

Carmichael

RECREATION AND
PARK DISTRICT

Memo

To: The Advisory Board of Directors

From: Mike Blondino, District Administrator
Ingrid S. Penney, Administrative Services Manager

Date: February 17, 2022

Subject: Compensation Study Contract Award

Introduction/Background:

On January 4, 2022, CRPD sent out and published a Request for Proposals (RFP) for a Compensation Study. The Study would cover selected current and proposed full-time positions with a goal of ensuring that CRPD's pay structure is equitable, and that salaries and benefits are comparable to those paid in the relevant labor market. For future planning, Staff identified some other job classifications which may be necessary for the District to achieve its future goals and objectives.

Current, selected journey level positions within each category or unique/one of kind positions to be included in the study:

1. District Administrator
2. Administrative Services Manager
3. Parks Services Manager
4. Recreation Services Manager
5. Finance Supervisor (vacant)
6. Recreation Supervisor
7. Park Lead Worker (past position/vacant)
8. Park Maintenance Worker II
9. Recreation Coordinator
10. Bookkeeper
11. Payroll/Account Clerk
12. Customer Service Representative

Positions for future planning to be included in the study:

1. Project Manager
2. Analyst (generalist)
3. Human Resources Supervisor

Discussion:

On January 21, 2022, proposals were due and only one was received. The respondent was Grace Consulting. Although only one proposal was received, it met our project qualifications and requirements. The proposal is attached for your review and information.

The owner and principal consultant, Kathleen Grace has over 30 years of experience in human resources and organizational development, providing services to both public and private sector organizations. Projects have included: Total Compensation Studies, Salary Range Structure Development, and Organizational Development. Sunrise Recreation and Park District is one of the public agencies on the client list. CRPD has taken part in past surveys for compensation studies performed by Grace Consulting, so Staff is familiar with the method employed and resultant report.

Financial Analysis:

The FY2021-22 Adopted Budget includes funding to perform a Compensation Study. Sufficient funds are available to cover the proposal's project costs. Grace Consulting will only charge for the actual hours and expenses to perform the work. The total cost of the Study will not exceed \$12,470.

Recommendation:

Staff recommends approval to award a contract to Grace Consulting based on the proposal received to perform a Compensation Study for the Carmichael Recreation and Park District for selected current and proposed future full-time positions; authorize the District Administrator to negotiate and sign the contract, in an amount not to exceed \$12,470.

Grace Consulting
5108 Cowell Boulevard
Davis, CA. 95618

February 8, 2022

Ms. Ingrid Penney
Administrative Services Manager
Carmichael Recreation and Park District
ingrid@carmichaelpark.com

RE: Revised Bid to conduct a Compensation and Benefits Study

Dear Ms. Penney:

Grace Consulting is pleased to submit to the Carmichael Recreation and Park District this revised bid to conduct a compensation and benefits study within the relevant labor market for twenty (20) current and proposed District job classifications; to develop and present salary and benefits recommendations that are based on market competitive and internal equity factors; and to assist with the implementation of approved changes.

Kathleen Grace will serve as principal consultant for this project. Ms. Grace is uniquely qualified to provide the full range of services described in your request for a proposal. She has over 30 years of professional experience in conducting classification, compensation, benefit and organizational studies for a broad range of public sector organizations, public utilities and special districts.

If you need additional information, please contact me by phone at (530) 756-5269 or by email at graceconsulting@earthlink.net. Additional information about Grace Consulting can be found at <http://consultingbygrace.com>. I look forward to the opportunity to provide the District with professional consulting services specific to the needs of the District.

Sincerely Yours,



Kathleen A. Grace, Principal Consultant
Grace Consulting



Revised Proposal

To Conduct

A Compensation & Benefits Study For Current and Possible Future District Job Classifications

January 2022



GRACE CONSULTING

5108 Cowell Boulevard
Davis, Ca. 95618
(530 756-5269

graceconsulting@earthlink.net

A. INTRODUCTION:

As requested by Ingrid Penney, Administrative Services Manager for Carmichael Recreation and Park District (District), Grace Consulting is pleased to submit this revised bid to conduct a compensation and benefits study of ten (10) comparable recreation and park districts and public sector organizations within the relevant labor market for fifteen current and proposed job classifications, and to assist with the implementation of recommended and approved changes.

