Olivia is based in Yuma, Arizona.

T.R. Lin (Project Management/Job Analysis) Dr. Lin has over 32 years of professional public HR experience in California merit school districts. T.R. started his career as a Personnel Examiner and became the Assistant Personnel Director, Selection with the Personnel Commission of Los Angeles USD; moved on as the Personnel Director and Assistant Superintendent, HR of Bassett USD in Los Angeles County; then served as the HR Director of Desert Sands USD in Riverside County; and retired as the Director, Classified Personnel for La Mesa-Spring Valley SD in San Diego County. Dr Lin is based out of our Southern California Office

Potential Project Staff

Depending on the timing and specific needs of this project, the following staff members may be available to perform on-site and/or support services for this project.

Kelly Eastes (Job Analysis) has a Master's of Public Administration from the University of Wyoming and a Bachelor's in Recreation and Parks from Texas A&M University. Kelly's career experiences include 17 years in school Human Resources. He also served as Parks Manager for Natrona County Parks in central Wyoming for 14 years. He currently resides in Casper, Wyoming.

Ann Knowles (Job Analysis) Ann received her BS and MS degrees from Kansas State University and University of Arizona. Ms. Knowles has taught and coached at three Tuscan, Arizona High Schools in Debate, Public Speaking, Literature and Writing. She also served on many salary scale study and academic recommendation committees during her time in Arizona. Ms. Knowles coordinated Human Resources over four campuses in the post-secondary general education areas. Ann works out of Salina, KS.

Betty Gray (Project Management/Data Analysis) Betty directs the Company's Project Operations. Ms. Gray has over 20 years experience in supervision, labor relations and employee training. Ms. Gray has extensive expertise in analyzing jobs for use in the development of pre-placement medical exams, compensation evaluations and personnel compliance. Ms. Gray will provide overall coordination of the project's team. Ms. Gray is based out of the Western Region Office in Oakland, California.

Cheryl M. Haines (Job Analysis) Cheryl is a retired business executive, having spent 25+ years in Director and Vice President level roles at tech companies in Silicon Valley. After retirement, Ms. Haines co-founded Silicon Valley Youth Bridge, a non-profit organization offering after school bridge lessons and clubs to 4th through 8th graders. Cheryl has also worked as a marketing consultant for a variety of organizations including Great Place to Work, Inc., Sumologic, and Symantec. Cheryl is based out of the Western Region Office in Oakland, California.

Larry Hunn (Data Analysis/Report Development) Larry has extensive experience in personnel management and workers compensation administration in both the public and private sectors. As a former educator and counselor, Mr. Hunn developed innovative approaches to assist students with special needs in transitioning from school to the workplace. Mr. Hunn is the founder of EMS and is based out of the Central Office in Murphys, California.

Dr. Brian W. Schrader (Project Planning) Brian has a Ph.D. in Industrial / Organizational Psychology and bachelor's degrees in both Psychology and Chemistry. After serving as a University Professor for over 25 years specializing in Personnel Psychology, Statistics, and Social Psychology, Brian joined EMS as their National Project Director where he oversees all of their projects and studies across the U.S. He brings his expertise in Employment Law, Research Methodology, Statistical Analysis, and Work Psychology to all aspects of our consulting team. Dr. Schrader is stationed out of the Midwest/Central Office in Salina, KS.

Scope of Work

Benefits of the EMS Approach

During the course of this Study EMS will provide the combination of training and consultation needed to maximize the benefits that can be gained by the District.

