

PROPOSAL

North Central Texas Council of Governments

Compensation Study Consulting Services

RFP # 2024-018

DUE: Friday, January 12, 2024

2:00 p.m. Central

SUBMITTED BY:

VICKI QUINTERO BRASHEAR

Director of Products and Services

CPS HR Consulting
2450 Del Paso Road, Suite 220
Sacramento, CA 95834
P: 916-471-3481
vbrashear@cpshr.us
Tax ID: 68-0067209

www.cpshr.us



Your Path to Performance

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Cover Sheet

TXShare

Your Public Sector Solutions Center

REQUEST FOR PROPOSALS
For
Compensation Study Consulting Services
RFP # 2024-018

Sealed proposals will be accepted until **2:00 PM CT, January 12, 2024**, and then publicly opened and read aloud thereafter.

Cooperative Personnel Services dba CPS HR Consulting

Legal Name of Proposing Firm

J7ERNATZKCB9

SAM.GOV Unique Identity ID

Vicki Quintero Brashear

Director, Products & Services

Contact Person for Proposal

Title

(916) 471-3481

vbrashear@cpshr.us

Contact Person Telephone Number

Contact Person E-Mail Address

2450 Del Paso Rd., Suite 220

Sacramento, CA

95834

Street Address of Principal Place of Business

City/State

Zip

2450 Del Paso Rd., Suite 120

Sacramento, CA

95834

Complete Mailing Address

City/State

Zip

Acknowledgment of Addenda (initial): #1 VB #2 VB #3 _____ #4 _____ #5 _____

January 12, 2024

North Central Texas Council of Governments
616 Six Flags Dr
Arlington, TX 76011

Subject: RFP # 2024-018 Compensation Study Consulting Services

CPS HR Consulting (CPS HR) is pleased to submit this proposal to North Central Texas Council of Governments (NCTCOG) to provide comprehensive consulting services to the member agencies (Agency) of its TXShare Cooperative Purchasing Program ("TXShare"). We are excited to deliver this as your potential partner in achieving organizational excellence. With our broad range of HR services, we combine our unmatched government sector knowledge with a shared perspective to drive impactful results. We are proposing for the following categories:

Service Category #1: Consulting Services

Service Category #2: Optional Ancillary Services which include:

- a. Full Compensation Package Review
- b. Employee Engagement
- c. Recruitment
- d. Training
- e. Testing and Assessment

We are committed to delivering services that are nothing short of exceptional, and we are eager to discuss how we can tailor our solutions to best serve you. *In business since 1985*, we pride ourselves in establishing and nurturing long-term relationships with the agencies we serve as we live out our mission of bringing excellence in Human Resources to the public sector.

CONTACT INFORMATION	
Proposal/RFP Process Contact and Contract Authorized Representative	Vicki Quintero Brashear, Director of Products and Services 2450 Del Paso Rd., Suite 220, Sacramento, CA 95834 (916) 471-3481; vbrashear@cpsshr.us

Thank you for this opportunity; we very much look forward to working with the North Central Texas Council of Governments and its member agencies. Should you have any questions, please do not hesitate to contact *me at the contact information above*.

This proposal and the contents herein are valid for a total of 120 days from the submittal deadline of January 12, 2024. I am duly authorized to bind CPS HR to the terms of the proposal and into contract.

Sincerely,



Vicki Quintero Brashear
Director of Products and Services

Tab A - Capacity to Deliver

Statement of Understanding

CPS HR is excited to partner with the agencies which comprise the North Texas Council of Governments (NCTCOG). We appreciate NCTCOG's dedication to fostering collaboration and regional development across the dynamic 16-county metroplex of Dallas-Fort Worth. With a robust network of 236 members, ranging from counties and cities to school districts and special districts, NCTCOG is a driving force for communal advancement and shared success.

The TXShare Master Agreement is a pathway to unlocking tailored, strategic solutions for each participating agency. We understand that the core of this project is to ensure that agencies not only stay competitive in the job market but also uphold principles of fairness and internal equity in compensation. Our approach includes careful analysis and revamp of salary schedules, job classifications, and the functions of classified positions. We aim to ensure every role is rewarded fairly, reflecting its unique blend of authority, responsibility, and required expertise.

We are prepared to offer additional services that echo the essence of NCTCOG's vision: fostering regional growth and championing equitable practices. CPS HR's solutions will align with the overarching ambitions of each client agency, paving the way for an equitable and collaborative future.

Our Approach to the Project

CPS HR uses a comprehensive approach for planning, organizing, directing, and controlling consulting engagements. **At CPS HR Consulting, our philosophy for delivering outstanding customer service is deeply rooted in our commitment to client satisfaction and success.** We understand that every client is unique, and we tailor our approach to meet their specific needs and objectives.

Our core principles for exceptional customer service include:

- **Client-Centric Approach:** We prioritize the client's goals and vision, ensuring that our solutions align with their objectives. By actively listening and engaging with our clients, we develop a comprehensive understanding of their challenges, allowing us to provide tailored and effective solutions.
- **Open Communication:** We believe in transparent and open communication throughout the project lifecycle. Our dedicated project managers maintain regular contact with clients, providing updates, addressing concerns, and seeking feedback to ensure alignment and satisfaction.
- **Responsive and Accessible:** Our team is readily available to address client inquiries and concerns promptly. Whether through scheduled meetings, e-mail, or phone calls, we maintain accessibility to support our clients whenever needed.
- **Expertise and Innovation:** Our consultants bring a wealth of knowledge and experience to each project. We stay current with industry best practices and innovative approaches to deliver solutions that drive success.

- **Timely Delivery:** We understand the importance of meeting deadlines and project milestones. Our team works diligently to ensure projects are completed on time, and we proactively address any potential delays.
- **Continuous Improvement:** We continually assess our performance and seek ways to enhance our services. Client feedback is invaluable in this process, and we use it to refine our strategies and improve our offerings.
- **Our approach to customer service is a culture within our organization.** We are dedicated to going above and beyond to exceed client expectations, fostering long-term partnerships built on trust, collaboration, and mutual success.

Scope Exceptions, Options, or Alternatives

As a full-service HR consulting organization, CPS HR delivers an extensive suite of integrated HR solutions to government clients nationwide, and are able to fully provide the requested RFP services. Our strategic methodology is designed to elevate the effectiveness of human resources, ultimately enhancing organizational performance. With profound expertise and a unique perspective, we excel in guiding our clients in the areas of organizational strategy, recruitment and selection, classification and compensation, and training and development.

In light of our commitment to delivering holistic HR solutions, we are proposing the following ancillary services in Service Category #2: recruitment, employee engagement, training, testing and assessment. Our goal is to ensure a comprehensive and tailored solution that aligns with organizational objectives and fosters sustained success.

Our Background and Qualifications

About CPS HR Consulting

CPS HR is a client-centric human resources and management consulting firm specializing in addressing the unique challenges and complexities encountered by government and non-profit organizations. With a history dating back to 1985, **we have consistently served as a trusted advisor to our clients**, understanding their specific needs as self-supporting public agencies.

CPS HR boasts an extensive track record, collaborating with over 1,500 public agencies across the United States. Our primary focus encompasses state and local governments, public safety entities, special districts and nonprofit organizations. With an in-depth understanding of the mission and operations of Council of Governments, we bring valuable insights to our engagements.

Among our notable clients are organizations such as San Diego Association of Governments (SANDAG), Association of Bay Area Governments (ABAG), Southern California Association of Governments (SCAG), Sacramento Area Council of Governments (SACOG), and Stanislaus Council of Governments (StanCOG). Furthermore, CPS HR Consulting holds existing contracts with the California Special Districts Association (CSDA) and the CO Special Districts Property and Liability Pool to provide dedicated HR services to their esteemed members. Our rich experience and established partnerships underscore our commitment to delivering exceptional HR solutions to a diverse array of clients.

ORGANIZATION IDENTIFICATION INFORMATION	
Legal Name and DBA	Cooperative Personnel Services dba CPS HR Consulting
Main Office	2450 Del Paso Road, Suite 220, Sacramento, CA 95834; WEB: www.cpsshr.us <i>*Primary location from which services will be conducted with assistance from our Project Team Members who reside in Texas.</i>
Regional Offices	20211 Guadalupe Street, Suite 260, Austin, TX 78705 9233 Park Meadows Dr #139, Lone Tree, CO 80124 1968 S. Coast Hwy # 961, Laguna Beach, CA 92651
Type of Business/ Clients Served	Joint Powers Authority (Public Agency) Clients/Markets: Federal, State, Local, Special Districts, Education, Non-Profits
Years in Business	Established 1985
Size of Organization	111 FTEs

Our mission is to advance excellence in human resources within the public sector, and our vision is to empower individuals to fulfill the ideals of public service. CPS HR's core competency lies in our in-depth knowledge and expertise in the public sector landscape. Being a public agency ourselves, we possess a deep understanding of the intricacies and issues faced by our client base.

Organizational Structure

Joint Powers Authority

Cooperative Personnel Services, doing business as CPS HR Consulting, is a national firm and is a governmental Joint Powers Authority (JPA) of the State of California. A JPA is a public agency created pursuant to the Joint Exercise of Powers Act (Government Code 6500 et seq). This Act allows two or more government agencies to establish a new public entity authorized to exercise those powers jointly held. A JPA is an instrumentality of a state or a political subdivision of a state and is not a registered corporation of any state. Cooperative Personnel Services was established under a "Joint Powers Agreement" by the State Personnel Board of the State of California, the counties of Sacramento and Sonoma, the Hayward Unified School District, the City of Anaheim, and the East Bay Municipal Utility District, and its purpose is to provide the opportunity for the joint powers "to discuss, study and solve common or similar problems with respect to modern human resource and related management processes."

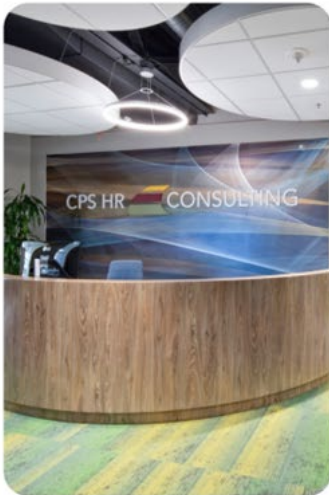
Areas of Expertise and Core Markets

CPS HR believes in an integrated, systems-based approach to talent management and provides consulting in all the key areas which follow.

CPS HR CONSULTING CORE SERVICES



**Comprehensive HR solutions
for advanced organizational
performance.**



CLASSIFICATION & COMPENSATION

- Classification
- Compensation



DIVERSITY, EQUITY & INCLUSION (DEI)

- DEI Strategic Planning
- DEI Training



HR CONSULTING

- Audit & Compliance
- HR Outsourcing
- HR Membership
- Complaint Investigations



LICENSING & CERTIFICATION

- Accreditation
- Candidate Management
- Program Management
- Testing Services



ORGANIZATIONAL STRATEGY

- Organizational Assessment
- Change Management
- Employee Engagement
- Performance Management
- Succession Planning
- Workforce Planning



RECRUITMENT & SELECTION

- Executive Search
- Mid-Management and Specialized Recruitment
- General Recruitment
- Employer Branding



TESTING

- Assessment Center
- Job Analysis
- Test Rental
- Test Administration
- Selection Tools Development



TRAINING & DEVELOPMENT

- Executive Coaching
- Training Center
- Open Enrollment Training
- On-Site Training

CORE MARKETS



Federal



State



Local



Special Districts



Education



Non-Profit Organizations

Our headquarters are located in Sacramento, California. We have regional offices in **Texas**, Colorado, and Southern California.

Our Chief Executive Officer (CEO) reports to a Board of Directors representing diverse public sector agencies across the nation. The following executive staff report to our CEO: Chief Information Officer, Chief Financial Officer, Human Resources Director, Products and Services Managers, Marketing and Business Development Director, and Senior Practice Leaders.



CPS HR BOARD OF DIRECTORS

1. Linda Andal, HR Director, City of Anaheim (CA)
2. Vincent Zamora, HR Director, City of Las Vegas (NV)
3. Fernando Yañez, Exec Director of Classified HR, Hayward Unified School District (CA)
4. Peggy Rowe, Director of HR, Pinellas County (FL)
5. Keisha Young, Dep Director of HR, County of Mecklenburg (NC)
6. LaShon Ross, HR Director/Risk Management, City of Plano (TX)
7. Joseph Hsieh, Personnel Services Manager, County of Sacramento (CA)

Experience and Capability

Our Strong Understanding of Texas Local Government

For more than 15 years, we have had the pleasure of working with many agencies in Texas on several projects. Through our direct project experience, we have developed a thorough familiarity with regional issues such as housing costs, transportation, demographics, employment rates, and economic conditions, as well as with the unique culture and diversity of the State of Texas. Additionally, we have garnered insights on the region from our current and past Board agencies – the City of Plano and the City of Dallas. Projects have included the following.

- CPS HR has conducted several executive recruitments for the cities of Dallas, Austin, Garland, Amarillo, Missouri City, Arlington, Sugar Land, Victoria, McAllen, and the County of Dallas to name a few. Additionally, we have master recruitment agreements with the Houston Housing Authority, Employee Retirement Services of Texas, and the Texas Water Development Board.
- CPS HR has had the pleasure of working with other Texas agencies on recent projects including: a total compensation study for Austin Energy and an analysis of the hiring practices for the City of Dallas. We also conducted entry-level and/or promotional public safety testing for the cities of Abilene, Amarillo, Mission, Ft. Worth, Irving, Arlington, Grand Prairie, Denison, Richardson and El Paso County.
- CPS HR performed on-site training for the cities of Waco, Alamo Heights, Irving, Pearland and the Capital Metropolitan Transportation Authority. We have also provided several regional supervisory and risk management training in the DFW area.
- CPS HR partnered with the Texas Association of Regional Councils and the Heart of Texas Council of Governments to provide free training to its members.
- We have provided Employee Engagement services for the Dallas Area Rapid Transit, the City of Houston, the City of San Antonio and the Texas Municipal Retirement System.

Service Category #1: Consulting Services*

Classification and Compensation

***NOTE: This experience comprises Service Category #1: Consulting Services and Service Category #2: Optional Ancillary Services (Subcategory: Full Compensation Package Review)**

For nearly four decades, CPS HR has stood at the forefront of classification and compensation services, bringing our expertise to a diverse array of clients. Our experience spans across state and federal agencies to the unique needs of local governments, special districts, and purpose-driven non-profit organizations. In any given year, we deliver on 40 to 60 projects of varying size and goals. Our extensive experience includes numerous projects with agencies of similar size and scope.

At CPS HR, we work beyond the usual transactional nature of business relationships. Our philosophy is rooted in partnership with a shared vision and mutual goals. We bring our wealth of expertise to the table to align it with the unique aspirations and strategies of each client.

Service Category #2: Optional Ancillary Services

Subcategory: Employee Engagement

CPS HR launched the Institute for Public Sector Employee Engagement in January 2017 to specifically focus on helping public-sector organizations measure and improve engagement as a key to maximizing organizational performance and service delivery. Under the leadership of Bob Lavigna, the Institute founding director (retired), the Institute has worked with state and local governments across the nation. Bob is a nationally recognized thought leader on engagement and human resource issues and is the author of *Engaging Government Employees: Motivate and Inspire Your People to Achieve Superior Performance* (HarperCollins Publishing) the only book that addresses the challenges of measuring and improving engagement in the unique environment of government. The Institute's approach and methodology, refined and proven in more than 130 survey projects with public-sector organizations, are based in part on Bob's book, other writings and overall thought leadership.

CPS HR's Institute has surveyed more than 230,000 employees in government organizations of all sizes, ranging from 40 employees to more than 20,000 employees. ***We have notable experience in Texas administering surveys for two of the state's largest cities of Houston and San Antonio, as well as surveys and related services for the Dallas Area Rapid Transit (DART) and the Texas Municipal Retirement System (TMRS).*** We work with cities, counties, state agencies, and special districts from all over the United States. We are uniquely qualified to help Agencies with their employee engagement surveys.

Subcategory: Recruitment

CPS HR specializes in the recruitment and selection of key professionals for cities, counties, special districts, and non-profits. Working in partnership with the governing body or selection team, we develop customized search strategies that focus on locating and recruiting qualified candidates who match the Agency's unique needs. Our wealth of recruitment experience has been gained through ***more than 20 years*** of placing top and mid-level executives in public agencies throughout the United States.

- **Unmatched Recruitment Experience for Government Agencies.** CPS HR has extensive experience in recruiting executive-level professionals for public agencies across the United States. As a public agency ourselves, we understand how to work with and within government. Our understanding of public sector culture and policy uniquely sets us apart from our competitors.
- **Seasoned Executive Recruiters.** Our recruiters possess a high level of expertise in recruiting and placing executive-level professionals. Our staff of experts includes an exceptional group of full-time employees as well as a full complement of subject matter experts, intermittent employees, and part-time employees with a variety of public and private sector experience.
- **Detailed Needs Assessments.** We conduct a detailed needs assessment to identify 1) future organizational direction; 2) challenges facing the position; 3) the working style and organizational climate; and 4) required core and job specific competencies as well as personal and professional characteristics.
- **Success Recruiting Non-Job Seeking Talent.** We recognize that the very best candidates for some types of positions may not be looking for a career change, therefore, our recruitment team takes a very aggressive approach to identify and recruit such candidates.
- **Vast Pool of Public Agency Contacts.** CPS HR maintains a database of candidates and an extensive network of external resources to leverage for executive-level positions. We utilize our vast pool of public and non-profit contacts to deliver a strong list of competitive candidates who will be well prepared to assist you in the accomplishment of your specific mission and goals.
- **Satisfied Clients.** *Our executive search client satisfaction rating averages 4.6 on a scale of 5.* Few companies measure the impact of client satisfaction by distributing written surveys and tying the results of these surveys to their performance management system. CPS HR does just this. CPS HR sends a client satisfaction survey at the end of every engagement requesting feedback on the quality of our staff, deliverables, and the overall consulting relationship.