B. PROJECT GOALS AND OBJECTIVES:

The District is initiating this study to ensure that the District’s compensation structure is internally equitable and that salaries and benefits provided by the District are competitive with those paid by comparable organizations within the relevant labor market.

Grace Consulting is firmly committed to completing all steps of the project as described in the RFP with a focus on quality, timeliness and achieving overall project objectives.

C. QUALIFICATIONS AND REFERENCES:

Ms. Kathleen Grace, Owner of Grace Consulting, will serve as Principal Consultant for this study. She has over 30 years of in-depth classification and compensation experience. The following table provides a sample of recent comparable projects that she has conducted and related references.

CLIENT	PROJECT
<p>Client: Sunrise Recreation and Park 7801 Auburn Blvd Torrance, CA 90503 Citrus Heights, CA 95619</p> <p>Contact: Lee Hollingsworth, Admin. Services Mgr. (916) 725-0140</p>	<p>Total compensation study for all District classifications repeated and completed 2016. Full classification and total compensation study conducted in (2006) plus various other classification and salary studies in 2011, 2012, 2016, 2017 and 2020)</p>
<p>Client: City of Patterson 1 Plaza Circle Patterson, CA 95363</p> <p>Contact: Di Smith, Director of Human Resources (310) 618-2965</p>	<p>Total Compensation study for all AFSCME represented job classifications. Base Salary study for all supervisory, professional and mid-management job classifications. Other projects: Salary structure analysis for Fire Unit; market research and salary recommendation for City Manager salary. (In progress) classification study for all AFSCME and mid-management job classifications. (2018, 2019-2022)</p>
<p>Client: Glenn-Colusa Irrigation District 344 East Laurel Street Willows, CA 95988</p> <p>Contact: Karen Aves, Admin. Services Manager (530) 934-8881</p>	<p>Total Compensation study for all District positions. Development and presentation of salary range structure for management, supervisory, confidential and exempt professional classifications.</p> <p>2018-2019</p>

CLIENT	PROJECT
<p>Client: American River Flood Control District 165 Commerce Circle, Suite D Sacramento, CA. 95815</p> <p>Contact: Tim Kerr, General Manager (916) 929-4006</p>	<p>Total Compensation study for all District positions. Base salary survey. (2014 and 2018)</p>
<p>Client: Oakdale Irrigation District 1205 East F Street Oakdale, CA. 95361</p> <p>Contact: Steve Knell, General Manager (209) 840-5519</p>	<p>Total Compensation study for all District positions. (2019)</p>
<p>Client: City of Sebastopol 7120 Bodega Avenue Sebastopol, CA 95472</p> <p>Contact: Anna Kwong, Finance Director (707) 824-4879</p>	<p>Base Salary study for al City job classifications that included identification of relevant market organization and included findings and recommended salary adjustments. (2019)</p>

D. ABOUT GRACE CONSULTING:

Grace Consulting is a WBE certified sole proprietorship headquartered in Davis, California. Grace Consulting was founded in 2003 by Kathleen Grace to provide a broad range of Human Resources, Organizational Development and Change Management consulting services to private and public sector organizations, non-profits, public utilities and special districts.

Grace Consulting operates as a virtual organization comprised of a networked team of highly experienced independent professionals. Through Grace Consulting, clients’ needs are matched to the specialized expertise to ensure successful results through a single-point of contact for all services retained. Each project team is designed and staffed with the particular talents and experience required for the tasks at hand. Overhead costs are minimal as there is no "warehousing" of staff awaiting projects. Our clients pay only for the resources they use.

The Grace Consulting network of independent professionals possesses a broad range of expertise to meet a variety of organizational issues and priorities. All members of the Grace Consulting network have been pre-screened and evaluated based on proven experience and client recommendations.