- **Nationally Recognized Leader in Educational System Human Resources Consulting:** Working with a consultant that is nationally known for successfully serving only educational systems throughout the United States ensures that the project will be done effectively and accurately.
- **Legally Compliant Function Based Job Descriptions:** A Study based upon the most current, legally compliant, and defensible data collection and function-based job description design processes provides the level of defensibility, legal compliance (ADA, FLSA, EEOC, etc.), and usability your school system requires.
- **Highest Level of Employee and Supervisor Buy-In:** Our unique “stakeholder committee”, “focus group” and “supervisor validation” processes ensure the participation of all employees and supervisors that may be impacted by the Study’s recommendations and ensures buy-in of all parties to the study’s process and successful implementation.
- **School Validated Point-Factor Based Internal Wage Equity:** Our proprietary Multi Point-Factor analysis process has been created and validated with assistance from client school systems. This process ensures an analysis with the high level of internal integrity across all job classifications that is critical for understanding the relationships between jobs and the development of compensation structure recommendations.
- **Customized Local Market Study Results:** EMS provides customized market research processes that are based specifically on local (school and non-school) competitors which provides an accurate and up-to-date market salary analysis. This ensures that any final wage adjustment recommendations are based on competitiveness with the local market.
- **Competency Based Prerequisite Job Factors:** Documentation of the Knowledge, Skill, Ability, Responsibility, and Working Conditions based competencies that are required to for employees to effectively perform the functions of each job classification assists in accurate hiring and addresses fair pay and prerequisite job factors.
- **Strategic Compensation Structure Planning:** Evaluation of current compensation structures and assistance in the development of *strategic* and *sustainable* compensation structures for all staff classifications is necessary to fully meet the needs, budget conditions, and strategic direction of the school system. Further the development of implementation plans that provide direction in a timely and employee friendly manner will be completed.
- **HR Staff and Hiring Supervisor Training:** Throughout the study “stakeholder committee” members, hiring supervisors, and Human Resource staff will receive training on the processes used in the Study, the necessary legal requirements (ADA, FLSA, EEOC, etc.), and will learn how to put completed job information to use in multiple ways.

- **Most Widely Used Job Description Software:** Our proprietary *JobsPlus*™ software (the exact same software EMS analysts utilize during the Study) will be licensed for use by District HR representatives. This software is the most widely used job description software by school systems in the United States and will allow your Human Resource staff to efficiently maintain job information and provide consistency in Human Resource decision-making for a wide variety of human resource functions.
- **Maximizing the Ongoing Usefulness of Data:** Our goal is to provide all of the information, tools and training necessary for your Human Resource staff to be able to maintain a uniform process for employee related decisions throughout District operations. While EMS staff members are always available to provide assistance, your Human Resource staff will be able to effectively and efficiently utilize, maintain and update job classifications and wage structures provided by the Study.

Description of Methodology

This is a Compensation Project of approximately 62 job classifications as referenced in documents provided by Livermore School District (District). The Project will incorporate “essential functions” based job analysis, application of an equity-based point factor classification model specific to the field of education, internal validation, and specific recommendations. In addition, as requested by the District, EMS will provide an external market survey of the current salaries.

This Project will be a collaborative effort between the District and Educational Management Solutions (EMS). However, EMS will be responsible for the overall management of the Project, conducting the major processes and ensuring that the outcomes are achieved.

District Participation: The District will assign an individual to act in a coordinating role with EMS. The coordinating role of the District administrative staff will be primarily limited to scheduling Project activities that involve District personnel (e.g., meetings, incumbent focus groups, etc.) and distribution of EMS developed materials for employee feedback.

In addition, the District will provide selected Human Resources staff members who will be trained in job “best practice” function-based description design and internal equity based strategic compensation planning.

Specific components of the Project will include:

Planning: This phase provides an opportunity to review and confirm the scope of the Project, identify critical activities, analyze the District’s current job descriptions and related practices, develop timelines, and assign specific responsibilities. This planning phase will reduce the Project’s duration and ensure efficient utilization of District resources. This phase includes:

Project Management - During this phase, EMS will meet with District representatives to confirm the classifications for analysis, Project process and timelines. Consideration will be given to the District’s desired level of defensibility, resources available, limitations of work setting/schedules and indirect cost factors. Once these factors have been reviewed, the sources of information and the appropriate methods of data collection can be

finalized. A Project Plan identifying key Project components, responsibilities and time frames of EMS and District personnel will be the output of this phase. The Plan will serve as a “road map” for the Project.

Project Communications – Under the direction of the District, EMS will hold a variety of communication sessions thorough the project to ensure that employees, labor unions, department heads, and managers stay informed regarding study processes and are able to ask questions regarding process, data, and results.

Why Doesn't EMS Use Position Information Questionnaires?

Best practice research indicates that requiring employees to complete position information questionnaires in an undirected manner is uncomfortable and generally not effective. This method of data collection is typically *only used in order to save cost, reduce study time and/or when high-quality analysts are not available*. In a 2014 survey performed by the Society of Human Resource Management (SHRM) in collaboration with and commissioned by ACT it was found that the leading method of conducting job analysis is Interviews (50%); followed by Observation (33%); and that Structured Questionnaires were utilized least often (27%). Additionally, in their college textbook *Human Resource Management – 9th Edition*, Robert L Mathis & John H Jackson identify some of the major disadvantages of this method as being that “the questionnaire method assumes that employees can accurately analyze and communicate information about their jobs. Employees may vary in their perceptions of the jobs, and even in their literacy.”