Subcategory: Training

CPS HR's services include our wide range of training expertise that will enable members to partner with us to deliver a full complement of training and development. With over 75 consultants/ instructors/ facilitators, we can fulfill needs on a continual and timely basis with staff who specialize in working with public sector organizations.

CPS HR will respond promptly to Agency requests for training. We are readily available to meet, learn your desired outcomes, assess level and needs of target participants, and deliver services that exceed your expectations. Timetables will be established and met. Relevant evaluation data or follow up assessments or reports can be provided if required.

Our highly qualified instructor/facilitators have been chosen for their subject matter expertise, passion for training, and effectiveness in adult learning transfer and retention. ***CPS HR has been, and is regularly and continuously engaged, in the business of providing training since 2004.***

- CPS HR has experience working with a diverse student/experience base with persons of various educational, generational, and multicultural backgrounds.
- Our staff experience is focused on serving the training needs of public sector clients. As a public agency ourselves, we understand the training and organizational challenges agencies face, especially working in a union and Civil Service environment.

- CPS HR personnel have the technical knowledge and the classroom management skills to handle logistical and behavioral situations as they arise.
- Our talented team of instructors has expertise in a wide variety of areas and the majority have more than 15 years of experience as instructors and facilitators.

Over the last three years, we have served on average 30,000 students per year, delivered more than 1,000 training courses (across 14-categories) virtually, and at client sites and served 70+ clients annually.

We believe the advantages of using our expertise include:

- ***A public agency.*** As a self-supporting public agency we have a good understanding of your challenges and needs. CPS HR has been helping public agencies, non-profits and professional associations meet their human resource needs since 1985.
- ***A go-to training resource for public agency employees for over 35 years.*** We provide training for cities, counties, and special districts virtually and in-person. CPS HR instructors are knowledgeable, experienced trainers and our courses are focused on the skills and knowledge that employees need to succeed in today's public-sector workplace.

We also provide customized training to individual agencies. Once the curriculum and learning objectives are developed, our qualified trainers provide instruction on-site or remotely for the agency's employees.

- ***Depth of training and development experience on diverse topics for public sector clients and our ability to customize our process to fit your needs.*** CPS HR has been establishing development program options for client initiatives; sourcing trainers; coaching leaders; stewarding training/development efforts; and coordinating programs for over 19 years.
- ***An excellent reputation earned by a high level of client satisfaction and our list of returning clients who seek our services for multiple engagements.*** Our client satisfaction training evaluation rating averages 4.6 on a scale of 1 - 5, with 5 being the highest.

Certified Instructors/Consultants

CPS HR's team of instructors and facilitators possess several training related certifications that are used in our training courses as appropriate. Certifications include:

- DiSC
- StrengthsFinder 2.0
- MBTI
- Elevations Career Assessment
- Strong Inventory
- Franklin Covey
- Thomas Kilmann
- Senior Professional in Human Resources
- International Coaching Federation
- Kaleidoscope Leadership Skills Inventory
- Leadership Practices Inventory (360 Assessment)
- Advanced degrees (master's Level and Ph.D.) in social science, communication, organizational development, psychology, and human resources

Subcategory: Testing and Assessment

CPS HR is a leader in the development and administration of small- and large-scale assessment projects for occupational selection. We provide a variety of assessment instruments and approaches, specializing in public sector human resource solutions. At present, CPS HR conducts job analysis studies and provides multiple choice tests, assessment centers, structured oral interviews and performance tests to public sector organizations throughout the United States and Canada. These agencies vary from city and county governments to large state and federal agencies.

*In over 35 years of
employment testing, CPS HR
has not had a successful
challenge to our selection
instruments.*

CPS HR staff members include industrial/organizational psychologists, experienced measurement specialists, and highly trained technicians and support staff. Our testing services include test research and development; test validation; test rental and scoring; test logistics and administration; statistical analysis; and the design, development, and administration of assessment centers and performance examinations.

Our tests are developed to meet the most stringent psychometric standards and are frequently updated to ensure content relevance and prevent overexposure. Our staff of testing experts provides prompt, full-service test support from initial order processing through development, scoring, item analysis, management of appeals, and follow-up consultation. CPS HR has been extremely successful in performing job analyses and developing examinations for public agencies that are congruent with the needs of Agencies.

Our staff is thoroughly familiar with the professional and regulatory standards in the testing area and has extensive experience in fair employment, the Standards for Educational and Psychological Testing (American Educational Research Association, American Psychological Association, and National Council on Measurement in Education, 1999), the Uniform Guidelines on Employee Selection Procedures (Federal Register, 1978), the Principles for the Validation and Use of Personnel Selection Procedures of the Society for Industrial and Organizational Psychology (2003), and the Guidelines and Ethical Considerations for Assessment Center Operations (rev. 2009).

Our Team of Experts

We have a uniquely qualified team of professionals who are readily available to assist NCTCOG's member agencies with the requested services. Our CPS HR Project Team will focus on maintaining open communication with Agency designated staff to ensure that this project preserves its focus, each Agency's objectives are met, and all deliverables adhere to the confirmed timeline and budget.

All services will be conducted from our Main Headquarters located at Sacramento, CA with assistance from consultants from our Project Teams that reside locally in Texas.

Service Category #1: Consulting Services*

****NOTE: This Project Team comprises members for both Service Category #1: Consulting Services and Service Category #2: Optional Ancillary Services (Subcategory: Full Compensation Package Review)***

Classification and Compensation

Project Manager

We have selected **Ellen Fishel** to serve as Project Manager and Point of Contact. The Project Manager's role will be to work directly with the Agency's Internal Project Manager to (i) ensure the Agency's study needs and goals and objectives are understood and accurately communicated to member management, other key stakeholders, and the CPS HR Project Team; (ii) conduct client meetings; (iii) be responsive to all client requests; (iv) manage the work of the CPS HR Project Team; (v) meet timeline and budget expectations; (vi) conduct quality control of deliverables; and (vii) meet/provide information/present results to the Agency.

Project Consultants

CPS HR has a uniquely qualified team of professionals to assist the Agency with its studies. Ms. Fishel will be joined by a combination of staff who will be assigned upon award: **Sarah Jansen, Ashley Jacobs, Suzanne Ansari, Michelle Garbato, and Igor Shegolev.**

In addition, under the guidance of Principal Program Coordinator **Sheila McAuliff**, our dedicated operations team, comprising Program Coordinator **Denise Moran** and Associate Human Resources Consultant **Chase Sivret**, will ensure commitment to maintaining the highest professional standards of quality. Our team, with decades of combined experience in providing evaluation and compensation studies, will harness innovative technology solutions and robust data management strategies to provide operational direction for the project, ensuring excellence. No subcontractors will be used to perform the services as outlined in the Scope of Work.

Staff Biographies

Ellen Fishel, MLHR, PHR, CLRP; Manager, Classification and Compensation

Ms. Fishel is the CPS HR Manager of Classification and Compensation. She has over 12 years of progressive experience in public sector human resources at the state and local levels. A leader and established HR professional, she has extensive experience partnering with business units to design, deliver, and implement policy-driven, innovative solutions to daily HR issues as well as large scale strategic initiatives. She has a desire to understand the client's needs and provide recommendations for improvement while working within defined parameters. She has led county and citywide initiatives regarding compensation, performance management, and benefits administration impacting over 1,500 employees and multiple bargaining units.

Certifications: Professional in Human Resources (PHR), Human Resources Certification Institute (HRCI); Certified Labor Relations Professional (CLRP), National Public Employees Labor Relations Association; Ohio Office of Collective Bargaining Academy Graduate, Ohio Department of Administrative Services

Sarah Jansen, B.B.A., Senior HR Consultant

Ms. Jansen possesses 15 years of experience, including more than 12 years as a generalist and Deputy HR Director with the County of Lake. During that time, she served as the primary classification and compensation contact for the County, including serving on the County's Classification and Compensation Committee.

Ashley Jacobs, M.B.A., Senior HR Consultant

Ms. Jacobs brings over eight years of progressive experience in public sector HR at the municipal level, as well as nearly five years of HR experience in the private sector. She has a unique combination of strengths, including education and mentorship, and organizational structure. Her goal is to transcend conventional HR practices in hopes of generating both immediate and long-term results, along with contributing to the bottom-line success of the organization. She has developed and led citywide initiatives to help retain top talent and has been responsible for managing merit projects and budgets exceeding \$15 million.

Suzanne Ansari, B.A., Senior HR Consultant

Ms. Ansari's HR experience includes classification and compensation, recruiting, training, program development, employee relations, benefits, safety and compliance. She has participated in multiple classification and compensation studies and has prepared over a thousand job descriptions. She also participates in the research of salary and benefits surveys. Ms. Ansari has completed the Merit System Training Academy and was a guest speaker on Classification and Compensation topics at the California School Personnel Commissioners Association (CSPCA) conference.

She previously worked for the Orange County Office of Education. Ms. Ansari is a member of the Society for Human Resource Management (SHRM) and has published several articles for local Orange County based newspapers.

Certifications: Merit Academy graduate-California Personnel School Commission (CSPCA), Orange County Sheriff Department Citizen's Police Academy graduate

Michelle Garbato, M.A., SPHR, Principal Consultant

Ms. Garbato brings over 12 years of progressive experience in public sector human resources at the state and local levels. A consultant and change agent, she has extensive experience partnering with clients and creating and implementing innovative solutions to attract and retain highly qualified employees. She has a talent for managing large scale projects while balancing multiple stakeholder interests and ensuring quality and compliance. She has led statewide initiatives impacting over 200 state agencies and has been responsible for upholding the merit principle for over 220,000 employees. A firm believer in professional growth through education and training, she remains active within the field and holds various human resources certifications and credentials.

Certifications: Senior Professional of Human Resources (SPHR), Certified Professional (IPMA-CP), CALPELRA Labor Relations Master (CLRM), and various HR-related certifications from the California Department of Human Resources and State Personnel Board (Selection Analyst, Recruitment & Selection, Classification & Compensation, and Workforce and Succession Planning)

Igor Shegolev, M.S., SPHR, Technical Specialist

Mr. Shegolev is a compensation and HR practitioner with extensive experience in managing HR activities and teaching graduate business courses. For 20 years, he has held executive jobs in compensation and HR management in government and the healthcare. He has worked with a broad spectrum of organizations providing advanced and effective solutions in compensation management, total rewards, and employment analytics.

Certifications: Sr. Professional of HR (SPHR), WorldatWork (U.S. Total Rewards Assc.)

Sheila McAuliff, B.S., Principal Program Coordinator

Ms. McAuliff has more than 20 years of HR experience with focus in the areas of recruitment and selection, licensure and certification, and classification and compensation. She has been the project manager for a variety of employment testing and certification programs at the state and local levels. She currently manages the operations team in the classification and compensation division with a focus on quality control, technology solutions, and data management.

Denise Moran, Program Coordinator

Ms. Moran is currently the Classification and Compensation Program Coordinator with CPS HR Consulting. She has been with CPS HR since 2007 and has over 25 years of administrative experience, 18 of which have been in the Human Resources environment. She currently assists the Classification and Compensation department with benefit data collection and project management support.

Chase Sivret, B.S., Associate Human Resources Consultant

Mr. Sivret is currently the Classification and Compensation Associate Human Resources Consultant with CPS HR Consulting. He has been with CPS HR since 2018 and has over 5 years of administrative experience. He currently assists the Classification and Compensation department conducting research, data collection and management, quality control, and analysis.

Service Category #2: Optional Ancillary Services

NOTE: This Project Team comprises members for the specific subcategories listed here for Service Category #2: Optional Ancillary Services

Subcategory: Employee Engagement

The Employee Engagement subcategory will be managed by the CPS HR *Institute for Public Sector Employee Engagement*. The Institute is devoted to helping public-sector organizations measure and improve engagement, and conduct research, to advance the state of knowledge about employee engagement, particularly in the public sector.

The Institute project team members will include Project Managers **Janelle Callahan** or **Jose Gonzalez**; and Senior Project Consultants **Judy England Joseph, Belva Martin, Dr. Don Schutt, or Lisa Bishop**. If necessary, we will also assign additional consulting and administrative support staff.

Project Managers

Janelle Callahan has her M.A. in Human Services Psychology and helped start the Institute in 2017 with Bob Lavigna. As the lead for the Institute for Public Sector Employee Engagement her primary focus is oversight for product and service development and client services delivery. Prior to joining CPS HR, she worked for the Partnership for Public Service, where she led the *Best Places to Work in the Federal Government* research. She also worked for the newspaper Education Week, and the Institute for Learning Innovation, and has more than **19 years** of experience conducting research and working with leaders to support the effectiveness of public institutions. She is a Certified Human Capital Strategist and has published several articles on employee engagement and is involved in local government and also serves as a Planning Commissioner for the City of Shoreline, Washington where she resides.

Jose Gonzalez is a dedicated public servant with over **seven years** of public service. Mr. Gonzalez has a M.P.A. with a specialization in Employee-Employer Relations from California State University, Long Beach and holds a SHRM-CP designation from the Society of Human Resource Management. Before joining CPS HR, he held several human resource positions in both municipal government and school districts where he performed recruitment, selections, and employee-employer relations, interpreted collective bargaining agreements, performed reasonable accommodations and managed leaves, and led various projects in employee engagement and employee training. He currently resides in San Diego, California.

Our Project Manager will be the main point of contact on all details. The Project Manager also serves as the expert on the survey content, process, analysis, and results reporting. Our Senior Consultants will guide leaders through the process, make recommendations for organizational improvement, and communicate with the full range of stakeholders, from employees to oversight boards. The Project Manager and Senior Consultants work together to manage the schedule of deliverables and resolve any challenges.

Project Consultants

Judy England Joseph has more than **40 years** of public-sector experience managing human resources, conducting organizational studies, leading projects, implementing change and training leaders. She served as a Senior Executive in the U.S. Government Accountability Office (GAO) and was the Director of Housing and Community Development Issues.

As Director of Research for the Partnership for Public Service, her portfolio included the Best Places to Work in the Federal Government rankings. Since 2017, she has worked with CPS HR's Institute clients providing training, coaching, and consulting services. She is based in the Washington, D.C. area.

Belva Martin has more than **40 years** of experience helping government organizations recruit, develop, and retain talent. She served as a Senior Executive and Director in the U.S. Government Accountability Office (GAO), and her portfolio included Human Capital Management, EEO, and Diversity issues. She is an International Coaching Federation certified coach and worked with over 75 executives and managers at The Brookings Institute Executive Education program. She has delivered over 200 hours in training to federal leaders and managers on topics such as building high-performing teams and resilience. She is based in the Washington, D.C. area.

Dr. Don Schutt has his Ph.D. in Education and has published several articles on career development and is also a certified expert with more than **30 years** of experience in public sector talent management in the areas of assessment, employee engagement, development, and diversity. At UW-Madison, he served as the Director of Human Resource Development where he oversaw the talent management lifecycle. He has delivered over 1,000 keynotes, courses, and workshops. He is a SHRM Senior Certified Professional, a Licensed Professional Counselor, Certified Career Services Provider through the National Career Development Association, a Board-Certified Coach, an IPMA-Certified Specialist in Organizational and Employee Development and also has a Certificate in Strategic Human Resources Management. In addition, he is a Lean/Six Sigma Green Belt and a Certified ScrumMaster. Don is based in Madison, Wisconsin.

Lisa Bishop has an MBA in Management and is an executive coach and trainer with CPS HR, with more than a **decade** of experience in non-profit, small business and corporate talent management, and expert in assessment, employee engagement, executive coaching, leadership development, strategic planning, diversity and organizational development, change management, emotional intelligence, eLearning, training and facilitation. She has worked with numerous public sector and nonprofit clients of CPS HR since 2018, and previously she was an employee engagement consultant to Kaiser Permanente leadership on its Best Place to Work initiative. In addition, she is a Member of the International Coaching Federation (ICF), an Associate Certified Coach (ICF ACC), and a Certified Organizational Development Coach (ICF ACSTH). Lisa is based in the San Francisco Bay Area.

Subcategory: Recruitment

Project Managers

CPS HR has assembled a strong project team, with each member selected for his/her specific expertise, experience working in the public sector and professionalism. **Pamela Derby** will be the Project Manager for **Executive** level recruitments and **Christina Peacock** will be the Project Manager for **Middle Management/Specialized** level recruitments. They will serve as the main point of contacts for the Agency coordinating all aspects of each project including the project staff, finalizing project plans and deliverables, organizing and securing resources, managing communications, monitoring project progress, resolving any problems, and ensuring timely and successful completion of the engagement.

The actual Project Manager/Recruiter will be assigned as recruitment requests come in.

Project Consultants

CPS HR has a uniquely qualified team of professionals to assist the Agency with recruitments.

For **Executive Recruitment**, Ms. Derby will be joined by our team of professionals which comprise *Kylie Wilson, Senior Executive Recruiter; Abby Ackers, Senior Executive Recruiter; Joanne Peterson, Executive Recruiter; David Niemeyer, Executive Recruiter; Al Bonnenfant, Executive Recruiter; Shawn Garcia, Executive Recruiter; Fatima Nukic, Associate Executive Recruiter; and Rachael Danke, Associate Executive Recruiter.*

For **Middle Management/Specialized Recruitment**, Ms. Peacock will be joined by our team of professionals which comprise *Lisa Conner, Principal HR Consultant; Debbie Gutman, Principal HR Consultant; Edward Sisson, Senior HR Consultant; Laura Lee, Senior HR Consultant; Heather Moore, Senior HR Consultant; and Kristin Holden, Senior HR Consultant.*

Our team of professionals have decades of combined experience in providing recruitment and selection services. We are committed to meeting the highest professional standards of quality. Each of the team members has broad and deep experience in public sector and are readily available to assist the Agency with this project.

Our recruiters typically carry a load of eight to ten recruitments that are managed to kick-off in a staggered fashion. This allows recruiters to devote the time necessary to attract highly qualified and diverse candidate pools while being fully responsive to our clients' needs. Work is assigned based on caseload and possible subject matter expertise.