E. METHODOLOGY:

To achieve the objectives of this project, the consultant will perform the following activities:

- Meet and/or confer regularly with the District’s designated project representative(s): to establish project parameters, goals and objectives; to gather information for analysis and evaluation; to discuss issues identified for resolution and preliminary findings and

recommendations for appropriateness and best fit; and to keep the District informed of the ongoing status of the project.

- Research to identify and discuss comparable District's and agencies for market comparability.
- Review all pertinent documentation to develop an understanding of the nature and scope of the work performed by positions within each classification. This will include: current job descriptions, organization charts, salary tables, benefit plans, any existing labor agreements and other pertinent documentation.
- Gather Job Content Information from District Management to develop and understanding of expectations for the jobs that may be added to the structure in the future for which market data is to be collected.
- Develop a compensation and benefits survey instrument: to gather requisite salary and benefits data from appropriate benchmark organizations and submit the survey to the District for review and approval prior to distribution and data collection.
- Develop summary job descriptions for all jobs for which market data is to be collected: to aid in identifying comparable jobs by consultant staff and participating survey organizations.
- Conduct a salary and benefits survey of ten (10) comparable special districts and public sector organizations using a variety of methods including online research, email, phone, and/or surface mail to gather the information needed to conduct market comparability analyses and to develop salary and benefit recommendations.
- Analyze all market data collected and develop findings and recommendations based on the District's compensation philosophy and that considers internal equity and market comparability factors; analyze and compare benefit programs to determine market comparability of the District's programs and develop appropriate recommendations for change.
- Develop and present a draft report of market findings and preliminary salary and benefit recommendations to the District for review and discussion to enable completion of a final project report.
- Develop and present a final report for presentation to the District's Advisory Board that includes all findings, recommendations and project deliverables.
- Provide guidance and assistance, to District staff with the implementation of approved changes.

F. DISTRICT REVIEW:

Any work products developed during the above activities will be submitted to the District for review, comment, and/or approval. This is a very important step that helps to ensure accurate, reliable, and valid results.

G. DISTRICT RESPONSIBILITIES:

Successful completion of this project within the time specified depends largely upon the cooperation between the District and Grace Consulting staff. For this reason, we request that a project representative from the District be designated to coordinate project activities with consulting staff

The District's project coordinator will be responsible for the following activities:

1. Coordination of all meeting schedules, facilities and equipment needs
2. Identification and provision of current classification and structure information (i.e., job descriptions, salary schedules and benefit plans, organization charts, existing labor agreements and other pertinent documentation)

H. REPORTS AND RECOMMENDATIONS:

Grace Consulting will provide all reports and recommendations, verbal or written, to the District for confidential use and/or implementation. Written reports or other project deliverables will first be submitted in draft form for review and discussion. Informal communication will be ongoing throughout the project, and Grace Consulting staff will be available to answer questions, make recommendations on process and outcomes, and to provide assistance on project related matters.

I. ESTIMATED TIMELINES

Typically, this project would take at least twelve weeks to complete. To meet the District's targeted deadlines, we propose that project activities are to be completed in nine (9) weeks of active and elapsed time. The timeline below represents target timelines for the major phases of the project. In general, project activities will follow this timeline.

- **Weeks One-Two:** Initial project meeting to establish project parameters, gather documentation and identify potential survey organizations; documentation review, development of survey instrument, summary job descriptions and database, and initial contact with survey organizations to identify specific contact person.
- **Weeks Three – Seven:** Conduct salary and benefit survey online and by phone, email and/or surface mail of ten (10) comparable organizations; review, validate, enter data, conduct equity and comparability analysis of all data collected; present preliminary findings and recommendations to District management for review and discussion.
- **Weeks Eight - Eleven:** Finalize analyses and recommendations; draft and submit a preliminary report of all findings recommendations to the District for review and discussion; and edit and present a final report of market findings and appropriate salary and benefit recommendations to the District's Advisory Board for approval and implementation.