Our multi-staged data collection approach which includes 1) Focus Groups (Small group brainstorming interviews) followed by 2) supervisor validation meetings and then 3) distribution of draft job descriptions to all employees during our data collection and job analysis processes. This multi-layered structure maximizes both employee participation and accuracy of results. Small group interview (brainstorming) processes have been identified as “best practice” by industry experts. In a recent SHRM presentation Patricia A. Meglich, Ph.D., SPHR, stated that interviews generate “deep information” and “rich qualitative data”. The Congressional Management Foundation found that these small group – brain storming activities “make the process more enjoyable (and less avoidable) and usually will identify some relevant tasks that staff, working by themselves, may forget to include”. Finally, the authors of the textbook *Human Resource Management – 9th Edition* state that especially “For certain difficult-to-define jobs, group interviews are probably most appropriate”.

Over the past two decades, EMS has built upon the “best practice” industry standard practices to develop and perfect a process that is precisely suited for educational systems and allows all employees and supervisors guided opportunities to provide input in an effective and comfortable manner. In addition, this multi-step structure provides the checks and balances needed to ensure no relevant job information is missed and that the most accurate and actionable data possible is provided to our clients.

Job Analysis: The overriding philosophy of the Project is to develop reliable and defensible information upon which the Project's recommendations are based. The heart of the Project is the job analysis process. This phase will determine the functions of a job and identify those essential functions in accordance with the Americans with Disabilities Act's guidelines developed by the Equal Employment Opportunity Commission (EEOC). The process will organize, for each job classification, the essential and marginal job functions, the prerequisite requirements, and other related job information. This process will result in the development of up-to-date job descriptions for each classification and serve as the foundation of job information for the Project's Job Valuation and Market Survey phases. **The process will ensure the opportunity for input of every employee currently performing in the studied job classifications.** This phase includes:

Focus Group Interviews - Each job classification will be analyzed through a combination of focus group and/or individual interviews of a sample of employees within each of the studied classifications. Participation of current employees performing the specific job functions has been held to be the most "defensible" process in the development of job information upon which compensation and future employment decisions are based. Employee involvement has the additional benefit of increasing "buy-in" to the final recommendations. The number of incumbents that participate in the Study will be based on a combination of District philosophy and available staff resources. It is estimated that approximately 20 focus groups will be required to gather the required job information.

Validation of Data – Trained EMS representative(s) will meet with immediate supervisors and administrators to review and revise Drafts of collected job information data and to verify specific job specific competencies. EMS and District Human Resources staff will facilitate this process to ensure that the information is complete and accurate.

Description Drafts – Draft job descriptions for each studied classification will be developed following validation of the job content by supervisors. The draft job descriptions will contain job information that identifies the "essential" and "marginal" functions as defined by the Americans with Disabilities Act (ADA) and in conformance with the related guidelines of the Equal Employment Opportunities Commission (EEOC), ensure the functions are related to the purpose of the job, and address other related job information such as prerequisite job requirements of skills, knowledge, abilities, etc. to expand the sample and provide the opportunity for "inclusion" of all employees in the job analysis process, these drafts will be distributed to every incumbent for review prior to development of the recommended job descriptions.

Compensation Structure Analysis: All current District compensation structures and guidelines will be collected and analyzed for strategic planning, format, consistency, and overall comparability to the compensation structures of competing school and non-school market sources.

Job Valuation: This phase, also identified as *Internal Equity Analysis*, will include analyzing the job information gathered from the job analysis phase utilizing an education-based matrix of thirty-four multi-level classification factors guided by “equal pay” principles. This will provide an analysis of the job’s prerequisite requirements in relation to the degree of Complexity, Skills, Knowledge, Abilities, Responsibility, and Working Conditions associated with performing the job. The analysis will serve as the foundation for development of findings regarding the internal equity of the District’s current salary schedules.

Why Does EMS Use Point-Factor Comparisons?