We are committed to providing each of our clients the same level of service excellence, and we take great care not to take on more work than this commitment allows. **We will not utilize subcontractors for these services.**

Staff Biographies

Pamela H. Derby, Manager, Executive Recruitment

Since joining CPS HR Consulting in 2003, Ms. Derby has conducted a wide range of recruitments for county, city, special district and association executives including city attorney, executive director, general manager, city manager, assistant and deputy city manager, police chief, community and economic development director, human resource director, finance director, city administrator, registrar of voters, library director, and director of information technology in addition to specialized support positions.

Prior to joining CPS HR, Ms. Derby served as the Aide to the Yuba County Board of Supervisors serving as the Board's liaison to County Department Heads, the community, and the media. This experience provided her with a unique perspective into the special circumstances that exist in a Board/Council-Manager relationship and a keen awareness of the inner workings of local government. She is sensitive to balance the wants of the community with the needs of the client so as to tailor a recruitment process that reaches out to the most appropriate candidates and ensures a diverse group of individuals from which to make a selection. She has successfully employed these techniques in jurisdictions ranging from under 10,000 to 10 million. Moreover, she employs a firmly-held personal philosophy that candidates must be treated with the same respect and careful consideration as her client.

Prior to her local government service, Ms. Derby served in the private sector and with several non-profit lobbying associations. She was responsible for the management of several large consumer groups.

Kylie Wilson, M.B.A, Principal HR Consultant (Based in Texas)

Ms. Wilson has over 25 years of professional and management experience in the public sector. Ms. Wilson has worked directly with local government organizations and associations, predominately human resources personnel, city management, parks and recreation, project management, employee development, executive recruitment, strategic planning, and other client needs.

Ms. Wilson has conducted numerous executive recruitments for all types of organizations for General Manager/City Management, Chief Information Officers, Chief Financial Officers, City Auditors, City Clerks, Directors for various departments, along with numerous other manager level positions.

She has worked in several impactful management roles for municipal government entities in Texas to include the City of Baytown, the City of Missouri City, the City of Georgetown, and the City of League City. She also previously worked for Strategic Government Resources (SGR) overseeing member relations, leadership conferences, job board vacancies, live training and workshops, and online learning management system (LMS) opportunities.

She has a passion for public service and a strong skill set for being mission driven and results oriented, while always maintaining an optimistic and engaging demeanor. Ms. Wilson also provided management and oversight to key programs, projects and processes by evaluating City operations and making recommendations to improve operational implementation of a strategic plan, to include short-term and long-term goals and objectives, for City operations, and identifying opportunities for improving methods and procedures.

Abby Ackers, Senior Executive Recruiter (Based in Texas)

As a senior executive recruiter and talent acquisition consultant with over 15 years of professional management experience, Ms. Ackers has a passion and a track record for connecting talented public service professionals with exciting and rewarding leadership opportunities. The majority of her executive search experience is dedicated to the public sector, placing steadfast government leaders in municipalities, counties, metro districts, and supporting agencies across the United States. In doing so, she firmly believes that recruiting and retaining top talent for public service positions positively contributes to the long-term success of the organization and the community it serves.

With a background in sales and marketing, hospitality, and executive search, she's well-equipped with solid skills in project management, strategic planning, negotiation, communication, relationship building, and problem-solving. Most recently, in addition to being the Managing Member of her own talent acquisition consulting business, she was the Vice President of Executive Search at her previous organization, responsible for overseeing the recruiting team and completion of recruitment projects, ranging from City Managers and C-Suite positions to Department Directors, Assistant Directors, and Managers. She specializes in full-cycle recruitments and works with her clients through the recruiting process to develop creative, client-specific strategies, processes, and best practices for talent acquisition and retention, including ways to reduce instinctual biases and overcome recruiting challenges in an ever-changing employee-employer market. She appreciates working with diverse and dynamic teams and candidates who share the same vision and values of serving the public interest and improving organizational performance.

Joanne Peterson, M.P.A., PHR, Executive Recruiter

Ms. Peterson is a proven visionary and leader in supporting and sustaining a healthy workplace culture. She has over 25 years of direct experience in the public sector. She has worked with local government organizations and associations, predominately in human resource management, County management, and metropolitan transportation authority among others.

Prior to joining CPS HR Consulting, she served as the Chief Human Capital & Development Officer for the Los Angeles County Metropolitan Transportation Authority. In this role, she served as department chief leading a staff of HR professionals that is comprised of eight operating units, including Talent Acquisition (recruitment, selection hiring, compensation & classification and employee on-boarding), Strategic Workforce Planning (short/long term workforce projects, succession planning, and veteran outreach), Employee Relations and Talent Development (employee readiness and employee advancement), Labor Relations, Pension and Benefits and General Services. She has built world-class workforce programs with a focus on change management, leadership development and strategic planning. The hallmark of her career has been to develop our future leaders while building strategic workforce plans.

David J. Niemeyer, M.P.A., Executive Recruiter

Mr. Niemeyer brings 38 years of local government management experience including managing 7 communities in the suburban Chicago area. He brings an extensive practitioner's experience in government services to the CPS HR Executive Recruitment team through his roles as Village Manager, City Manager, Village Administrator, and City Administrator/Assistant to the Mayor all in the state of Illinois. Human resources and senior executive recruitment are areas that he excels in and thoroughly enjoys.

Mr. Niemeyer led recruitments for over 15 department head vacancies as well as numerous other management positions. This included preparing recruitment profiles and brochures, screening candidates and creating a list of top candidates for the elected officials, developing interview questions, managing assessment centers, conducting background checks, and negotiating employment offers. His most recent large recruitment was for the police chief of Tinley Park which included a day long assessment center.

He has a reputation as an ethical, engaged, collaborative leader, who has excellent communication and listening skills. He has a calm, focused disposition and has worked with vocal and diverse elected boards and residents to develop a consensus on controversial issues.

Additionally, he has worked in a variety of different communities in terms of wealth, demographic, political stability, culture and differing goals. A candidate that is successful in one community may not be successful in other, and so it is important that a recruiter understands the importance of candidate fit in an organization. Mr. Niemeyer's experience in diverse communities will help in screening candidates that are a good match for an organization.

Al Bonnenfant, M.A., SPHR, Executive Recruiter

Mr. Bonnenfant is a highly accomplished human resources professional with a diverse blend of management and human resources experience spanning over 30 years. His core expertise is in human resources, business development, industrial engineering and operations. Throughout his career, he has demonstrated success as a progressive partner in executing collaborative solutions, inspiring cultural change, and focusing on organizational effectiveness.

A hallmark of his style is being a coalition-builder and business partner focused on the interaction between sincere relationships and the achievement of organization, employee and client goals and objectives. He has worked in almost all areas of HR, but most notably, recruiting, onboarding, succession planning, leadership development, employee relations, safety and compliance, and workers' compensation. He has applied both private and public sector experience in his roles as a Business Manager, Human Resources Business Partner, and Human Resources Director.

Shawn Garcia, Executive Recruiter

Ms. Garcia has over 20 years of professional experience in the public sector including Human Resources, recruitment, leaves of absence, workers compensation, benefits oversight, policy development and implementation, and administrative operations. She is a strong leader with excellent communication, project management, and interpersonal skills.

During her 21 years at First 5 Contra Costa, she managed the human resources department for a staff of 30+ including employee relations, recruitment and staffing, position classification, compensation, staff training and development, benefit oversight, performance evaluations, employee leaves, employee safety, and executive level recruitment.

Fatima Nukic, Associate Executive Recruiter

Ms. Nukic has over ten years of professional experience in the public sector. She has assistant on a wide range of recruitments for county, city, special district, and association executives including executive director, city attorney, police chief, human resources director, finance director, health and human services director, risk manager, environmental resources director, to name a few. Ms. Nukic is an action-oriented and results-driven leader who thrives on finding new ways to promote recruitments and finding ideal candidates. She brings an extensive background in promoting, sourcing, and social media marketing to her role as an Associate Executive Recruiter at CPS HR Consulting.

Rachael Danke, M.S., Associate Executive Recruiter

Ms. Danke has spent her entire career in the non-profit and public sectors. With over seven years of experience in Human Resources, and a Master's Degree in Human Resources. She has assisted multiple agencies throughout the nation with their talent attraction and retention needs, along with benefits, policy analysis, and strategy. She has experience recruiting for roles such as Chief of Police, Director of Public Works, Director of Human Resources, Executive Director, and other executive roles at the local, state, and special districts level. Before CPS HR Consulting, she was an HRBP for multiple county departments supporting their recruitment and hiring needs. She continues to attract new talent to the public sector using innovative techniques such as Virtual Career Fairs and talent engagement to ensure the next generation of leaders for tomorrow.

Christina Batorski Peacock, M.P.A., PHR

Ms. Peacock has 20 years of professional and management experience in public sector Human Resources, including experience in the areas of employee recruitment and selection, compliance, labor relations, test administration, employee relations, and policy development. Specifically, Ms. Peacock worked directly on recruitment efforts for entry-level Police Officer and entry-level Firefighter as well as sworn and uniform promotional recruitments with the City of Chicago for over 10 years.

Debbie Gutman, M.A.

Ms. Gutman has over 20 years of comprehensive experience in Human Resources, including both public and private sector. She has a knowledge and understanding of federal and state labor laws, full-cycle recruiting, employee relations, compensation, training, budget administration, and policy development.

Lisa Conner, M.A., SHRM-SCP

Ms. Conner has over 20 years of professional governmental human resources experience, performing recruitment and selection activities, classification studies, audits of County personnel systems against Federal and State merit principles, employee investigations, training, and employer/employee relations responsibilities.

Laura Lee, M.A., PHR

Ms. Lee is a human resources professional with over 10 years of experience in the public sector. She has a wide range of HR expertise in a variety of responsibilities, including, but not limited to full-cycle recruiting, test administration, classification and compensation, employee and labor relations, and performance management.

Edward Sisson, SHRM-SCP, SPHR, CEBS

Mr. Sisson who will serve as the Primary Consultant has more than 22 years of experience as an accomplished, strategic, and results-oriented Human Resources professional with a broad range of experience in Human Resources management including recruitment and selection, labor relations and complaint resolution, program development and implementation, employee engagement, training and development, wellness, benefit and payroll administration, classification and compensation analysis, performance management, and budgeting.

Heather L. Moore, PHR, IPMA-CP

Ms. Moore has over 18 years of experience in Human Resources in both the private sector and public sector arenas. Her experience includes full cycle recruiting, onboarding and off boarding, leave of absence administration, unemployment processing, data entry for personnel and payroll processes, and employee relations. Ms. Moore also has experience in benefits administration, payroll processing and Workers' Compensation. She has worked in an HR Generalist and various support roles and is adaptable to numerous situations; picking up tasks quickly. Ms. Moore's specialty areas include employee relations, FMLA/ADA administration, data entry, employee training, and new hire orientations.

Kristin Holden, M.B.A.

Ms. Holden has 19 years of professional experience in public and private sector human resources, including executive search and recruitment, classification and compensation, organizational reviews, record management, and training.

Subcategory: Training

Project Manager

We have selected **Karen Evans** to be the Project Manager for training services because of the strong project management skills and depth of experience with work of this nature that she possesses. She will serve as the main point of contact for the Agency coordinating all aspects of the project including the project staff, finalizing project plans and deliverables, organizing and securing resources, managing communications, monitoring project progress, resolving any problems, and ensure timely and successful completion of the engagement.

Project Consultants

Ms. Evans will be joined by instructors **Mark Stephens (Texas), Mackenzie Bates (Texas), Cherylan Campbell (Texas), Janet Lockhart-Jones, Baljit Hundal, Michael Grabow, Allison Horak, and Yolanda Underwood.**

Staff Biographies

Karen Evans, Ph.D., Training and Development Manager

Dr. Evans is the Training and Development Manager for CPS HR Consulting. She has more than 25 years of experience in education as an administrator and instructor. She has in-depth experience in executive level management, operations and sustainability for multi-modal delivery (online, blended, social, and mobile), curriculum and program development and deployment, assessment of student learning outcomes, faculty development, project management, strategic planning, organizational change and change management, conflict resolution, budgeting and forecasting, contract negotiation, accreditation, and compliance.

Mark Stephens, J.D. (Texas)

Mr. Stephens is an HR Professional with a strong legal background who works with organizations of every size. He offers training programs to create a powerful, productive, and safe work environment so every employee may reach their full potential and value. He believes that practical, interactive, and informative training programs allow each participant to discover lessons that they may take back to the workplace and use immediately. With over 18 years of training design, development and facilitation experience, he seeks to create a training environment that meets the needs of each participant. He has worked as the Human Resources Compliance Specialist within municipalities and facilitated all the City's compliance training. Using a variety of real-life legal scenarios and first-hand human resources experiences, he worked with a team that built training programs based on respect, dignity, trust, and discovery.

He developed and facilitated training for companies ranging from PepsiCo to the FDIC Office in Chicago on how to comply with their local, state, and federal laws to understand how to limit liability and create a work environment that puts its people first. He is a certified trainer that has facilitated workshops throughout the United States focusing on leadership development, interpersonal communication, diversity in the workforce, time, and change management as well as supervisory training affecting every aspect of the employment relationship.

He earned a J.D. from Baylor University Law School and a B.A. in Communications from Baylor University. Over a diversified and exciting career, he has worked as an Assistant District Attorney, the General Counsel/Editor-in-Chief of a publishing company, owns his own learning and development company, established a wide-ranging law practice, and managed the training and development program for a major national nonprofit organization.

Mackenzie Bates, M.S. (Texas)

Ms. Bates is a skilled instructor with six years of experience teaching/tutoring collegiate communication and writing. She earned a Master of Science degree in Health & Strategic Communication from Chapman University.

Cherylann Occhipinti Campbell, PHR, SHRM-CP (Texas)

Ms. Campbell has been a Principal of an Austin, TX based Human Resources consulting firm since 2012. She has been a practicing HR professional for more than 25 years. She has experience across a variety of industries such as small businesses, governmental agencies, utilities, construction, environmental, water, banking, finance, federal contractors and family-owned companies. She provides practical solutions so businesses can handle HR challenges while motivating and engaging their workforces.

Ms. Campbell's areas of expertise include HR processes and compliance, leadership/supervisory development, succession planning, performance management, customer service, training, employee relations, blended learning, coaching, team building, and facilitation. She also has developed special interests serving mission-based organizations (e.g. non-profits, quasi/governmental agencies, school districts). She earned her Bachelor's degree from Canisius College of Western New York with a focus on Industrial/Organizational Psychology. Since 2000, she has been certified as a Professional in Human Resources (PHR) through the National Society of Human Resources Management and is a formally trained mediator/facilitator by the Dispute Resolution Center. She has participated in many regional community service endeavors such as an Executive Board member for Big Brothers Big Sisters of Central TX and Tri-Chair for the AISD Facility & Bond Planning Advisory Committee.

Janet Lockhart-Jones, Ed.D.

Ms. Lockhart-Jones is a learning leader, master instructor/facilitator and organizational change manager. She has extensive experience in implementing and overseeing the development and rollout of corporate executive education, leadership development, and organizational change initiatives. She is a Masterclass facilitator with course curriculum development and instruction in both traditional corporate classroom and virtual environments and academia.

She is adept at providing workshop and training facilitation on Communication Skills, Presentation Skills, Unconscious Bias, Driving and Influencing Change, Leadership, Influence, Building Effective Teams, Virtual Facilitation Mastery, Productive Work, Respect in the Workplace, and others. She earned her Doctor of Education degree from the University of San Francisco and a Master of Science from Golden Gate University.

Baljit Hundal, MSW, MACP

Baljit Hundal is a methodical Senior Executive with over 15 years of comprehensive management experience overseeing daily operations of public and private health and human service programs. Versatile professional well-versed in executing business strategies, preparing and implementing business plans and overseeing financial performance with the community needs and clients' issues in mind. Education includes a Master of Social Work, California State University, Sacramento; Master of Counseling Psychology, National University, Sacramento; and a Bachelor of Social Work, California State University, Sacramento.

Michael Grabow, B.A.

In addition to his work with CPS HR Consulting, Mr. Grabow is owner and founder of The Essential Link Business Coaching and Training Network. Mr. Grabow has over 28 years of experience in human resource development and management with global organizations. His passion is to see the human potential within organizations realized, released, and renewed. He works with a number of state and local government agencies and departments including CA Department of Corrections and Rehabilitation, City of Sacramento, Sacramento Housing and Redevelopment Agency (SHRA), County of Fresno, CA Special Districts Association (CSDA), CA Department of Transportation, and CA Department of Motor Vehicles, among many others.

He possesses a B.A. in Human Relations, Human Resource Management from Golden Gate University and is a certified instructor with Ken Blanchard Companies and Franklin/Covey. He is also a certified Business Coach with businesscoach.com and an instructor for CSU Sacramento.

Allison Horak, J.D.

Ms. Horak is an independent training consultant with over ten years of experience. While working as in-house counsel for an Oregon corporation, she handled litigation matters, as well as training and educating corporate members on various legal issues. She has also been a solo practitioner, managing various transactional, litigation, and probate matters for clients. She conducts training on a range of business topics, including business writing and grammar, presentation skills, critical thinking, time management, conflict resolution, customer service, supervisory skills, building trust, and workload and workplace management.

She works with a number of California state and local government agencies and departments including Los Rios Community College District, California State University, Sacramento, CA Department of Human Resources, San Joaquin County, CA Department of Transportation, CA Department of Motor Vehicles, California State Teachers' Retirement System, CA Department of General Services, California Lottery, California Department of Developmental Services, California Department of Fish and Wildlife, California Veterans' Home, California Department of Managed Healthcare, Texas Comptroller's Office of Public Accounts, CA Department of Corrections and Rehabilitation, City of Sacramento, Moulton Niguel Water District, City of Menifee, County of Orange, and Inland Empire Utilities Agency, among many others.