TIME, COST & ACTIVITY SUMMARY

PROJECT COMPONENT	STAFF	HOURS	RATE	COST
Project meetings and status updates, project planning and coordination	Kathleen Grace	8	\$100.00	\$800.00
Review all pertinent District documentation	Kathleen Grace	2	\$100.00	\$200.00
Research and identify comparable organizations to be surveyed within the relevant labor market and discuss findings with the District	Kathleen Grace	2	\$100.00	\$200.00
Develop a survey instrument for the District's review; and develop database to enable analysis of market data	Kathleen Grace Personnel Technician Admin Support	4 20 4	\$100.00 \$65.00 \$30.00	\$ 400.00 \$1,300.00 \$120.00
Conduct a salary and benefits survey of 10 comparable organizations online and via email/phone and surface mail.	Kathleen Grace Personnel Technician	10 40	\$100.00 \$65.00	\$1,000.00 \$2,600.00
Analyze all market data; conduct comparability analysis and develop salary and benefits recommendations for consideration by the District	Kathleen Grace	32	\$100.00	\$3,200.00
Draft and present preliminary report of findings and recommendations to the District for review and discussion	Kathleen Grace Admin Support	8 6	\$100.00 \$30.00	\$ 800.00 \$180.00
Develop a final report containing all findings and recommendations and present to the District's Advisory Board	Kathleen Grace Admin Support	6 4	\$100.00 \$30.00	\$600.00 \$120.00
Provide guidance and assistance to the District with the implementation of approved changes	Kathleen Grace	8	\$100.00	\$800.00
TOTAL HOURS	Kathleen Grace Personnel Tech. Admin. Support	80 60 14	\$100.00 \$65.00 \$30.00	\$8,000.00 \$3,900.00 \$420.00

J. TOTAL COST ESTIMATE:

a. Introduction

The cost structure of this project is made up of two major components:

- 1) Estimated hours of consultant involvement – this includes direct project time for each Grace Consulting team member or support person involved in the project.
- 2) Estimated expenses
 - **Project Expenses:** telephone, copying costs, and report material costs, etc.

b. Estimated Total Project Costs

Estimated total cost for this project should not exceed **\$12,470.00**. This amount includes:

- One Principal Consultant for a total 80 hours @ \$100.00 per hour
- One Personnel Technician for a total 60 hours @ \$65.00 per hour
- Administrative Support for a total 14 hours @ \$30.00 per hour
- Project expenses (copying, project-related phone calls, report materials, etc.)

SUMMARY COST ESTIMATE

Cost Item	Total Hrs	Rates	Estimated Maximum Cost
Principal Consultant ◇ Kathleen Grace	80	\$100.00/hour	\$8,000.00
Personnel Technician	60	\$65.00/hour	\$3,900.00
Administrative Support	14	\$30.00/hour	\$420.00
Miscellaneous Expenses (copies, phone, survey, report materials, shipping)		Not to exceed	\$ 150.00
Total Costs			\$12,470.00

K. ALTERNATIVES/ADDITIONS TO TOTAL COST ESTIMATE:

The total cost estimate has been prepared as accurately as possible given the information provided to Grace Consulting. If changes or additional service is required, Grace Consulting agrees to discuss revisions to the project activities and to the cost estimate.

For any additional work requested by the District that is not covered by the scope of this proposal, we will charge an additional hourly rate that is based upon the level of staff required. Additional expenses incurred that are not covered by the scope of this proposal will also be charged. No additional work will be undertaken without the written approval of appropriate District management

CONSULTANT RESUME

Kathleen A. Grace, MBA, CCP

As a practitioner and consultant, Ms. Grace has over 30 years of experience in human resources and organizational development providing services to a wide range of public and private-sector organizations, public utilities and special districts. Services provided include: classification and compensation studies; organizational assessments; training for employee and management development; performance management system design and implementation and workload and staffing analysis. Ms. Grace also has extensive experience in the development and management of complex multi-disciplinary project teams.