Point Methods are the most widely used job evaluation method because they are more sophisticated and objective than other (ranking and classification) methods. Advantages of using this system of internal equity analysis include the fact that it reduces supervisor and/or interviewer subjectivity / bias and provides a more comprehensive view of each job classification studied. Finally, this method also evaluates the essential components of every job studied before current pay structure and market competitiveness are considered. This, again, ensures a multi-tiered strategy of 1) internal equity analysis; 2) comparison to current wage structures; and then 3) identifying levels of market competitiveness.

EMS has developed a very sophisticated yet easy to utilize, school specific point-factor analysis rubric consisting of 34 competencies. Over two decades, EMS has worked with client educational systems to identify and refine these competencies and to identify precise wording that is then used to delineate consistent criteria for developing the internal equity structure best suited for each of our client educational systems. These competencies are designed to identify the skills, knowledge, working conditions, levels of responsibility and abilities that incumbents need to possess to successfully complete the functions of each job classification. This process ensures consistency and the highest level of accuracy.

The phase will include:

Review of Internal Equity Point Factors - EMS will review with the Steering Committee the multi-point factor job evaluation system. The review provides the Committee with an understanding of internal equity principles of compensation.

Data Analysis - Each job's prerequisite requirements will be rated and a weighted value determined for each classification. Classifications will be ranked based on a job’s weighted value compared to its placement on the salary schedule. Preliminary recommendations regarding appropriate salary schedule placement will result from this internal equity analysis.

Findings - The data analysis will result in the development of findings with regard to the internal equity of the District’s salaries for the studied job classifications. These findings will provide a foundation for recommendations presented in the Study’s Final Recommendations.

Market Survey: EMS will conduct an analysis of the compensation for comparable positions at Districts and other employers within the competitive marketplace. It is recommended that the market sample be uniform for all studied job classifications to reinforce the “fairness” of the process. In selecting sources to be surveyed, priority will be given to those within the geographic proximity to the District and/or of a similar size and scope. This phase will include:

Design – In consultation with District administration, EMS will confirm with the Stakeholder Committee the organizations to be surveyed and the representative job classifications to serve as benchmarks. While specific numbers cannot be quantified at this time, based on past experience, it is anticipated that a combination of 8 - 12 educational systems and/or mutually identified public agencies and/or private sector employers will be surveyed. Approximately 35% of the current job classifications in each grouping will serve as benchmark classifications. The final numbers of market sources and benchmark classifications will be determined in consultation with the District.

Classification Data Collection – Compensation practices for the matching benchmark positions will be gathered through a combination of surveys and interviews with the appropriate personnel at each of the surveyed Districts. Benchmark jobs often have similar titles in surveyed organizations but not necessarily similar functions and/or prerequisite requirements. When this is the case, only data from jobs with similar functions and prerequisite requirements will be recorded.

Data Analysis – The market salaries and related compensation factors for the benchmark classifications will be analyzed. Selected benchmark classifications will be representative of the job classifications across the ranges of each of the salary schedules of the studied classifications. Other classifications will be slotted as to their relative position to the benchmark classifications within each schedule.

Classification Findings – The data analysis will result in the development of preliminary findings regarding the market competitiveness of the District’s salaries for the benchmark classifications. These findings will provide a foundation for recommendations presented in the Study’s Final Report.

Strategic Compensation System Design: A comprehensive analysis of current compensation structures, District goals and objectives, and competing employer compensation structures will be completed. From this information, in conjunction with District leadership, EMS will develop recommended *strategic* and *sustainable* compensation structures for all studied job classifications. This strategic structure will provide the platform necessary to fully meet the needs, budget conditions, and strategic direction of the school system. Further, the development of implementation plans that provide direction in a timely and employee friendly manner will be completed.

Report Development: A *Classification Study Report of Findings & Recommendations* that integrate all of the Study components with findings, conclusions, recommendations, and implementation strategies will be produced.

This phase includes:

Preliminary Findings - Preliminary findings of both the Internal Equity Analysis and External Market Analysis will be developed and reviewed with the Steering Committee and District Administration for input prior to development of the final recommendations.

Final Recommendations - The Study's *Findings & Recommendations* will be submitted to the District for action. The Recommendations will provide the following:

- Recommended Job Descriptions (*Job Classification Specifications*) that are in conformance with applicable laws, rules and regulations.
- Salary placement recommendations of specific classifications based on the integration of findings from the Job Valuation (internal equity) and Market Survey (external equity) analyses.
- Recommended leave structures.
- Recommended salary administration and compensation practices.
- An appeals procedure to address reclassification requests over time.