She possesses a J.D. from the Northwestern School of Law, Lewis & Clark College, Portland, Oregon and a B.A. in Communications from the University of California, San Diego, Warren College, La Jolla, California. She is affiliated with the Association for Talent Development (formerly ASTD); the Sacramento Area Human Resource Association (SAHRA); and is a member of the California and Oregon State Bars.

Yolanda Underwood, B.A.

Ms. Underwood is a fully versed leadership trainer and coach that helps organizations achieve results. For over 20 years, she has specialized in providing teams with training and coaching sessions that are powerful and thought-provoking. Focusing on the areas of strategic planning, performance management, and leadership development, she is able to assist organizations to realize their goals. She works with departments and cross-functional teams as well as individuals at all levels. Her passion for helping leaders be their best is apparent in each session, through her energetic style that creates engagement and interest.

Her expertise in areas such as Effective Communication, Building Trust, Developing High Emotional Intelligence, and Creating High-Performance Teams focus on promoting a positive and productive culture. In addition, her vast experience in the area of performance management helps organizations focus on goal setting and staying the course to achieve those goals. She has built Performance Management systems from the ground up, as well as helped leaders support those already in place.

She has worked with a number of public sector agencies including Yuba County, Sutter County, Yolo County, Elk Grove Water District, Fresno County and the California District Attorneys Association, among others. She possesses a B.A. in Economics and a B.A. in Political Science from the University of California, Berkeley. She is fluent in Spanish and has experience working to bridge the communication gap with those who understand Spanish more accurately.

Subcategory: Testing and Assessment

Project Manager

For Testing and Assessment services, **Amy Bigone** will service as Project Manager. She will be the main point of contact for the Agency coordinating all aspects of the project including the project staff, finalizing project plans and deliverables, organizing and securing resources, managing communications, monitoring project progress, resolving any problems, and ensure timely and successful completion of the engagement.

Project Consultants

Ms. Bigone will be assisted by Project Consultants **Matthew Christoffersen, M.S., Holly Hatada, M.A., Breana Lopez, B.A., and Ryan Platt, M.S.** Our team members are seasoned testing and assessment professionals. No Subcontractors will be utilized for this engagement. Additional professional and technical staff may also be involved, as needed for administrative support, as we commit our entire organization's resources to meeting the needs of the Agency.

Staff Biographies

Amy Bigone, MBA, SPHR

Ms. Bigone is experienced in the design, development, and administration of selection processes for public agencies, along with having expertise in job analysis and test development. She develops customized selection instruments and written exams, candidate orientation materials, scoring criteria, and rater training materials. She writes technical reports documenting and validating work performed. Ms. Bigone manages and oversees project budgets, including expenses and project costs, and ensures all project timelines and deliverables are achieved. Currently, Ms. Bigone manages the Test Development and Assessment Division of CPS HR Consulting.

Matthew Christoffersen, M.S.

Mr. Christoffersen is a Senior Consultant with CPS HR Consulting and specializes in custom assessment development, assessment administration, and facilitation of assessment scoring. Before joining CPS HR, he spent several years as an internal consultant within a county government agency in Orlando, Florida. There he provided consultation to HR staff and hiring authorities regarding recruitment and selection strategy, as well as developing custom, job-specific assessment tools for selection and promotion. He has worked with a wide variety of job classifications within government departments including Law Enforcement, Fire Rescue, Corrections, Public Works, Utilities, Human Resources, and more.

Holly C. Hatada, M.A.

Ms. Hatada is a Principal Consultant with CPS HR Consulting and possesses more than 15 years of experience delivering Human Resources services, including: employee recruitment and selection; employment, licensure, and certification testing, analysis and validation; employee training and development; supervision, coordination, and leadership of high performing teams; management of large testing and examination projects; human resources consulting and auditing; Equal Employment Opportunity (EEO); and other HR related areas.

Breana Lopez, B.A.

Ms. Lopez possesses over 14 years of experience in recruitment and selection and spent a significant amount of time with the City of Anaheim responsible for the design, development, and evaluation of City-wide employee development and training programs. She also served as the Public Safety Recruitment Specialist planning and coordinating all selection and recruitment activities for both sworn and civilian personnel, ensuring decisions were made in accordance with merit system principles and in compliance with laws, regulations, rules, and bargaining agreements. Ms. Lopez is qualified in the design, development, and administration of assessment center processes for public safety promotional opportunities, along with having experience in test development and assessment center logistics. She develops customized assessment exercises, candidate orientation materials, assessor scoring criteria, training materials, and all other work associated with assessment centers. She conducts candidate orientations and training sessions for assessors.

Ryan Platt, M.S.

Mr. Platt is a Senior Consultant with CPS HR Consulting. He has more than 14 years of technical experience in job analyses, test development, and pass point setting. Mr. Platt has previous experience with State business having worked for the California Department of Human Resources and State Personnel Board.

Additional Resources

In our commitment to delivering unparalleled services under this contract, CPS HR plans to deploy a blend of dedicated resources, ensuring the highest quality and efficiency in every aspect of our work. A key component of our resource strategy includes the engagement of specialized project consultants who work with us on a contractual basis.

Our project consultants are not just external contributors; they are integral parts of our extended team, selected for their specific expertise and proven track record in classification and compensation services. By incorporating these professionals into our project framework, we can bring a diverse range of insights, innovative approaches, specialized skills, and local resources that are crucial for the dynamic needs of any project.

Our project consultants are carefully chosen based on stringent criteria, including relevant experience, technical proficiency, and alignment with our values and commitment to excellence. This approach allows us to dynamically scale our resource allocation, ensuring that we can efficiently address the varying complexities and specific requirements of the contract.

Furthermore, our firm ensures that these consultants are seamlessly integrated into our project teams, fostering a cohesive and collaborative working environment. This guarantees that our clients benefit from a blend of our core team's deep knowledge and the fresh, specialized perspectives brought by our project consultants.

Availability and Capability of Staff

The designated project teams are available to discuss how to integrate project assignments into existing workload. Each project is treated with equal importance, regardless of the size or type of scope. We are committed to providing each of our clients the same level of service excellence, and we take great care not to take on more work than this commitment allows. Our work assignments are provided to our consultants to ensure balance.

We pledge our commitment to perform this work in an efficient and timely manner for any and all of the services we present in the Scope of Services section of this proposal. Additional project team members will be available to provide remote support based on their area of expertise relevant to the needs of the Agency.

Distinguishing Characteristics

Extensive Public Sector Expertise: We have a profound depth of experience working exclusively with public agencies and non-profit organizations. CPS HR is a joint powers authority, and as such, our charter mandates that **we provide services exclusively to public agencies and non-profits**. Over the years, we have conducted numerous classification and compensation studies for a wide array of public agencies.

Highly Qualified Staff: Our dedicated team members bring a wealth of knowledge, having worked in both public and private sectors in classification and compensation. They are known for their meticulous approach to tasks, active listening to our clients' needs, and hold advanced education and certifications.

Cutting-Edge Technology: At CPS HR, we utilize the power of our proprietary web-based tool, the Comp Calculator, for efficient management and analysis of compensation survey data. This innovative platform allows for agency-specific data entry and generates individual datasheets in Excel for each surveyed classification. Moreover, we facilitate secure and seamless collaboration through shared documents with our clients via Microsoft Teams™.

Tailored Services: CPS HR is committed to delivering top-quality classification and compensation services tailored to the unique objectives of each client's study.

Open and Transparent Communication: Throughout the project, the CPS HR Project Team is dedicated to maintaining open channels of communication with our client's staff. This commitment ensures that the project remains on track, adheres to the established timeline, and remains within budget constraints.

Use of Best Practices

We differentiate ourselves by offering best-practice expertise that emphasizes an integrated, systems-oriented approach to human resources. Our consultants recognize that the various facets of human resources, including classification and compensation, function cohesively to nurture an optimal HR system.

In providing HR services and consulting, our commitment to excellence is underscored by our unwavering dedication to implementing industry-leading best practices. We recognize that the landscape of human resources is dynamic and evolving. Therefore, our goal is to stay at the forefront of innovation, ensuring that our clients benefit from cutting-edge strategies and methodologies.

Our approach is founded on the integration of proven best practices, tailored to meet the unique needs of each client. By leveraging industry standards and staying abreast of emerging trends, we guarantee a comprehensive and forward-thinking HR solution. This commitment is reflected in every facet of our services.

Furthermore, our team comprises seasoned HR professionals with a keen understanding of the ever-changing regulatory and compliance landscape. This ensures that our clients not only receive best-in-class services but also remain fully compliant with relevant laws. Our proactive and strategic approach empowers clients to navigate the complexities of human resources with confidence, positioning them for sustained success.

Tab B - Demonstrated Past Success

Similar Clients

Our consulting firm has a rich history of providing expert services to Councils of Governments (COGs), underscoring our deep understanding of the unique challenges and opportunities these entities face. Our experience with COGs spans various regions and scales, allowing us to cultivate a nuanced approach that respects the diverse needs of these organizations. We have successfully guided COGs through intricate projects and leveraging our expertise in areas such as classification and compensation studies, recruitment, and organizational development. Our team is adept at navigating the multi-jurisdictional landscape in which COGs operate, ensuring that our solutions not only address immediate needs but also foster long-term regional cooperation and growth.

Following is a partial list of clients that are similar to NCTCOG's member agencies, for which we have conducted similar services.

Classification and Compensation Services

(Partial Five-Year Client Listing)

- California Department of Food and Agriculture
- California Department of Industrial Relations
- California High-Speed Rail Authority
- California Infrastructure and Economic Dev. Bank
- California Office of the State Public Defender
- California Public Utilities Commission
- California State Controller's Office
- California State Lands Commission
- CalOptima
- Chaffey College (CA)
- City of Carlsbad (CA)
- City of Carpinteria (CA)
- City of Chicago (IL)
- City of Glendora (CA)
- City of Long Beach (CA)
- City of Menlo Park (CA)
- City of Newport Beach (CA)
- City of Palm Desert (CA)
- Fresno Unified School District (CA)
- Imperial Irrigation District (CA)
- Inland Empire Utilities Agency (CA)
- Jefferson Union High School District (CA)
- Long Beach Water Department (CA)
- Mariposa County USD/Mariposa COE (CA)
- McKinleyville Community Services District (CA)
- Mendocino County (CA)
- Montgomery County (MD)
- Morgan County (CO)
- North County Transit District (CA)
- Northern California Power Agency (CA)
- Ojai Valley Sanitary District (CA)
- Orange County Fire Authority (CA)
- Otero County (CO)
- Paradise Irrigation District (CA)
- Paratransit (CA)
- Port of Long Beach (CA)

- City of Plano (TX)
- City of Rancho Cucamonga (CA)
- City of San Luis (AZ)
- City of San Mateo (CA)
- City of Santa Cruz (CA)
- City of Santa Monica (CA)
- City of Sheridan (CO)
- City of Temecula (CA)
- Colorado River Fire Rescue
- County of Calaveras (CA)
- County of Montgomery (MD)
- County of Park (CO)
- County of Sonoma (CA)
- Covered California
- Cucamonga Valley Water District (CA)
- Eagle River Water & Sanitation District (CO)
- El Dorado County Office of Education (CA)
- Folsom Cordova Unified School District (CA)
- Fort Collins – Loveland Water District & South Fort Collins Sanitation District (CO)
- Prince George's County (MD)
- Redlands Unified School District (CA)
- Reef-Sunset Unified School District (CA)
- San Diego Association of Governments (CA)
- Santa Clarita Valley Water District (CA)
- Schools Excess Liability Fund (CA)
- Seattle City Light Department (WA)
- Sequoia Union High School District (CA)
- Southwestern Power Administration (GA)
- Superior Court of California - Tulare County (CA)
- Superior Court of California, County of Sacramento
- Town of Eaton (CO)
- Tulare County (CA)
- Vail Recreation District (CO)
- Ventura County Transportation Commission (CA)
- WAPA (CSO) US DOE/Western Area Power (CO)
- West Valley Water District (CA)
- Williams S. Hart Union High School District (CA)

Recent Recruitments for Texas Agencies

Agency	Title	Year Completed
City of Lockhart	Director of Finance	Current
City of Victoria	Director of Parks & Recreation	Current
City of Fort Worth	Talent Acquisition Manager	Current
Travis County	Park Land Resource Manager	Current
Galveston County	Facilities Director	2023
Travis County	Human Resources Management Director	2023
City of New Braunfels	Director of Parks & Recreation	2023
City of Fort Worth	Government Contracts Administrator	2023
City of Missouri City	Chief Financial Officer	2023
City of Missouri City	Director of Neighborhood Services	2023

Agency	Title	Year Completed
North Texas Municipal Water District	General Counsel	2023
City of Iowa Colony	City Attorney	2023
City of Fort Worth	Assistant Director of HR	2023
Travis County	Engineer/Sr. Engineer - Traffic	2023
Travis County	Engineer – Development Services	2023
City of Baytown	City Manager	2023

Relevant Services Contracts

Service Category #1: Consulting Services*

***NOTE: These Contracts include both Service Category #1: Consulting Services and Service Category #2: Optional Ancillary Services (Subcategory: Full Compensation Package Review)**

San Diego Association of Governments. CPS HR began working with SANDAG in 2017 with an organization-wide classification study to update classification specifications. Subsequently, we have provided compensation consulting services to the organization on a nearly yearly basis, including market studies, development of salary recommendations, and the complete overhaul of their compensation practices and policies.

City of Chicago. While our relationship with the City of Chicago started in 2010 with the administration of public safety written exams, the collaboration expanded in 2022 with classification and compensation projects for the City's non-represented classifications. CPS HR has conducted various market studies and is in the final stages of the classification study.

Santa Clarita Valley Water Agency (District). We began working with this District in 2018 to provide an organization-wide classification and compensation study, involving the update of the classification structure, classification specifications, and a market study. Since then, the District has engaged CPS HR to provide smaller classification and compensation projects on an ongoing basis.

County of Sacramento. The partnership with the County has spanned decades, as they are a member of our Board of Directors. Through ongoing services agreements, we have provided classification and compensation studies of all sizes for various County departments.

Covered California. CPS HR has provided a variety of services for this State of California agency, and we began a total cash compensation study in 2023 for their executive classifications. Data gathering and analysis involved a complex set of parameters, and reporting is in its final stages.

Service Category #2: Optional Ancillary Services

Subcategory: Employee Engagement

City of San Antonio. CPS HR's Institute began working with the City of San Antonio in 2018 by designing and administering a city-wide employee engagement survey. In 2019, we designed and administered a pulse survey to gauge employee perceptions of actions taken on the first survey. We were selected for another contract and conducted a full engagement survey in 2023, and we are contracted with the City for two additional surveys in 2025 and 2027. Following the 2023 survey, the Institute's Senior Consultant Don Schutt met with each department leader to discuss their results and develop a customized recommendations report. City leadership asked department heads to review their survey results and identify any resources needed for action before the annual budget process.

City of Houston. In 2023, CPS HR's Institute began working with the City of Houston, designing and conducting the first-ever city-wide employee engagement survey. City leadership hosted a two-day conference in November 2023 to release the results and develop action plans. CPS HR's Institute participated in this conference to support the City's Organizational Development team and HR Business Partners as they help leaders review results and decide on actions. Similar to our work with the City of San Antonio, we will be meeting with department leadership teams in February 2024 to discuss results and provide customized action plan recommendations reports. We had originally planned for 25 department reports, but then the City decided to add more than 100 division-level reports as well. We also originally planned for only one key driver analysis for the city overall, but department leaders found them so helpful that they requested their own key driver analyses.

Dallas Area Rapid Transit. CPS HR's Institute developed and administered surveys for Dallas Area Rapid Transit (DART) in 2018, 2021, and 2023. DART leadership uses the engagement survey results to inform decisions and achieve the Board's Strategic Priority 5 to "Pursue excellence through employee engagement, development, and well-being" (FY21 Business Plan). DART also created an Employee Communication and Engagement Committee in response to the survey results with employees from across DART.

Texas Municipal Retirement System. CPS HR's Institute designed and conducted surveys 2017, 2018, and 2022. The Institute also conducted employee focus groups for TMRS in 2017. Employee engagement is a key strategic priority for TMRS to "transform the TMRS culture to one of innovation, collaboration, and open communication" (TMRS Strategic Plan 2018-2022).

City of Norfolk, VA. CPS HR's Institute provides employee engagement services for the City of Norfolk, the third-largest city in the state of Virginia. The Institute designed and administered surveys in 2021 and 2023. The Institute also conducted employee focus groups in 2022. Currently, Senior Consultant Judy England-Joseph is supporting department leaders as they develop action plans. As noted in the Team Norfolk Values, leaders are responsible for empowering people to make decisions, and a key component of that is employee engagement.

Subcategory: Recruitment

City of Fort Worth, TX. CPS HR conducted both full and partial recruitment processes that involved key stakeholder meetings, development of a marketing brochure, placement of paid advertising, in-depth outreach, research to find high caliber (active and passive) candidates, resume review, screening interviews of top tier candidates, facilitation of both virtual and in-person interviews for semi-finalists and finalists, salary negotiations, as well as reference and background checks. The recruitments conducted include *Talent Acquisition Manager (Current)*, *Environmental Services Manager (Current)*, *Government Contracts Administrator (2023)*, *City Auditor (2022)* and *Assistant Director of Human Resources (2022)*.

City of League City, TX. From 2020 to 2022, CPS HR conducted full recruitment processes that involved key stakeholder meetings, development of a marketing brochure, placement of paid advertising, in-depth outreach, research to find high caliber (active and passive) candidates, resume review, screening interviews of top tier candidates, facilitation of both virtual and in-person interviews for semi-finalists and finalists, salary negotiations, as well as reference and background checks. The recruitments conducted include *Director of Finance (2021)*, *Fire Chief (2021)*, *Director of Human Resources & Civil Service (2021)*, *Assistant Director of Project Management (2021)*, and *City Auditor (2020)*.