Relevant Experience

- Owner - Grace Consulting Services
- Project Manager - CPS Human Resources Services
- Adjunct Faculty - School of Business, CSU, Sacramento
- Principal Consultant - Price Waterhouse LLP
- Sr. HR Specialist - Lawrence Livermore National Laboratory
- Sr. Consultant - Applied Research Consultants, Inc.
- Training Specialist - CA Dept of Education
- Training Specialist (EWIII), Yolo County Department of Social Services
- Eligibility Supervisor, Yolo County Department of Social Services

Experience Highlights

Grace Consulting: Ms. Grace provides a broad range of human resources and organizational development consulting services to public-sector, special districts and non-profit organizations such as the counties of Sacramento and San Mateo; the cities of Sacramento, Long Beach and Torrance; Alameda County Water District, East Bay Municipal Utility District, Lake Hemet Municipal Water District and non-profit agencies such as: the California Child Support Directors Association and the California Parks and Recreation Society.

CPS Human Resources Services and Applied Research Consultants Inc: Ms. Grace conducted and/or led a variety of compensation, classification, workload and staffing studies, organizational assessments, and process re-engineering and change integration projects for state and local government organizations within California, including the cities of Pasadena, Anaheim and Sacramento, the City and County of San Francisco, Turlock Irrigation District, Sacramento Environmental Management Department, Roseville Environmental Utility Department, Lawrence Livermore National Laboratory and Napa and Kern County Courts.

CSU, Sacramento: Ms. Grace developed and delivered courses on a variety of subjects for the College of Business, including undergraduate and graduate courses on organizational and leadership theory and application, strategic compensation and human resources management theories, concepts and applications.

Price-Waterhouse LLP: Ms. Grace led and participated in several multi-year, complex change initiatives relative to the integration of enterprise-wide automated systems for large, global, Fortune 500 organizations. Project activities performed included: business process re-engineering, job redesign, workload and staffing assessments, development of performance management systems, training and documentation design, development and presentation and organizational and cultural assessments for issue identification and resolution.

Lawrence Livermore National Laboratory: Ms. Grace was responsible for the day to day administration of the management and administrative pay programs. She provided lead direction

to a small analytical and support staff, developed and coached, trained and directed the work of an organization-wide team of job auditors, developed and implemented an organization-wide position description system, served as staff consultant to Laboratory management and the Compensation Policy Committee and served as project lead on a variety of HR/Compensation projects, including development of a qualitative classification system for the administrative and management pay program guiding the classification of 4,000+ employees.

CA Department of Education and Yolo County Department of Social Services: As Training Specialist at CDE and Yolo County, Ms. Grace developed and conducted training programs for new and existing employees. Courses included: new employee orientations, the interpretation and application of state and federal program regulations, budgeting and technical processes, customer service theories and applications, interviewing techniques, stress management, change management, time and workload management, cultural awareness and conflict resolution.

Yolo County Department of Social Services: As Eligibility Supervisor served as program resource to staff assigned to federal and state-funded Medi-Cal, cash assistance and food stamp programs and provided full supervision to staffs of to 8 to 15 program technicians and administrative support staff. Led a variety of projects relative to the design and implementation of policies, procedures, and systems for implementation of program requirements and led a variety of multi functional HR projects including the development and implementation of a self-funded employee recognition program.

Education and Affiliations

- MBA (with honors), Business Administration, California State University Sacramento
- BS (with honors), Business Administration, HR Concentration, CSU Sacramento
- Member: World at Work (formerly American Compensation Association)
- Member: Society for Human Resources Management (SHRM)
- Member: International Personnel Management Association (IPMA)

Publications

- Masters Project: Compliance Guide on Title I of the Americans with Disabilities Act
- Compliance Guide for the Fair Labor Standards Act
- Analysis of the Federal Family Medical Leave Act

Certifications/Affiliations

- Certified Compensation Professional, World at Work
- Certified Senior Professional in Human Resources, SHRM (lapsed 8/2011)
- Top Security Clearance (inactive since 1996) Department of Energy