Final Recommendations Presentation – Following development of the Final Recommendations, EMS will be available to make a single presentation of a summary of the Study's Findings and Recommendations if requested at no cost. Additional requested presentations will be provided with charges limited to out-of-pocket expenses.

Final Recommended Job Descriptions: Final recommended job descriptions will be provided for final approval and usage. Final job descriptions will contain job information that identifies the “essential” and “marginal” functions as defined by the Americans with Disabilities Act (ADA) and in conformance with the related guidelines of the Equal Employment Opportunities Commission (EEOC), ensure the functions are related to the purpose of the job, and address other related job information such as prerequisite job requirements of skills, knowledge, abilities, etc. In addition, job classifications that meet the exemptions will be identified in the Fair Labor Standards Act (FLSA) will be identified.

These job descriptions, in conjunction with *JobsPlus*[™], can be used in a wide variety of ways including: Recruiting, selection, hiring, employee appraisals, staffing analysis, wage planning, ADA accommodations, workers compensation, etc.

Software Application: The District will be licensed with the proprietary software *JobsPlus*[™] for use in the development and management of job information. The software will contain all of the job information gathered during the course of this Project and will allow the District to continuing maintaining a fair, equitable, and defensible process in making job related decisions based on accurate job classification data. This phase would include:

Software Customization - Data will be provided in a software format which can be utilized for the development and updating of Job Descriptions, distributing Job Announcements, development of Performance Appraisals and Individual Work Improvement Plans, and analyze Reasonable Accommodation and/or Early Return-to-Work decisions.

Software Training - District personnel will receive “hands on” training. Training will focus on maintaining collected job information, generating new job descriptions, and utilizing each of the software features.

Software Installation - At the conclusion of training, the District will be provided the most current version of the software *JobsPlus™* in accordance with current licensing agreements.

License & Client Support - EMS will license the software for use by the District through 6/30/2023. The annual software license fee of \$895 will be waived through the end of the overall project.

Why EMS Allows Clients to Use JobsPlus™?

Educational Management Solutions is committed to providing the *training and tools you need to maintain accurate job descriptions and classification placements after the completion of the study.*

In addition to the post-study reference materials provided by other consultants, EMS will license the District to use our proprietary software *Jobs Plus™* at no additional cost.

Our exclusive *Jobs Plus™* software solution is the most utilized job description design and classification software solution used by school systems across the United States. With this software solution your HR staff will be able to follow a step-by-step process to maintain the accuracy and legal compliance of your job descriptions and related classifications as you walk through an organized ongoing reclassification process with employees and supervisors when functional job changes occur.



In addition, *JobsPlus™* provides reports and analysis for Job Postings, Hiring and Placement, Ongoing Wage equity, Workers Compensation, ADA Accommodation, and Employee Performance Evaluations. With *JobsPlus™*, EMS truly is your partner for effective, school-specific HR Solutions.

Project Integration: EMS and District Administration will work jointly to assure acceptance of the process as one that reflected “fairness”. Every effort will have been made to secure input from affected employees and administration prior to making recommendations. EMS personnel will be available for a 90-day period for phone and web-based consultation at no additional cost to assist the District in implementing the recommendations contained in the Project’s *Findings & Recommendations*.

Project Timeline

Following are projected Project component completion dates. The key factor in maintaining this schedule will be the District's ability to coordinate and schedule resources. The following timeline assumes a start date of is yet to be determined.

<u>ACTIVITY</u>	<u>Approximate Project Timeline</u>
Planning	
Study Management: includes collaboration with District Administration to review scope of Study; identification of primary contacts; defining job classifications and role of steering committee; scheduling initial meeting of committee; scheduling focus groups; reviewing timelines, etc.	TBD
Stakeholder Committee Development & Orientation: includes review of Study activities, overview of processes, and identification of market sources.	Approximately 2 wks after start
Job Analysis	
Begin Data Collection: includes conducting focus group and individual interviews.	Approximately 4 wks after start
Complete Classification Data Collection: completion of scheduled focus groups. Makeup sessions may be scheduled as appropriate during the course of the study.	Approximately 7 wks after start
Validation of Classification Data: includes development of draft job information collected for distribution to supervisory staff and focus group participants for review.	Approximately 8 wks after start
Return of Classification Data: includes return of draft job analyses for analysis and modification as appropriate.	Approximately 12 wks after start
Final Job Descriptions: includes development of draft job descriptions based on validation process for distribution to all incumbents.	Approximately 18 wks after start
Job Valuation	
Review of Classification Instrument: includes training on process and review of education-based job valuation weighting factors.	Approximately 6 wks after start
Data Analysis: includes job evaluation factor weighting and comparison to salary schedule(s).	Approximately 10 wks after start
Application of Classification Instrument: includes evaluation of all classifications.	Approximately 14 wks after start