North Texas Municipal Water District, TX. CPS HR conducted a full recruitment process that involved key stakeholder meetings, development of a marketing brochure, placement of paid advertising, in-depth outreach, research to find high caliber (active and passive) candidates, resume review, screening interviews of top tier candidates, facilitation of both virtual and in-person interviews for semi-finalists and finalists, salary negotiations, as well as reference and background checks. The recruitment conducted was for a *General Counsel (2023)*.

County of Travis, TX. CPS HR conducted full, partial and outreach only recruitment processes that involved key stakeholder meetings, development of a marketing brochure, placement of paid advertising, in-depth outreach, research to find high caliber (active and passive) candidates, resume review, screening interviews of top tier candidates, facilitation of both virtual and in-person interviews for semi-finalists and finalists, salary negotiations, as well as reference and background checks. The recruitments conducted include *Park Land Resource Manager (Current)*, *Human Resources Management Director (2023)*, *Engineering Division Manager (2023)*, *Engineer/Sr. Engineer - Traffic (2022)*, *Engineer – Development Services (2022)*, *Finance Director (2022)*, *Risk Safety Specialist (2022)*, *Senior Engineer (2022)*, *Engineer – Development Services (2022)*, *Floodplain Manager (2022)*, *Survey Records Manager (2022)*, *Public Works Director (2021)*, and *Administrative Services Division Director, Sr. (2020)*.

The Woodlands Township, TX. CPS HR conducted full recruitment processes that involved key stakeholder meetings, development of a marketing brochure, placement of paid advertising, in-depth outreach, research to find high caliber (active and passive) candidates, resume review, screening interviews of top tier candidates, facilitation of both virtual and in-person interviews for semi-finalists and finalists, salary negotiations, as well as reference and background checks. The recruitments conducted include *Director of Communications (2023)* and *Director of Human Resources (2022)*.

Subcategory: Training

Texas Comptroller. CPS HR has been (and is currently) delivering live virtual training for Texas Comptroller staff and leaders since 2019. All courses are delivered as live virtual instructor-led training. Courses have included: The Art of Delegation, Three Habits Successful Remote Worker, The Delicate Art of Persuasion, Introduction to Cultural Intelligence, Problem Solving and Decision-Making, Effective Listening, StrengthsFinder, Change Leadership, Mission Centric Goals, Diversity and Inclusion: Why It Matters, Coaching for Performance, Strategic Mindset, and many more.

Brownsville Public Utilities Board. CPS HR was engaged by the Brownsville Public Utilities Board to deliver a leadership academy for managers and supervisors as well as a comprehensive customer service training series. The leadership academy was delivered twice – once in 2021 and once in 2022. The program of six (6) half-day courses included: Leading in a Complex Environment, Leadership Communications, Building High Performance Teams – Coaching and Mentoring, Building High Performance Teams – Employee Engagement, Strategic Thinking, Vision and Values, and Managing and Measuring Performance.

Los Angeles Department of Water and Power. CPS HR has a master contract with the Los Angeles Department of Water and Power (LADWP) to deliver onsite and live virtual instructor-led training. Courses have included: Project Management, Speaking with Confidence, Effective Communication Skills, Tell Your Story with Data, Resolving Conflict, Editing and Proofreading, Policy and Procedure Writing, Writing Letters, Memos and Email, Diversity and Inclusion: Why It Matters, Presentation Skills, and many more.

City of Kerrville. In 2022, CPS HR delivered Harassment Prevention training for all staff and managers in the City of Kerrville. Nine sessions of training were delivered in-person.

City of Sacramento. CPS HR has been delivering live virtual instructor-led training for the City of Sacramento since 2019. Initiating as a pilot in 2019 with a few courses, the following year expanded to more than 40-courses for all staff and leaders. Courses have included: MBTI – Understanding Personalities, Franklin Covey's 7-Habits of Highly Effective People, Public Speaking, Introduction to Analytical Staffwork, Thinking Strategically, Acting Mindful, Writing Skills for Analysts, Project Management, So You Want to Be a Supervisor, Emotional Intelligence, Resolving Conflict, Dealing with Difficult People, Strategies for Collecting, Analyzing and Reporting Data, Critical and Creative Thinking for Problem Solving, Business Writing, Listening Skills with Challenging Customers, Team Development for Leaders, and many more.

Subcategory: Testing and Assessment

City of Fort Worth, Texas. CPS HR Consulting has developed fully customized promotional law enforcement and fire service examinations since 2004.

City of Grand Prairie, Texas. CPS HR has provided Entry-Level Law Enforcement examinations since 2011.

City of Irving, Texas. CPS HR has provided Entry-Level Law Enforcement examinations since 2017.

City of Plano, Texas. CPS HR has provided Entry-Level Law Enforcement examinations since 2019.

California Department of Parks and Recreation. Since 2010, CPS HR Consulting has been conducting a wide variety of job analyses for the Department. Over approximately 30 job analytic studies have been conducted ranging from Accountant to Water Treatment Operator.

Tab C - Quality Control

Project Progress Monitoring and Deadline Adherence

Ensuring Successful Results

CPS HR uses a comprehensive approach for planning, organizing, directing, and controlling consulting engagements. Our approach is designed to ensure a focused and efficiently executed project. We use sound project management procedures and ongoing communication to ensure project success.

We are committed to ensuring transparent communication and adherence to project timelines throughout the duration of our collaboration with the Agency. To achieve this, we employ a set of procedures designed to keep all stakeholders well-informed and the project on track.

- **Dedicated Project Manager:** Your project will be overseen by a dedicated CPS HR Project Manager who will serve as your primary point of contact. This seasoned professional will be responsible for orchestrating project activities, tracking progress, and ensuring that all milestones and deadlines are met.
- **Milestone Timeline:** After the project kick-off meeting, CPS HR will provide a detailed milestone timeline. This timeline outlines key project phases, specific deadlines, and deliverable dates, providing a clear roadmap for the project's progression.
- **Regular Meetings:** To facilitate ongoing communication and progress monitoring, CPS HR will schedule standing bi-weekly or monthly meetings with the Agency's designated representatives. These meetings serve as valuable touchpoints for discussing project status, addressing concerns, and making necessary adjustments to ensure the project stays on course.
- **Microsoft Teams™:** For even more immediate and frequent updates, CPS HR will leverage Microsoft Teams™ as a collaborative platform. This allows for real-time sharing of project-related information, documents, and updates, enhancing transparency and accessibility.
- **Ad Hoc Telephone Conferences:** In addition to structured meetings, we understand that sometimes unforeseen issues or urgent matters may arise. To address these situations promptly and efficiently, we conduct ad hoc telephone conferences. These discussions can be scheduled whenever the need arises, providing a direct line of communication between our team and the Agency's representatives. These opportunities ensure that timely decisions and solutions can be reached to maintain project momentum.
- **Early Risk Analysis:** In the event of any potential roadblocks that may affect project timelines, CPS HR is proactive in conducting risk analysis. This preemptive approach allows us to identify challenges swiftly and develop mitigation strategies to keep the project moving forward without significant delays.

By implementing these procedures, CPS HR plans to provide the Agency with a project management framework that ensures constant progress tracking, effective communication, and timely achievement of project milestones and deadlines.

Tab D - Technical Proposal

1. Review “Section 4: Specifications” of this RFP. Are there any requirements that you cannot provide, or offer an alternative to? Describe any exceptions to the requirements. If there are no exceptions, please explicitly state that no exceptions are taken to any part of Section 4.

Further, describe any exceptions to other sections of this RFP. Your offer must be in compliance with stated terms and conditions unless NCTCOG accepts written identified exceptions of your proposal.

Exceptions

Section 4: Specifications. None

Section 6: General Terms and Conditions. We request to add our following pre-existing intellectual property language:

Retention of Rights. *“Contractor shall retain all right, title and interest in and to all pre-existing training, testing or assessment products, inventions (patentable or otherwise), discoveries, improvements, or copyrightable works, whether or not incorporated into a derivative work produced under this Agreement, but grants NCTCOG an irrevocable, royalty-free, perpetual and non-exclusive license to use the work solely for internal purposes. In addition, to the extent that Contractor incorporates pre-existing works into a derivative work, Contractor will retain ownership of the pre-existing portion of the derivative work. Apart from the above, any other work product, including those portions of derivative works created exclusively for NCTCOG with funds provided under this Agreement, shall be considered works made for hire and shall be owned by NCTCOG.”*

With regards to insurance, please be advised that CPS HR does not own any automobiles, and our self-insured retention is \$50,000.

2. Information under this section should include, but not be limited to, your understanding of the RFP requirements and your firm’s approach:
 - a. Demonstrate a clear understanding of the project by providing a concise description of how you propose to provide the services identified in this RFP.

Our Understanding of the Scope of Work

Service Category #1: Consulting Services

CPS HR understands NCTCOG is seeking a consulting firm to conduct classification and compensation study services based on an Agency’s request within the following parameters.

■ Classification Plan

- Up to a **specific number of** classifications and up to a **specific number of** incumbents
 - Several orientations for study participants/stakeholders
 - Online position description questionnaire with online supervisor review process
 - Incumbent/supervisor job evaluation interviews of selected study participants

- Update of all existing classification specifications and creation of new classification specifications
- Update the classification structure
- Conduct Fair Labor Standards Act analysis
- Provision of incumbent allocations into the new classification structure and conduct an appeals process
- Provision of project report and formal presentations at the conclusion of the study
- Development and provision of maintenance training session

■ **Compensation Plan**

- Base salary¹ collection, analysis, and comparison
 - Up to **a specific number of** benchmark classifications
 - Labor market pool of up to **a specific number of agencies** (CPS HR can research a pool and provide recommendations or the agency can provide the list)
 - Provision of Excel data sheets showing variance from the market, a project report, and formal presentations at conclusion of study
 - Discussion of implementation considerations
 - Development and provision of a maintenance training session

Service Category #2: Optional Ancillary Services

Subcategory: Full Compensation Package Review

- Base salary and benefits ² collection, analysis, and comparison
 - Up to **a specific number of** benchmark classifications
 - Labor market pool of up to **a specific number of agencies** (CPS HR can research a pool and provide recommendations or the agency can provide the list)
 - Provision of Excel data sheets showing variance from the market and benefits elements, a project report, and formal presentations at conclusion of study
 - Discussion of implementation considerations
 - Development and provision of a maintenance training session

¹ CPS HR will collect the minimum and maximum of the range of each job match made in each comparable labor market agency. Actual incumbent salaries will not be collected.

² CPS HR will collect the minimum and maximum of the range of each job match made in each comparable labor market agency. Actual incumbent salaries will not be collected.

Subcategory: Employee Engagement

The CPS HR Institute for Public Sector Employee Engagement™ will adapt our employee engagement model, shown below, to meet the Agency's specific needs and requirements. Our approach/work plan proceeds from our process model.

Employee Engagement Process Model:



Adapted from *Engaging Government Employees* (American Management Association)
by Bob Lavigna

We believe employee engagement can – and should – be measured. Government organizations should survey their employees to measure engagement levels, and to understand what drives engagement. However, surveying employees is only the start. The real payoff is identifying and taking action to improve engagement. While there is no one-size-fits-all solution to building a high level of engagement, CPS HR's Institute will leverage decades of research, experience, and insights to help guide the Agency on a path to improved engagement.

We do not simply apply our model as an off-the-shelf tool. Instead, we adapt our approach to meet the Agency's specific needs and requirements, including offering a comprehensive survey question bank as the starting point for the survey. We fully support the Agency during the survey administration process, including offering a kickoff presentation to employees to ensure a high response rate, providing technical support to help employees access the survey, as well as special services for hard-to-reach employee populations. We deliver comprehensive, interactive online reports to help Agency leaders understand their results and key driver analyses to identify areas which are most likely to improve employee engagement. Finally, we offer experienced consultants who are former leaders in government themselves to help guide Agencies as they take action on the results.

Subcategory: Recruitment

CPS HR can provide full-service recruitment as needed. Our services include three levels:

- Outreach level to build a qualified candidate pool and handle advertising
- Outreach and screening to produce a short list of qualified candidates
- Full recruitment from outreach, through screening, and final selection processes to an offer to the chosen candidate.

We can provide this for middle management, hard-to-fill, or executive levels. As experts in public sector recruiting, we have been making successful placements for 20 years.

Subcategory: Training

CPS HR can provide training and development either to NCTCOG staff or to your member agencies. Training and development has been a core service area at CPS HR since 2004 and we can provide group training courses as needed. Those courses can be sponsored by NCTCOG and offered to member agencies. Agencies can choose from a catalog of over 150 courses that can be delivered in-person or remotely for large or small groups. Courses can also be tailored if needed.

Subcategory: Testing and Assessment

Produce Written Exams

CPS HR understands that during the course of this project, we may provide employment exams to Agencies that will determine the knowledge, skills, and abilities for each job candidate and position being tested.

CPS HR's test rental catalog offers more than 50 types of multiple choice entry-level and promotional employment tests for a wide range of public agency positions including public safety (i.e., fire service and law enforcement), clerical, professional, skilled trades, and other para-professional positions. These exams are developed to meet the most stringent psychometric standards and are frequently updated to ensure content relevance as well as to prevent overexposure. They can easily be administered online, and we can provide options for remote proctoring of online exams.

Job Analysis

CPS HR is pleased to submit a job analysis option within this proposal for a variety of job classification titles, as may be needed by Agencies. While there is no single correct method for conducting a job analysis, certain requirements must be met if the results of the job analysis will be used for making employment decisions, including establishing criteria for applicant screening, hiring, promotions, and job training.

CPS HR's job analytic approach is designed to comply with all prevailing technical standards and legal guidelines in the field of employment selection, most notably, the federal Uniform Guidelines on Employee Selection Procedures for demonstrating the content validity of selection processes resulting from job analytic results.

- b. **Provide a detailed description of proposed services and the means and methods to be used to accomplish the tasks identified in the Scope of Work section. This work plan will detail team assignments and narratives of work approach and work force, and schedule of activities with time allocations.**

Work Plans and Methodologies

Service Category #1: Consulting Services

Classification Plan

Task 1.1 – Receive and Review Background Materials. Upon contract execution, CPS HR will gather background information including the following materials:

- Organizational Charts
- Memorandums of Understanding, as applicable
- Classification Specifications (Electronic copies)
- Past Classification and Compensation Studies
- Relevant Policies and Procedures
- Agency’s Mission, Vision, and Values statements

Client Responsibilities and/or Pricing Assumptions Associated with Task:

- The client will upload electronic copies of all requested documents to a shared online site provided by CPS HR.
- The employee roster provided by the client will establish a mutually agreed effective date.
 - Any subsequent alterations or discrepancies in the roster will be promptly addressed through consultation with CPS HR and the client. The accuracy of the roster is vital, as it directly impacts the completion of Position Description Questionnaires (PDQs) and the supervisor review process.

Task 1.2 – Initial Project Meeting. During the kick-off meeting for the classification study, CPS HR's Project Manager will convene with the Agency’s internal project staff and designated key stakeholders. The primary objectives of this meeting are to:

- **Confirm Study Goals and Objectives:** Establish a clear understanding of the study's overarching goals and specific objectives, ensuring alignment between CPS HR and the client’s expectations.
- **Define Project Tasks:** Outline the comprehensive list of tasks to be performed throughout the study, clarifying roles and responsibilities for all parties involved.
- **Discuss Methodologies:** Delve into the chosen methodologies and tailored approaches for the classification study, promoting transparency and consensus on project deliverables.
- **Develop a Communication Plan:** Collaboratively design a communication plan tailored to the needs of the project. This plan will address communication frequency, channels, and key contacts, emphasizing the importance of open and consistent communication as a cornerstone of project acceptance and success.

Client Responsibilities and/or Pricing Assumptions Associated with Task:

- After the kick-off meeting, CPS HR will provide a project parameters memo for the client's review and approval, ensuring mutual alignment before progressing with the project.
- CPS HR will furnish an estimated timeline, including key milestones, shortly following the approval of the project parameters document.

Task 1.3 – Develop Job Evaluation Tool. CPS HR will use a survey tool to ensure valid information is gathered, analyzed, and documented consistently from incumbents regarding their current classifications. This activity includes finalizing a Position Description Questionnaire (PDQ) for approval by the Agency, and distribution of the PDQ to study participants.

The PDQ is designed to capture specific information, and to be used in studies with multiple analytical goals such as position allocation and classification specification development/revisions.

Client Responsibilities and/or Pricing Assumptions Associated with Task:

- For purposes of creating a cost-effective response, our pricing assumes the Agency will use CPS HR's PDQ with minor (3-4) edits. Additional hours spent on the task will be contracted separately.
- The PDQ will be provided in English in online survey format. All surveys will be completed online³.

Task 1.4 – Conduct Orientation Sessions. The CPS HR Project Manager will draft a communication to be sent via e-mail (by Agency staff) to all employees included in the study to invite them to attend an orientation session. For purposes of this scope of work, we have planned for **several virtual, one-hour orientation sessions** to be conducted in the same week, one of which can be recorded by CPS HR for viewing by individuals who are not able to attend the scheduled session(s).

The purpose of the orientation session is to (i) **communicate** study goals, methodology, and processes; (ii) **demonstrate** the PDQ and explain to employees how the document should be completed; (iii) **explain** the role of employees, supervisors, and managers in the study; and (iv) **respond** to employee questions regarding the study process.

These tasks and processes are critical in gaining employee understanding, trust, and acceptance of the study. Where possible, we encourage executives, managers, supervisors, employee bargaining unit representatives, and human resources staff to attend the meeting(s) to familiarize themselves with employee questions and the responses to those questions.

Task 1.5 – PDQ Completion. All study employees will have the opportunity to provide information on the duties and responsibilities as it relates to job specifications, duties not covered in the job specification, minimum qualifications, and other aspects of the classification. Each incumbent's supervisor (*during a 1-level review process*) will then review the collected data to ensure that the incumbent has accurately and sufficiently captured all pertinent information on job context and work output.