Market Survey

Design: includes training on process, identification of Districts and other public/private organizations to be surveyed, and selection of job classifications as benchmarks. Approximately 8 wks after start

Begin Data Collection: includes combination of personal and phone interviews with identified survey sources and follow-up phone contact as may be required. Approximately 12 wks after start

Complete Data Collection & Data Analysis: includes analysis of market data and identification of additional follow-up as may be required. Approximately 20 wks after start

Development of Recommendations

Classification Recommendations: includes review of preliminary recommendations with District Administration and Stakeholder Committee for input. Approximately 22 wks after start

Final Recommendations: includes description of all Study phases, final job descriptions, cost and non-cost recommendations, and implementation planning strategies. Approximately 24 wks after start

Software Applications

Software Customization: includes loading software with Study's information. Approximately 24 wks after start

Software Training & Update: includes installation and formal hands-on training of software. Scheduled at District's convenience

Client Support: initiated with software license that includes unlimited phone support through June 2023. Following software training

Notes:

* *Completion of Study is dependent on the District's ability to schedule resources within the indicated time frames.*

* *Time frames can be adjusted based on the District's requirements.*

Recommend Appeals Process

Educational Management Solutions and District Administration will work jointly to assure acceptance of the process as one that reflected “fairness”. Every reasonable effort will be made to secure input from employees and gain consensus on information upon which the recommendations are made. However, there are circumstances that can generate questions from specific employees and/or groups of employees. Employees should have an opportunity for a reasonable hearing for their questions. Throughout the appeals process, while responding to employees’ questions the following concepts/distinctions are important.

Job vs. Position - A specific employee’s job assignment may require performance of job functions different from the norm due to unique demands of a particular job setting, a supervisor’s expectations, an employee’s interest and desire, and/or in situations of providing for growth. None of these situations necessarily would indicate that the employee has a “different job” or is “working out of class” but rather the employee is defining a *position description* versus a *job description*.

Function vs. Methods or Tasks - Typically jobs have been defined by a combination of functions, methods, tasks, requirements, etc. The defining of a job by its functions (essential and non-essential) is the most inclusive approach and has been found to be defensible when using as the basis for employment decisions. Job functions are most closely related to the overall purpose of a job with tasks serving as sub components or steps required to complete a function and methods relating to how the job is performed. Often employees may focus on how the job is done rather than that of the purpose of the job as defined by the job functions.

Changes in Functions - Due to organizational changes, environmental (site) conditions, different equipment and/or new technology, job functions may be added / deleted or job requirements change over time. This factor is a significant concern in updating all job descriptions is a significant component of the Classification Project.

Incomplete Data - During the processes of updating job information there may be instances where the job information collected is incomplete. While every effort is made to keep this situation from occurring it is conceivable that the sample of incumbents that participated in the Project was not representative of the job class as a whole. The validation process provides employees an opportunity to review the focus group data, supervisor’s review and committee review should have eliminated this concern.

The appeal process for the Classification Project and that used for periodic requests for reclassification should be essentially the same. The following suggested guidelines apply equally to both processes:

Timing - It is recommended that a specific timeframe (i.e., 30 days annually) be established for appeals or requests for reclassification. This condenses the administrative efforts, allowing the least disruptions to workloads, focuses the effort of all parties to reach sound decisions and is least disruptive to morale.

Written Documentation - A Job Classification Review Form developed setting out specific procedures incorporating the following:

- Procedures for submission
- Procedures for review and disposition
- Basis of request by employee

Basis of Request - Terminology and definitions should be consistent and understood by all parties, i.e., essential functions, task/method, requirements, etc. The basis of the request should be guided by factual information on how the job differs from that described. Valid basis for review should be focused on the following:

- Essential Functions performed have changed and are at variance with Job Description
- Job Requirements have changed and are at variance with Job Description
- Standards of Performance have changed requiring difference skills, knowledge and abilities
- Initial decisions were based on inaccurate information

Classification Review Committee - The District may wish to develop an appeals committee. Such a committee, with the process and authority (fact finding and advisory) clearly defined, can provide both valid input and objectivity to the eventual decision.