³ We are open to discussing alternatives to online completion should the client desire to accommodate any personnel who do not have web/computer access during the conduct of their job duties. Depending on the alternative chosen, an amendment to the contract for additional funding may be necessary.

Client Responsibilities and/or Pricing Assumptions Associated with Task:

- All PDQs will be completed online, including the supervisor/manager review process.
- Links to the PDQ will be sent to incumbents via e-mail by CPS HR. A complete and accurate roster, including employee name and e-mail address (among other data points), will be uploaded to the shared online site by Agency staff using a Microsoft Excel template provided by CPS HR. Any needed corrections to the roster will be completed by the client to maintain accuracy.
- **Responsiveness of study participants is absolutely critical to maintaining the agreed upon timeline.** An amended timeline will be provided by the CPS HR Project Manager if the online PDQ completion date is pushed out. Any contract amendment needed due to timeline shift will be discussed with the Agency at the appropriate point.
- The supervisor/manager review process includes one (1) level of supervisory review.

Task 1.6 – Receive and Review PDQs/Prepare for Job Evaluation Interviews. The CPS HR Project Team will thoroughly review each completed PDQ⁴ to obtain an understanding of the duties and responsibilities assigned to the position. Job evaluation interview questions for selected study employees will be developed based upon the results of the documentation review. CPS HR Project Team members will develop an interview schedule for selected incumbents and will coordinate the schedule with the Agency's designated staff member.

Client Responsibilities and/or Pricing Assumptions Associated with Task:

For purposes of creating a cost-effective response, our pricing assumes that:

- up to **an estimated percentage** of incumbents will provide completed PDQs. Therefore, project staff will review up to **a specific number of** returned PDQs⁵
- project staff will create interview questions for up to **an estimated percentage** of those respondents (or **a specific number of** incumbents)
- up to **a specific number of** supervisor interviews will be conducted
 - Should the client request additional reviews of PDQs or request extra interviews, these services can be included at an added cost.
- CPS HR will develop an interview schedule in coordination with the client and will send a meeting invitation to incumbents, and then later to supervisors, via e-mail. Staff will have one (1) opportunity to request a re-schedule if needed. At the agreed-upon deadline, staff may not change the final selected time slot.

⁴ For single position classifications lacking a completed PDQ, CPS HR will provide an opportunity for the appropriate supervisor to provide commentary on that position's duties and scope.

⁵ If more than the expected percentage of incumbents provide responses to the PDQ, the Agency shall identify the appropriate incumbents to be included in the review process at the cap indicated above.

Task 1.7 – Conduct Job Evaluation Interviews, follow up Supervisor/Manager Interviews. In addition to PDQs, job evaluation interviews will be conducted with *selected* incumbents to ensure the CPS HR Project Team has a complete understanding of the duties and responsibilities assigned to the position. Incumbents to be interviewed, or invited to participate in a focus group, is determined during the PDQ review process.

Additionally, interviews with supervisors or managers may also be held to further clarify information documented on their subordinate employees' PDQs. For planning purposes, each interview session may take up to sixty (60) minutes via video or telephone conference. **For purposes of this costing, reschedules for missed interviews have not been estimated.**

Client Responsibilities and/or Pricing Assumptions Associated with Task:

- CPS HR reserves the right to identify the interviewees.
- Interviews will take place over sequential business days and will take place between the hours of 9:00 am and 5:00 pm Local Time via telephone or video conference.
- If requested, we can supply a contract amendment to accommodate a reschedule process or add additional interviewees.

Task 1.8 – FLSA Analysis. CPS HR is committed to ensuring that each classification aligns with the Fair Labor Standards Act (FLSA) exempt and non-exempt designations. Our thorough analysis delves into the duties, responsibilities, scope of authority, and span of control associated with each classification. This examination aims to determine whether the positions qualify for exemption or non-exemption from FLSA overtime provisions.

Our approach to FLSA analysis offers two options: Classification-based or Position-based FLSA Analysis. **For this specific project, we will focus on a Classification-based FLSA Analysis.** This means we will carefully review the existing classification specifications to assess whether each studied classification meets the criteria for exemption from FLSA overtime provisions, with our conclusions grounded in the updated classification specifications.

While CPS HR will provide these determinations, we strongly recommend that the client's legal team review the FLSA determinations to ensure full compliance with legal requirements and regulations. Our goal is to ensure that all classifications are appropriately categorized under FLSA guidelines.

General Process for Determining FLSA Designation by Classification:

1. **Gather Classification Specifications:** Collect the current classification specifications for each job position under consideration.
2. **Analyze Job Duties and Responsibilities:** Review the duties, responsibilities, and essential functions associated with each classification. Consider the scope of authority and span of control.
3. **Identify Relevant FLSA Criteria:** Identify key FLSA criteria such as job duties, salary level, and salary basis.
4. **Examine Salary Levels:** Evaluate the salary levels of positions to determine whether they meet the salary threshold for exemption, as outlined in FLSA regulations.
5. **Apply Job Duties to FLSA Criteria:** Assess whether the job duties align with FLSA guidelines for exemption or non-exemption.

6. Consider Any Exemptions: Explore specific FLSA exemptions, such as the executive, administrative, professional, or other applicable exemptions, as they relate to job roles.
7. Consult with Legal Team: Request the client involve its legal team to review FLSA determinations for compliance with legal requirements and regulations.
8. Document Findings: Create a clear and detailed summary outlining the FLSA designation for each classification, including the rationale and criteria considered.
9. Recommendations: Provide recommendations for any necessary adjustments or revisions to ensure FLSA compliance.
10. Client Review: Share the FLSA determinations and recommendations with the client for review and feedback.
11. Final Determination: After client input, make any necessary final adjustments to the FLSA designations.

Client Responsibilities After Project Completed:

12. Communication: Communicate the final FLSA designations to relevant stakeholders.
13. Recordkeeping: Maintain accurate records of the FLSA designations and any associated documentation for compliance purposes.
14. Ongoing Compliance Monitoring: Continuously monitor and review FLSA compliance to address any changes in job roles, regulations, or organizational needs.

Task 1.9 – Physical Requirements Review. We will review each classification's core functions. CPS HR will prepare a questionnaire as part of the data collection effort to gather information about the physical demands and working conditions. In addition, the CPS HR Project Team will capture data through the PDQs about core functions.

*While CPS HR is committed to providing comprehensive classification and compensation services, it is important to note that our primary expertise lies in conducting detailed classification and compensation studies. We excel in thoroughly evaluating job positions, responsibilities, and compensation structures to ensure they align with industry best practices and client objectives. **However, our specialization is not in ADA (Americans with Disabilities Act) compliance analysis.** While we do perform a general physical environment review as part of our process, we recommend that any specific ADA compliance analysis or adjustments should be conducted by experts specializing in ADA compliance to ensure full legal and regulatory adherence. Our focus remains on delivering excellence in classification and compensation studies, and we encourage clients to seek dedicated ADA compliance experts for this specific aspect.*

Task 1.10 – Analyze Classification Data. The Project Team will analyze all information collected from the incumbents and their supervisor/manager, and any job evaluation interviews to identify the job level, scope, typical duties, requisite knowledge, skills, abilities, and other job-related characteristics of each position. This analysis will be used to develop recommendations regarding classification concepts and a classification structure that aligns with current business needs, and to evaluate the proper classification allocation for study employees.

Task 1.11 – Prepare and Present Findings. The Project Team will prepare a presentation which will include the methodology, findings, and preliminary recommendations.

Client Responsibilities and/or Pricing Assumptions Associated with Task:

- Costs assume one meeting with the client’s Project Manager/HR staff to discuss these topics.

Task 1.12 – Revise Classification Specifications. Once the Agency has approved the classification study findings, the classification specifications will be revised/created accordingly. The format for classification specification revisions will be submitted to the Agency for approval. Our methodology for this task will result in:

- Accurately identifying the specific essential duties and responsibilities; required knowledge, skills, and abilities; minimum education and experience requirements; and minimum special qualifications for each position in the study.
- Reviewing, revising, editing, and developing written classification specifications for each study classification that clearly specify and describe a general statement of duties; any distinguishing features of the class; essential duties, knowledge, skills, and abilities; acceptable minimum education and experience; and required special training and certifications.
- Describing the typical work environment for the classification.

Client Responsibilities and/or Pricing Assumptions Associated with Task:

- CPS HR will provide a classification specification template via the shared online site if the Agency does not already have one that must be utilized.
- Classification specifications will be uploaded to the shared online site. Documents will be marked “Draft” and provided in Microsoft Word with several views – “with mark-up” and “without mark-up.” This will allow the Agency to easily view tracked changes. Edits and comments made by both parties will be captured in these online shared documents.

Task 1.13 – Incumbent Allocation and Appeals Process. Following the finalization of classification specifications, the client will notify incumbents of the study results as it applies to his/her/their direct classification and position. Similar to the PDQ process, incumbents will be able to provide feedback on the allocation and/or job description via an online process set up by CPS HR. CPS HR will receive and process the appeals, and create a response for the Agency’s finalization within a period mutually agreed upon by CPS HR and the client.

Client Responsibilities and/or Pricing Assumptions Associated with Task:

- For purposes of creating a cost-effective response, our pricing assumes that up to **an estimated percentage** of incumbents will submit appeals. Therefore, project staff will review up to **a specific number of** appeals.
- **Submission of appeals within the initial time frame is absolutely critical to maintaining the agreed timeline.** An amended timeline will be provided by the CPS HR Project Manager if the appeals submission timeframe is pushed out.

Task 1.14 – Prepare, Submit, and Present the Classification Report. CPS HR’s reporting will include a discussion of our methodology and a narrative summary to support our recommendations in the report. The Agency will be responsible for approving and implementing classification specification content changes through its standard process, including any necessary notifications to employees, employee representatives, or the Department of Human Resources.

Client Responsibilities and/or Pricing Assumptions Associated with Task:

- Costs assume one (1) meeting, for up to 1.5 hours to present the report.
 - We can also budgeted for additional presentations for stakeholder groups of the client’s choosing.
- An opportunity for a single round of feedback/updates to the report will be provided to the client.

Task 1.15 – Classification System Training. CPS HR understands the Agency’s objective for a permanent classification system that empowers the Agency to confidently manage position classifications and reclassifications while maintaining the integrity of the structure. The comprehensive plan devised by CPS HR during this study will lay the groundwork for the establishment of this system.

To formalize knowledge transfer, upon the study's conclusion, CPS HR will conduct a virtual training session focused on the foundations and ongoing maintenance of the classification system, specifically tailored for selected staff members. Our objective is to equip the Agency with the essential tools for sustained system maintenance, ensuring consistent application.

CPS HR envisions a collaborative effort with the Agency’s Project Manager and other stakeholders to engage in an informative dialogue regarding processes, methodologies, goals, and maintenance. This collaboration will encompass:

- Providing a best practices guide, accompanied by a description of the classification structure developed for this project.
- Hosting a live 2-hour webinar for selected personnel (which can be recorded and hosted by the Agency for ongoing accessibility) to delve into the guide's contents.

Compensation Plan

Task 2.1 – Review the Agency’s Background Materials. Upon contract execution, CPS HR will request background information from the Agency to ensure our Project Manager and Project Team are prepared for initial meetings. The CPS HR Project Manager will coordinate activities through and report to the Agency’s Internal Project Manager and other designated key stakeholders.

Task 2.2 – Initial Project Meeting/Labor Market Agency and Benchmark Selection Discussions. The primary objective of this task is to conduct an initial meeting between the CPS HR Project Manager and the Agency’s Internal Project Manager along with other designated stakeholders. This meeting will aim to align all parties on the study methodology, deliverables, timelines, communication strategies, and data collection methods. Additionally, the meeting will serve as an opportunity to delve into the specifics of the Agency’s current compensation philosophy and its market positioning goals.

The following key elements will be discussed:

- Overall scope of the study
- Data gathering methodology and the job matching process
- Review whether the Agency aims to lag, meet, or lead the market
- Use of median, mean, or other percentiles for market positioning
- Labor market agency selection and research process
- Benchmark classifications, considering skills, competencies, and responsibilities; how benchmark classifications compare to similar roles in competitor agencies or organizations
- Various phases of the study and review of general timelines
- Channels for ongoing communication between CPS HR and the Agency
- How to engage with other stakeholders such as labor unions, employees, and department heads
- Deliverables and first immediate steps

Client Responsibilities and/or Pricing Assumptions Associated with Task:

- It is assumed that no more than a **specific number of** benchmark classifications will be surveyed.
 - CPS HR will complete a benchmark summary matrix describing various components of each job, such as primary duties, minimum qualifications, distinguishing characteristics, etc.
- It is assumed that no more than a **specific number of** total labor market agencies will be selected for comparison.
 - CPS HR will research up to a **specific number of** comparable labor market agencies and provide recommendations for final selection by the Agency.

Task 2.3 – Design, Develop, and Distribute the Survey Instrument. The CPS HR Project Team will develop a comprehensive survey instrument to ensure the effective collection of compensation data from each of the survey agencies. The online survey will include a brief description of each of the survey classifications with a request for the minimum and maximum monthly salary for each.

For a *base salary* study, the survey instrument will include a brief description of each of the survey classifications with a request for the minimum and maximum monthly salary for each. Salaries are retrieved from published salary schedules effective on an agreed upon date.

Task 2.4 – Review, Analyze, and Validate Labor Market Survey Data. CPS HR begins labor market data collection by researching available information online to make preliminary classification matches and obtain benefits data. The CPS HR Project Team will reach out to labor market agencies to confirm and/or complete survey data after completing as much pre-work as possible. We find that this initial collection effort results in greater participation from the labor market agencies.

Classification matching includes reviewing agency background materials such as copies of classification specifications, organization charts, staffing information, and other useful materials to substantiate the accuracy of the comparability of the matches. It is critical that the CPS HR Project Team review such documents since titles alone can often be misleading and should not be relied upon.

To determine whether a match from a labor market agency is comparable to the Agency's benchmark, CPS HR utilizes a whole job analysis methodology; this commonly used methodology analyzes the job as a whole, rather than by individual factors, by evaluating the core duties and responsibilities, the nature and level of work performed, and the minimum qualifications to determine whether the classification is comparable enough to be utilized as a match. The methodology recognizes slight differences in duties assigned to matches from other labor market agencies which do not impact the type, nature, and level of work performed.

Client Responsibilities and/or Pricing Assumptions Associated with Task:

- Should any labor market agencies be non-responsive to requests for information, we will provide the Agency with contact information and request that they use their professional contacts to follow up on CPS HR's behalf. We have found this approach to be beneficial.
- At an additional cost, the Agency may add additional labor market agencies should any in the initial selection be non-responsive or not provide sufficient matches.
- **Responsiveness of labor market agencies is absolutely critical to maintaining the agreed timeline.** An amended timeline will be provided by the CPS HR Project Manager if the data collection period is pushed out.

Task 2.5 – Design and Develop Data Spreadsheets. CPS HR will develop an individual data sheet for each survey classification that presents the comparable classification used in each agency with the relevant data associated with that classification, such as the position ranking within the labor market and salary range minimum and maximum.

The labor market data analyses will be conducted based upon the labor market position affirmed within the Agency's compensation philosophy (e.g., median, mean, or other percentile). Each comparable match for each survey classification is reported in the relevant data sheet for full disclosure and review by others. We find this level of transparency in matching provides for a better understanding and acceptance of study results.

Task 2.6 – Conduct Internal Equity Analysis/Prepare Draft Salary Recommendations/Update Compensation Structure. A well-rounded compensation program encompasses an evaluation of external labor market data as well as a careful assessment of internal job relationships aligned with the Agency's values. The internal equity analysis for non-benchmark classifications involves a series of essential steps to establish fair and consistent relationships. These steps include:

1. **Analysis of Pay Relationships:** This involves evaluating pay relationships based on the hierarchy of jobs and historical pay practices.
2. **Development of Guidelines:** These guidelines encompass factors like span of control and the nature and level of work performed.
3. **Recommendation of Differentials:** Based on the above analysis, we will recommend equitable and appropriate internal relationship differentials between classifications/pay grades.

Our methodology for setting salary levels for both benchmark and non-benchmark classifications follows these steps, ensuring consistency across all Agency study classifications:

1. **Benchmark Classifications:** We identify benchmark classifications that serve as reference points for salary setting based on market data.
2. **Salary Recommendations:** Salary levels for benchmark classifications are established in line with market data.
3. **Internal Alignment Review:** We conduct a comprehensive review of the Agency's existing internal alignment differentials to assess where adjustments are needed.
4. **Internal Differentials:** Recommended internal differentials are applied within job families to determine salaries for classifications with significant relationships due to shared job series or family.
5. **Remaining Classifications:** For non-benchmark classifications or those with limited comparable data, we evaluate their alignment with other classifications based on factors such as job nature, level, and minimum qualifications.

The salary recommendations for each study classification will include:

- Classification Title
- Current Monthly Range Maximum
- Recommended Monthly Range Maximum
- Percentage or Dollar Amount Differences between Current and Recommended Ranges, including steps within a range if desired.

This detailed information enables the Agency to assess the percentage and dollar amount of any increase on a classification-by-classification basis. Our approach ensures a thorough and equitable compensation structure that aligns with both external market data and internal relationships within the organization.

Finally, updating the compensation structure itself is a complex process that involves a thorough evaluation of an organization's pay practices. The first step is to conduct a comprehensive analysis of market data, internal equity, and the organization's strategic goals. This analysis helps in identifying areas that require adjustment within the compensation structure. Some key technical aspects include:

- **Range Type Decision:** Whether to use an open range or a step system for salary scales, considering factors like flexibility and performance-based incentives.
- **Bandwidth Analysis:** Analyzing the width between the minimum and maximum salaries within each pay grade to determine the balance between cost control and talent attraction and retention.
- **Separation Between Pay Grades:** Reviewing the separation between pay grades to ensure clear distinctions in job value and responsibilities, aligning them with market standards, internal equity, and the organization's compensation philosophy. This will help easily spot situations where there is minimal pay difference between employees at different levels.

Client Responsibilities and/or Pricing Assumptions Associated with Task:

- Determination of exact cost to implement any salary range changes will be the responsibility of the client. Implementation considerations will be discussed by CPS HR.
- The compensation structure will also be updated. For example, changes will be made to the *bandwidth* of each pay grade or the *separation* between grades. CPS HR will also discuss potential compression or compaction issues with the client.

Task 2.7 – Prepare and Present the Compensation Report. The CPS HR Project Team will develop a report detailing the results of the methodology and results of the labor market survey. This report will be comprised of the following:

- Scope of the study, list of benchmark classifications and labor market agencies
- Results of the base salary survey (job matches to be provided under separate cover in MS Excel)
- Labor market data analysis (data sheets provided under separate cover in MS Excel)
- Actions taken to develop salary recommendations and update the compensation structure

Client Responsibilities and/or Pricing Assumptions Associated with Task:

- Costs assume one (1) meeting, for up to 1.5 hours to present the report.
 - We can also budget for additional presentations for stakeholder groups of the client's choosing.
- The report will be submitted with an opportunity for feedback/updates to the report by the client.

Task 2.8 – Compensation System Training. CPS HR recognizes the Agency's desire for a permanent system that allows the Agency to equitably pay its staff and maintain its compensation system. The plan developed by CPS HR over the course of this study will create the foundation for this system.

To formally capture learning, at the conclusion of the study, CPS HR will conduct a virtual training session on the underpinnings and maintenance of the compensation system with selected staff. The goal is to provide the client with the tools necessary for the continued maintenance of the system to ensure consistent and accurate application.

CPS HR envisions a collaborative effort with the Agency's Project Manager and other stakeholders to engage in an informative dialogue regarding processes, methodologies, goals, and maintenance. This collaboration will encompass:

- Providing a best practices guide, accompanied by a description of the compensation structure developed for this project.
- Hosting a live 2-hour webinar for selected personnel (which can be recorded and hosted by the Agency for ongoing accessibility) to delve into the guide's contents.

Service Category #2: Optional Ancillary Services

Subcategory: Full Compensation Package Review

The methodology previously presented for a base compensation study is the same for a full compensation review (base salary and benefits) with the addition of the collection of benefits elements. For a *total compensation* study, the following elements of total compensation are added to the base salary survey:

- 1) Retirement Contributions - Money paid by the employer on behalf of employees (members). The data are collected for reporting and are included in total compensation calculations.
 - a. Employer Retirement Contribution - CPS HR reports and analyze a stated percentage of salary paid by the employer or the employee at the current point in time. The normal cost rate is collected, which excludes unfunded accrued liability.

- b. Medicare - Contribution rate of 1.45% times the base salary median is used to calculate total compensation, there is no maximum compensation limit.
- c. Social Security (if agency participates) - Contribution rate is 6.20% of the median compensation and is included in the total compensation calculation.
- 2) Health benefits data are collected for reporting and are included in total compensation calculations.
 - a. Medical, Dental, and Vision benefits, based on the maximum contribution for family coverage (employee + 2 or more dependents)
 - b. Cafeteria Plans (Flex Credit & Health Savings Account)
- 3) These data are collected for reporting purposes only and are not included in total compensation calculations.
 - a. Sick Leave
 - b. Holiday Leave
 - c. Vacation Leave
 - d. Paid Time Off
 - e. Administrative/Management Leave
- 4) Cash Add-Ons are defined as “supplemental pay and benefit components that are equivalent to cash for the employee” and are typically found in a benefit summary document or bargaining agreement. The data are collected for reporting and are included in total compensation calculations.
 - a. Retirement Pick-up (i.e., Employer Paid Member Contribution (EPMC))
 - b. Deferred Compensation (i.e., 457b, 401k, 403b)
 - c. Incentives (only education/certifications, performance)
 - d. Longevity
 - e. Allowances (only vehicle, cell phone, and uniform, as applicable)

Client Responsibilities and/or Pricing Assumptions Associated with Task:

- The client may add other benefits elements, should it desire, at an additional cost.
- The client shall complete a spreadsheet (template provided by CPS HR) detailing the client’s benefits elements and their costs/details.
- Please note that only employer costs are collected; not employee costs.

The benefit data submitted from the labor market agencies will be analyzed quantitatively and qualitatively.

In the quantitative analysis, specific benefits will be incorporated into the base salary data sheets to provide a total compensation analysis. This analysis of program costs will provide the client with an understanding of how the study classes compare against their market when the costs of benefits programs are taken into consideration.

Within these data sheets, four different analyses can be conducted based on how our clients wish to view the data:

1. An analysis of the survey classification's position within the labor market for base salary
2. An analysis of the survey classification's position within the labor market when the cost of cash add-ons is taken into consideration (total cash)
3. An analysis of the survey classification's position within the labor market when the cost of cash add-ons and health programs are taken into consideration
4. An analysis of the survey classification's position within the labor market when the cost of cash add-ons, health program costs, and retirement contributions are taken into consideration (total compensation)

The qualitative analysis will include the general trends and practices of benefits offered across the agencies summarized in tables and provided in an Excel file.

Subcategory: Employee Engagement

In each section below, we describe how we will deliver all required services. Because this will be a highly collaborative effort, we also identify what we propose the Agency's role will be in each phase.

1. Finalize and Plan Engagement Survey

After we have a solid understanding of the Agency's goals and critical issues, we will work with you to finalize the survey instrument and administration process. Our starting point will be CPS HR Institute for Public Sector Employee Engagement™ Survey, carefully constructed questions to measure engagement specifically in the unique environment of the public sector. CPS HR's Institute developed the standard survey questions based on national public sector surveys (U.S., U.K., Canada, Australia) and decades of research on employee engagement. The question selection process included several rounds of polling with a national sample of U.S. government and private sector employees, followed by factor analyses, reliability testing, and validity assessments. We can also help develop questions of interest to the Agency. We will work with the Agency to customize its survey to meet their needs.

Below, as an illustration, are the questions in our survey that comprise our engagement index. We will work with the Agency to finalize the survey, including the demographic questions they decide to include.

Employee Engagement Index (five-point response scale: "strongly disagree" to "strongly agree")

- I would recommend my organization as a good place to work
- I am proud when I tell others I am part of my organization
- I feel a strong personal attachment to my organization
- My organization inspires me to do the best in my job
- I feel comfortable being myself at work
- My organization motivates me to help achieve its mission.

Optional: We will also develop and include up to three open-ended questions.

We also provide a range of benchmarks, including from our online national survey of the U.S. workforce that represents a wide range of industries/occupations and geographic locations. This dataset, available exclusively to our clients, will allow NCTCOG's member agencies to compare their survey results (overall levels of engagement and question-by-question results) to the public sector as a whole; as well as to local government employees, the state and federal government workforces, and private-sector employees. Unlike many other engagement providers, we do not use our client data for benchmarks, and instead provide these high-quality benchmarks from our national poll.

In the section below, we describe the steps CPS HR's Institute will take to work with you to plan and conduct the survey and take action on the results. Unless identified as "optional," all the Institute steps described below are included in our standard package of services. Our optional services are listed and priced in the fee table.

To design the survey, the Institute will:

- Provide our recommended survey questions as a starting point.
- Agree with the Agency on the questions to include in the survey, including demographic questions (e.g., age, tenure), as well as any information tracked in the contact file. The contact file may include up to six organizational or demographic variables tracked on the back end (i.e., the information is linked to the respondent so that they do not have to answer the question in the survey).
- **Optional:** Agree on up to three open-ended narrative questions to include in the survey.
- Provide our communication guide and template, which includes communication suggestions and FAQs, to serve as a basis for a comprehensive communication strategy across the Agency's workforce. **Please note** that the Institute will provide templates and advice, but the Agency will need to finalize any communications.
- Provide instructions for IT to "allow-list" our email invitations to ensure our emails are not diverted due to SPAM filters or network firewalls.
- Program the survey. **Please note** that the standard package assumes an English-only survey.
- **Optional:** Provide a Spanish-language version of the survey.
- **Please note** that survey content is assumed to be an engagement survey with all participants receiving the same questions. This scope of work does not include other types of survey questions or different questions for different groups of employees (e.g., internal customer satisfaction, 360 assessments, or branching/customized logic).

The Agency will:

- Identify a single point-of-contact for the Institute who can make, or coordinate, decisions on this project.
- Work collaboratively with the Institute to finalize the survey, including deciding which demographic questions to include, as well as the open-ended questions to include.
- Decide on any question-level breakout reports (e.g., departments). For smaller units, we will incorporate their results into the Agency-wide report. Reporting needs must be identified at this stage. Results cannot be combined after the survey is conducted.

- Provide an Excel file with accurate employee contact information (name, work email address and organizational/work unit) for each employee. **Please note:** CPS HR's Institute needs to receive the final contact file and approved survey questions on the agreed upon due date. Any subsequent changes to this final contact list – such as additions, deletions or other edits – may incur additional charges at the rate of \$150/hour.
- **Optional:** If paper password invitations are required for employees who do not have work email addresses, they will need to be identified in the contact file. Each of these employees will receive a unique password in a paper invitation. This will allow employees without email addresses to access the survey using the survey link and their password.
- Communicate to employees the cut-off date and who will be included in the survey (e.g., employees who started after the final contact file was submitted will not be included in the survey).
- Communicate about the upcoming survey by all-staff email and other forums (e.g., meetings, posters).
- Work with the Agency's IT to "allow-list" our email domain to ensure our email survey invitations with survey links are not rejected/SPAM filtered.

Conduct the survey kickoff presentation to employees

Our Project Manager or Senior Project Consultant will conduct a survey kickoff presentation with employees and stakeholders you designate. On request, we will brief the Agency's leaders in advance of the survey kickoff presentation. Any presentations may be recorded and shared by the Agency.

During the kickoff presentation, we will discuss the survey and process. We will cover what engagement is, why it matters (the business case for engagement), and actions that other public-sector organizations have taken to improve engagement. We will also emphasize that individual employee survey responses will be confidential; and the importance of communicating across the entire Agency workforce to achieve a high response rate.

The material we cover will also focus on how improving engagement can help the Agency deliver the best possible services to its residents and stakeholders. Responsibilities to prepare for, and conduct, these meetings are as follows:

The Institute will:

- Review background information (e.g., strategic plan/goals) to inform the meeting agenda.
- Work collaboratively with the Agency to set the agenda.
- Conduct the kickoff presentation, which will focus on what engagement is, the business case for improving engagement, examples of actions taken by other public-sector jurisdictions, and the process the Institute and the Agency will use to conduct the survey and act on the results.
- **Optional:** Conduct the kickoff in person, at an additional cost.

The Agency will:

- Schedule the meeting, including inviting key leaders and other critical staff.
- Provide background information and feedback to help finalize the agenda.

2. Administer Survey

To administer the survey, the Institute will:

- Program and test the survey in Alchemer, our online survey administration platform. On request, we can provide technical information/specifications on the survey platform. **Please note:** if required, we can provide a 508-compliant accessible survey for respondents. Some survey question types, or administration techniques, may not be possible if the survey must meet high accessibility standards.
- Send an email invitation with the survey link to all Agency employees, and (if applicable) also provide a file with paper invitations for employees without Agency email addresses. Employees will be able to access the survey through desktop computers, mobile devices and smartphones. In the invitation, we will emphasize that each employee's responses will be confidential. CPS HR's Institute assumes all employees who have access to email or the paper invitation will be able to complete the survey online. **Please note:** This scope of work does not include a paper survey option.
- Provide an email address for employees to contact CPS HR with technical problems.
- Monitor and report on response rates during the survey period, and answer employee technical questions via email. CPS HR's Institute will provide two detailed response rate reports while the survey is being administered, and a final response rate report after the survey closes.
- Send reminder emails to employees who have not yet responded during the survey period.

The Agency will:

- Encourage employees to participate and, if necessary, answer any non-technical employee questions.
- If necessary, make arrangements (e.g., laptops or kiosks) for employees to complete the survey online.
- (If applicable) Print and distribute the paper invitations with passwords. These invitations will be addressed to individual employees. We strongly recommend that the Agency distribute these invitations directly to each employee and ask them to complete the survey immediately.

3. Analyze Results and Provide Recommendations

Our analytical approach applies a range of methods to identify strengths, opportunities for improvement and recommended actions. The CPS HR Institute will deliver a summary of findings report that includes Agency-wide summary scores for level of engagement (i.e., percent of employees who are fully engaged, somewhat-engaged and not engaged).

The Institute will also provide our proprietary benchmarks for overall engagement levels as well as for the individual questions in our survey. These benchmarks are for internal Agency use, to compare the views of Agency employees to other public- and private-sector employees, including in local government. **Please note** that our reporting will incorporate previous survey results as benchmarks if CPS HR's Institute conducted the survey. This scope of work does not include CPS HR analysis or inclusion of any other survey results not conducted by CPS HR.

We will also provide more detailed question-by-question results (i.e., percent positive, neutral and negative) for the Agency overall, and for any breakouts (e.g., departments) through our online tool. The tool will allow the Agency to review, sort and drill down on questions, compare results with various benchmarks, and download the results to Excel or PDF.

The Institute will use regression analysis to identify the questions that have the largest impact (i.e., the key drivers) on the Agency engagement score, provided there are at least 100 responses. We will provide one key driver analysis for the entire Agency.

Optional: We can also provide additional key driver analyses for any department/work unit with at least 100 responses.

In addition, if the Agency chooses to include up to three open-ended questions (an optional service), we will compile and report on the responses from the open-ended (verbatim) survey questions. **Please note** that we will report these open-ended responses un-edited, except we will redact names/self-identification only. Our reporting does not include qualitative or content analysis of the written responses.

CPS HR's Institute will also offer Agency-wide recommendations to take action on key questions from our resource library. These will range from no-cost quick wins to more comprehensive solutions. Our recommendations will be supplemented by lists of resources that include tools, templates, checklists, guides, videos, articles and even books on each key issue.

We believe it is important to share results with employees as soon as possible after the survey closes. Therefore, we will work with the Agency to plan how and when to share overall results with employees. We recommend sharing Agency-wide results with employees within six weeks of the survey closing date, if possible, and breakout results (e.g., departments or organizational units) soon after the Agency releases the overall results.

The Institute will:

- Provide access to our dynamic, online reporting tool that will allow the Agency to conduct deep dives into question-level results for Agency overall, and for each of the breakout groups.
- Produce a PowerPoint Agency-wide overview report.
- Conduct one key driver analysis to determine which survey factors and questions have the largest impact on the Agency-wide employee engagement score.
- Recommend specific actions to improve employee engagement from our recommendations library, linked to the Agency's overall survey results.
- **Optional:** At an additional cost, provide recommendations for action for the organizational units identified for breakout reports. These recommendations will be based on the unit results compared to the overall Agency results.
- **Optional:** Conduct additional key driver analyses for any units with at least 100 responses.
- **Optional:** Add the Agency's overall key driver weights to a unit's breakout report.
- **Optional:** Report the raw open-ended survey question responses with only names redacted.

The Agency will:

- Share the overall results and describe next steps to employees.
- Help protect the Institute's proprietary benchmarks.

- Complete our report access file to identify leaders who need access to the survey results reports. **Please note** that we prefer to grant access for all the identified leaders at one time. We cannot provide access on a rolling (one-by-one) basis. We also assume that only leaders involved in action planning will need access to the online tool reports.
- **Please note:** if any 508-compliant reports are required, the Agency will be responsible for converting any PowerPoint or PDF deliverables to meet its specific needs. The online reporting tool is not 508-compliant because it is dynamic and interactive.

4. Present Results and Take Action

Our Project Manager or Senior Project Consultant will present the Agency overall results in a webcast. On request, we will brief Agency leaders in advance of a presentation to all employees. Any presentations may be recorded and shared by the Agency.

Our analysis and reporting will reveal potential areas for the Agency to focus on to improve employee engagement. Due to the large amount of data and reports that we will deliver, we can help the Agency understand and take action on the survey results, and drill down on the survey results to identify strategies for taking action and improving engagement.

Results Discussions with Department Leaders – As an option, we can offer each department leader (or designee) a customized 1-hour meeting where we will orient them to our online reporting tool, discuss their results, and identify, in consultation with them, the survey questions they may wish to act on. After this meeting, we will send each leader a customized action plan report with a set of possible next steps for each question.

Individualized attention to a department leader's results, combined with our extensive experience advising on action planning, will enable leaders to quickly implement meaningful actions in response to the survey results. An important factor in any engagement initiative is to show employees that their time spent taking the survey was worthwhile because leaders listened and responded to their feedback.

The Institute will:

- Present results in a webcast.
- **Optional:** At additional cost, provide online meetings (1-hour) with department individual leaders over the course of one month. Our Project Manager or Senior Consultant will provide an overview of the department results, discuss next steps for action planning, and provide a customized recommendations report based on these conversations. The action plan recommendations report includes ideas to consider along with resources. This process is intended to be a starting point for action planning. Following each session, each department leader will need to develop and implement their plan.

The Agency will:

- Decide on the actions to improve employee engagement.
- Schedule any presentations or meetings, including inviting key leaders and other critical staff.
- Designate any participants for optional services, if held, coordinate scheduling and resources, and provide information and instructions to prepare for the sessions.

5. Provide Additional Follow-up Support

Other effective ways to follow up on survey results are to have action planning workshops, focus groups, and individual or team coaching for action planning implementation.

Action Planning Workshops – This structured workshop will help your leaders discuss key survey results and begin to develop action plans. We will provide templates and discuss common challenges. Following the workshop, leaders will need to finalize their own action plans. **Please note** that we use Microsoft Teams for this work. If the Agency prefers a different platform (e.g., Zoom), the Agency will need to provide technical support.

Focus Groups – These facilitated sessions allow small groups of employees to provide candid feedback on key areas highlighted in the survey results as important to the engagement of Agency employees. We will conduct the sessions, sort the confidential responses into categories and summarize the results in a PowerPoint slide deck.