Decision Making Process: The process may vary based on the stated justification for the request, however, assuming that the initial job data is current, the normal review should focus only the following three areas:

- Evaluation of Published Job Functions. Analysis should ensure that employee's justification statement of new and/or additional functions is not a semantic restatement of a function, a listing of tasks and/or the usual and customary methods of performing the function.
- Review of the Pre-requisite Job Requirements. Due to organizational changes, new equipment, and/or new technology employees may perceive that the job has changed to an extent justifying re-classification. In today's labor market it is not unusual for 50% of the skills and knowledge required for a job to be out of date within 3 years. This is a common trend across all industries and new requirements placed on an employee to maintain performance should not alone be the factor guiding re-classification. Measures can be used to determine how changes over time have impacted the skills, knowledge, abilities, responsibilities and working conditions necessary to perform the jobs' functions. For each job classification over 30 factors were evaluated as part of this Project and review of these factors can provide a level of objectivity for all parties. It is also necessary to determine if changes in job requirements indicate a trend that has impacted all positions or only a few.

- Impact on Internal Relationships. An understanding of how a potential recommendation impacts other positions, the overall salary schedule structure and finances is equally important. Condensing the time period for review can assist in putting the recommendations into perspective in relationship to the overall personnel and financial impact.

Ongoing Maintenance of Job Classifications

The final goal of Educational Management Solutions will be to equip your District with the information, training, and tools needed to maintain the accuracy of the job description design and compensation structuring provided by the Project itself.

Upon the completion of the classification Project, Educational Management Solutions will provide comprehensive, customized training to your Human Resources staff. Further, we will work with your HR staff and employee groups to design an ongoing reclassification process that will meet the needs your District and complies with all relevant guidelines.

Through the use of this training, our detailed instruction manual and (most importantly) our exclusive *Jobs Plus™* job description design and classification software solution, your HR staff will have all of the tools you need to easily and accurately maintain your job descriptions and related classifications.

Our exclusive *Jobs Plus™* software solution is the most utilized job description design and classification software solution used by school systems across the United States. With this software solution your HR staff will be able to follow a step-by-step process to maintain the accuracy and legal compliance of your job descriptions and related classifications as you walk through an organized ongoing reclassification process with employees and supervisors when functional job changes occur.

Project Cost and Method of Payment

EMS has analyzed the District's objectives and the following references the Study's phased components as described in the body of the referenced proposal. Also identified are the deliverables of each phase for purposes of monitoring and invoicing. The percentages to the right of each project phase are listed to allow the district to pay "progress payments" as study components are completed".

The total cost for completion of this study is \$58,995 including all travel, printing, and related expenses.

Planning – Plan Development: Payment: 20%

The deliverable will be a finalized project schedule detailing activities, targeted completion dates and responsibilities.

Job Analysis – All Classifications: Payment: 30%

The deliverable will be completion of the scheduled data collection / focus groups.

Job Analysis - Validation of Data: Payment: 20%

The deliverable will be submission of initial drafts of the collected data for validation by supervisors, steering committee members and/or administration.

Market Survey: Payment: 15%

The deliverable will be completion of the Market Survey and Analysis for review with District administration.

Findings & Recommendations: Payment: 10%

The deliverable will include review of preliminary findings and strategic compensation structure development with District Administration and Steering Committee for additional input.

Final Recommendations: Payment: 5%

The deliverable will be completion of the Study with the *Compensation Study Findings & Recommendations*.

Software Applications: Software/Training/Installation: No Additional Cost

The deliverable will be the software referenced in the *Description of Methodology - Software Applications* section of this proposal. Support will be provided as described until June of 2023 following installation with the annual license support fee of \$895 waived during this period.

Project Integration: Limited to Out-Of-Pocket Expenses

EMS personnel will be available during a 90-day period immediately following submission of the Study's *Findings & Recommendations* for consultation with regard to utilization of developed job information and implementation of the recommendations. Charges to the District will be limited to out-of-pocket expenses for requested on-site activities during this period. An exception will be for the initial presentation, if requested, of the Study's Findings and Recommendations that will be provided at no charge. Services provided related to the Study beyond this 90-day period for requested onsite services will be charged at a rate of \$750 per consultant per day plus expenses.