Action Planning Implementation Support Services – For additional support, we assist individual leaders or teams with developing and implementing action plans. Our Senior Consultant will plan a series of five meetings to set goals for the action plan, discuss concerns, and provide guidance.

The Institute will:

- **Optional:** At additional cost, plan and conduct remote action planning workshops (two hours in length each, with up to 20 participants each) with designated Agency leaders and implementation teams to help develop specific actions to address issues identified in the survey.
- **Optional:** At additional cost, plan and conduct remote focus groups (90-minute sessions each, with 6 to 8 employees per group) to drill down on the results and develop recommendations from employees. We will then submit a summary PowerPoint report on these discussions.
- **Optional:** Implementation support services for individual leaders or teams.

The Agency will:

- Identify any implementation concerns and how the Institute may help.
- Schedule any presentations, meetings, or focus groups including inviting key leaders and other critical staff.
- Designate any participants for optional services, if held, coordinate scheduling and resources, and provide information and instructions to prepare for the sessions.

Subcategory: Recruitment

Key Stakeholder Involvement

The Hiring Authority on behalf of the Agency must be intimately involved in the recruitment and selection process. Our approach assumes their direct participation in key phases. At the discretion of the Hiring Authority, other key stakeholders may also be invited to provide input for the development of the candidate profile.

The Agency's Needs

A critical first step in a successful search is for the Hiring Authority to define the professional and personal qualities required of the Incumbent. CPS HR has developed a very effective process that will permit the Hiring Authority to clarify the preferred future direction for the Agency; the specific challenges the Agency is likely to face in achieving this future direction; the working style and organizational climate the Hiring Authority wishes to establish with the Incumbent; and ultimately, the professional and personal qualities required of the Incumbent.

Commitment to Communication

Throughout the recruitment and selection process, we are strongly committed to keeping you fully informed of our progress. We will collaborate with you to provide updates on the status of the recruitment via your preferred method of communication (phone conference, email, etc.).

We place the highest level of importance on customer service and responding in a timely manner to all client and candidate inquiries. Our previous clients and candidates have expressed a sincere appreciation for our level of service and responsiveness to the management of the recruitment process. As a result, we have many long-term relationships with clients that have led to opportunities to assist them with multiple recruitments.

Aggressive, Proactive, and Robust Recruitment

We take an aggressive approach in identifying and recruiting the best available candidates. There are those candidates who would gladly rise to the professional challenge and apply for positions within your organization; however, some of the best candidates are often not actively seeking a new position and may only consider a change once we present them with your opportunity.

Evoking the sense of vision and opportunity in qualified persons is among the responsibilities of CPS HR, and we pride ourselves in our efforts to reach the best available potential candidates. We directly email the outreach brochure, post messages, and connect with potential candidates on business media such as LinkedIn, and of course, pick up the phone and call qualified individuals and referral sources.

Diversity Outreach Process

As previously stated, CPS HR strives to attract the most highly qualified, diverse candidate pool possible. We are pleased that our diligent efforts have resulted in **more than 57%** of our executive level placements being people of color and/or female candidates within the past three years.

We accomplished this by advertising with organizations like the National Forum for Black Public Administrators and the Local Government Hispanic Network in order to reach these specific population groups. We also seek candidate referrals from local subject matter experts and the national leadership of groups like Women Leading Government. By taking the time to directly contact these influential industry experts, we ensure that we capture the maximum number of distinguished candidates – particularly those who are well-known in their industries, but who may not be actively looking for a new job.

The result is incredibly diverse candidate pools. Our clients have been quite pleased with our process and end results.

Scope of Work

Our proposed process is designed to provide the Agency with the full range of services required to ensure the ultimate selection of a new hire uniquely suited to the Agency's needs. We offer three levels of service:

- Full Recruitment – All Phases I-III
- Partial Recruitment – Phase I and II
- Outreach Only Services

The phases are described below.

PHASE I – Strategic Recruitment Plan

The first step in this engagement is a thorough review of the Agency's needs, culture, and goals; the recruitment and selection process; and the schedule. CPS HR is prepared to meet with key stakeholders to obtain input in developing the ideal candidate profile and to assist us in understanding key issues and challenges. Activities for this phase at each recruitment level will include:

Executive Search

- Foster client collaboration.
- Create a tailored plan for your agency and unique position.
- Review of job duties and compensation for marketability.
- Define ideal candidate profile with Hiring Authority and key stakeholders.
- Identify assessment needs.
- Conduct stakeholder engagement (surveys, focus group, community meetings).
- Leadership assessment

Middle Management/Specialized

- Collaborate with appropriate stakeholder(s) to define the ideal candidate profile for the position.
- Review of job duties and compensation for marketability.
- Identify testing/assessment needs.
- Coordinate with client on development of recruitment brochure for the desired position; prepare brochure design.
- Complete recruitment brochure and create posting in client applicant tracking system or CPS HR's applicant tracking system (NEOGOV).

PHASE II – Marketing and Applicant Screening

The recruitment process is tailored to fit the Agency's specific wants and needs, with targeted advertising, combined with personal contacts with qualified individuals from our extensive database.

CPS HR will prepare, submit for your approval, and publish advertisements in appropriate magazines, journals, newsletters, job bulletins, and websites to attract candidates on a nationwide, regional, local, or targeted basis based on the recruitment strategy. CPS HR is focused on reaching a diverse candidate pool and would recommend publications/websites that are targeted to minority and female candidates.

CPS HR would execute the following tasks for this phase at each recruitment level including:

Executive Search

- Create an attractive and informative electronic flip book type of brochure to market the position.
- Conduct targeted research to identify ideal passive candidates.
- Execute active and passive sourcing of candidates through e-mail, phone, and social media.
- Devise advertising and marketing strategy.
- Develop innovative media campaigns.
- Review applicant resumes and ensure minimum qualifications are met.
- Conduct comprehensive preliminary phone screening interviews.
- Submit “Client Report” (including summary of recruitment activities and candidate applications and/or resumes) to include list of qualified candidates.
- Meet with the Agency to discuss the report and the results of the preliminary phone screening interviews in order for the Agency to identify candidates to invite to oral panel interview.
- Provide client with updates of recruitment status during application period.
- Respond to applicant inquiries and manage applicant communication.

Middle Management/Specialized

- Identify ad sources relevant to the position and coordinate the placement of agreed upon ads.
- Conduct active and passive sourcing of candidates through e-mail, phone, social media, and outreach tools/referral sources.
- Review all applicants against the minimum qualifications for the position within designated applicant tracking system ensuring appropriate disposition is captured.
- Develop and administer secondary rated screening or conduct preliminary phone screening interviews.
- Submit “Client Report” (including summary of recruitment activities and candidate applications and/or resumes) to include list of qualified candidates.
- Meet with the Agency to discuss the report and the results of the secondary rated screening or preliminary phone screening interviews in order for the Agency to identify candidates to invite to oral panel interview.
- Provide client with updates of recruitment status during application period.
- Respond to applicant inquiries and manage applicant communication.

PHASE III – Selection

CPS HR will design a selection process based on information gathered in Phase I. We will meet with the Agency to review this process and discuss the Agency's preferred approach in assessing the final candidates. We can coordinate all aspects of the selection process for the Agency. This includes preparing appropriate materials such as interview questions, evaluation manuals, and other assessment exercises; and facilitating the interviews.

CPS HR will be available to complete the following components of this phase at each recruitment level:

Executive Search

- Develop and facilitate all required selection processes including development of interview questions and/or assessments.
- Coordinate all candidate communication and scheduling.
- Train interview panel and handle onsite facilitation of interview process.
- Execute extensive background and reference checks.
- Provide assistance with contract negotiation.
- Facilitate appointment of selected candidate.
- Prepare a written report that summarizes the results of the recruitment process.

Middle Management/Specialized

- Develop interview questions including rating criteria and/or other requested selection tools.
- Develop and facilitate training of oral exam interview panel for the client's interview process.
- Coordinate all candidate communication and scheduling.
- Prepare interview evaluation materials.
- Facilitate oral panel exam interview and final hiring interview process.
- Conduct professional reference checks and/or background checks, upon request.
- Facilitate appointment of selected candidate upon request.

Outreach Services

Task 1 - Review and Finalize the Recruitment Process and Schedule

The first step in this engagement is a thorough review of the following with the Hiring Authority:

- Understand the Agency's needs, culture, and goals.
- Discuss recruitment outreach process efforts to date, so we complement rather than duplicate efforts.
- Develop a schedule aligned with the recruitment process.

This will ensure that the Agency's needs are met in the most complete manner possible.

Task 2 - Candidate Profile and Recruitment Strategy Development

This task will be accomplished during a discussion involving the relevant Agency stakeholders and CPS HR. It will result in the identification of the personal and professional attributes required for the position and will include the following activities:

- Development of a recruitment brochure, inclusive of photos that will highlight the unique benefits and favorable conditions that would attract a new incumbent. In this way, we can draw attention to the reasons why your position and region would be a great opportunity for a candidate.
- CPS HR will identify and provide the Agency with a list of suggested advertising sources which may not have been considered previously to reach the best candidates.

CPS HR is focused on reaching a diverse candidate pool and would recommend publications/websites that are targeted to minority and female candidates.

Task 3 - Targeted Outreach

CPS HR will prepare an email distribution list containing prospective candidates and referral sources gleaned from our database and new research in targeted regional areas as well as with other public sector organizations. This will include a regional and statewide search. These individuals will receive a link to the recruitment brochure, along with a personal invitation to contact CPS HR should they have any questions about the position.

Based upon CPS HR's research and contact with prospective candidates, including the use of LinkedIn, CPS HR will also make personal phone calls to prospective applicants we identify as the most promising based on the candidate profile and requirements of the position.

Task 4 – Report

CPS HR will prepare a report summarizing all outreach activities. The report will contain a listing of all advertisements placed as well as all active and passive outreach efforts completed inclusive of how many candidates were targeted in each effort.

Our Placement Guarantees

Executive Search Recruitment One-Year Service Guarantee

If the employment of the candidate selected and appointed by the Agency as a result of a **full executive recruitment (Phases I, II, and III)** comes to an end before the completion of the first year of service, CPS HR will provide the Agency with professional services to appoint a replacement. Professional consulting services will be provided at no cost. The Agency would be responsible only for expenses such as re-advertising, consultant travel, additional background checks, etc. **This guarantee does not apply to situations in which the successful candidate is promoted or re-assigned within the organization during the one-year period.** Additionally, should the initial recruitment efforts not result in a successful appointment, CPS HR will extend the aggressive recruiting efforts and screen qualified candidates until an offer is made and accepted. CPS HR does not provide a guarantee for candidates placed as a result of a partial recruitment effort.

Middle Management Recruitment Six Month Service Guarantee

If the employment of the candidate selected and appointed by the Agency as a result of a **full middle management recruitment (Phases I, II, and III)** comes to an end before the completion of the first six (6) months of service, CPS HR will provide the Agency with professional services to appoint a replacement. Professional consulting services will be provided at no cost. The Agency would be responsible only for reimbursable expenses. **This guarantee does not apply to situations in which the successful candidate is promoted or re-assigned within the organization during the six (6) month period.** Additionally, should the initial recruitment efforts not result in a successful appointment, CPS HR will extend the aggressive recruiting efforts and screen qualified candidates until an offer is made and accepted. CPS HR does not provide a guarantee for candidates placed as a result of a partial (*Phase I & II*) recruitment effort.

Subcategory: Training

Following are our approaches and methodologies to Training and Development.

Our Partnership with You

CPS HR becomes a partner with our clients to develop effective solutions to meet desired outcomes. We design creative and relevant engagements for training, coaching, facilitation, or consulting services. We develop effective measures to track participant success in transferring learning and development opportunities into enhanced on-the-job performance. Our project management, practical, learner-centered approach, and quality control mechanisms set us apart and drive the success of our programs.

Project Management

CPS HR's approach to any training and development project is built on developing a productive working relationship with our clients and ensuring our work product is based on adult learning principles, is designed to be experiential and facilitative, and is applicable back on the job.

We are concerned about making sure you receive the training that is needed. To ensure that, the Project Manager, Karen Evans, will monitor the project in the following ways:

- Check-in with an Agency point of contact at intervals during the engagement
- Review the course evaluation scores and comments
- Debrief with the instructor/coaches on a regular basis

In the event that an instructor or coach is not successfully performing the required services, the Project Manager will engage in the following remediation activities:

- Engage in constructive feedback conversations with staff based on subpar evaluations, participant feedback, or point of contact/other stakeholder feedback
- Adjust curriculum, method, or assessment tool
- Remove a staff member from an assignment

When working with our clients on a training and development engagement, we manage the project from start to finish. Our Project Manager serves as the lead and primary point of contact and will be responsible for regular and periodic communications, scheduling the courses or other development activities, overseeing the trainers/consultants/coaches, ensuring any needed adjustments are made, communicating any changes, and all reporting. Ms. Evans, in concert with other CPS HR staff, will provide immediate feedback to the Agency Project Manager regarding all customer requests for new or additional services or to lodge complaints.

Upon contract award, CPS HR will convene a stakeholder meeting to further define the Agency's expectations, discuss timelines and schedules, review curriculum, discuss any needed customization, and outline tasks and responsibilities.

Scheduling will be based on the Agency's need and coordinated by the Project Manager with an Agency point of contact. We can provide classes at the Agency's location in-person or as live, virtual instructor-led training. If in-person, the Agency will provide the venue with tables, chairs, and equipment such as an LCD projector, and a laptop. If virtual, CPS HR will utilize our delivery platform, Zoom or MS Teams, to deliver the training.

Prior to each event, our trainer will contact the Agency point of contact to confirm logistics and discuss any final details. CPS HR will brief our instructors prior to the delivery of any training on the Agency's location policies and procedures, including emergency procedures, non-competition agreements, ergonomics, paper conservation, evaluations, and sign-in rosters. **Course materials are all electronic.**

If in person, on the day of the event, our trainer will arrive 30 minutes prior to the start time to set-up. For a scheduled session, the instructor will incorporate appropriate breaks and adjust times to meet the needs of the audience. The CPS HR instructor shall provide the training for the entire time allocated for each class unless otherwise instructed by the Agency. The trainer is responsible for obtaining signatures on the roster and providing the original to the Agency. If virtual, the instructor will be online a minimum of 15 minutes in advance of the scheduled start time.

Upon course completion, the link for the online course evaluation will be sent to each participant. Electronic Certificates of Completion will be sent following verification of successful course completion. Participant comments are used to evaluate and improve any future class offerings.

Learner-Centric Training and Development

CPS HR's approach to learning and development is well-aligned to the Agency's training and development principles of:

- Clear Leadership Commitment
- Effective Content that is Well Designed
- Engaging Delivery
- Online Delivery

CPS HR's learning and development approach and philosophy is one of life-long learning focused on the learner, supporting growth and development at every stage in their career – from first job through job transitions and promotions. Our methodology is grounded in adult and active learning principles and engages learners in practical, application-based curriculum that can be immediately applied back on the job – learn today, apply tomorrow.

Online, self-paced and live virtual training, mixed with instructor-led classroom training is a powerful blend of delivering learning experiences that are meaningful and impactful, and that make the best use of instructor expertise and technology.

We are committed to continuous improvement and actively use the formal and informal feedback from training classes and programs to adjust and improve delivery and content. Our mindset is to try new approaches and to test and pilot. When we deliver less than expected, we learn from those missteps and grow and improve.

Learning and Development Methodology

CPS HR's approach to learning and development is grounded in adult learning principles (Knowles, Holton and Swanson, 2015)⁶ within a framework of active learning. Our instructors are skilled in the use of active learning using multiple and varied approaches to training to engage participants in the training course/program. Our courses are highly interactive and participatory, and de-emphasize lecture with a learner-centered approach utilizing:

- Case Studies and Scenarios
- Paired and small-group work
- Dialogue, Debate, Small Group and Whole Group Discussion
- Check Your Knowledge quizzes and assessments, and more
- Experiential learning
- Problem-based learning

We understand that adult learners need to be actively involved and engaged in their professional development. Our expert instructors promote dialogue, reflection, and application in their integrative approach leading engagement in the material and retention. They understand that to involve participants in the learning experience, learning must:

1. Be relevant to the experience and/or prior knowledge of the participant
2. Engage learners in exploration and discovery
3. Ask learners to actively apply and practice the content with a case study, simulation or other activity where they transfer and apply concepts, ideas, and content
4. Be learner-centered where participants are applying and transferring material to solving real-world, relevant situations

In designing curriculum, CPS HR utilizes the ADDIE model of instructional design in conjunction with backwards design and incorporates varied curricular and instructional activities (Gardner, 1993; Gagne, 1985; Dunn, 2000; Kolb, 1984)⁷ and presentation methods to accommodate learning styles and preferences and level of training.

⁶ Knowles, M. S., Holton, E.F., & Swanson, R. A. (2015). *The Adult Learner: The definitive classic in adult education and human resource development* (8th Ed). New York: Routledge.

⁷ Dunn, R. (2000). Learning styles: Theory, research, and practice. *National Forum of Applied Educational Research Journal*, 13 (1), 3-22.

Gagne, R. (1985). *The Conditions of Learning* (4th Ed.). New York: Holt, Rinehart & Winston.

Gardner, H. (1993). *Frames of mind: The theory of multiple intelligences*. New York: Basic Books.

Kolb, D. A. (1984). *Experiential Learning: Experience as the Source of Learning and Development* (Vol. 1). Englewood Cliffs, NJ: Prentice-Hall

Quality Control and Evaluation of Training

CPS HR's process to evaluate program success and effectiveness is modeled on Kirkpatrick's (2016)⁸ four-step training evaluation model. CPS HR will develop an evaluation process in collaboration with the Agency to assess: (i) Reaction to the training; (ii) Learning; (iii) Behavioral changes (need as determined by the Agency); and (iv) Impact of the training (on organizational results) (need as determined by the Agency).

1. The first step includes immediate feedback after each training session. This will be accomplished through a survey at the end of each training session. The survey may ask participants about the instructor, the materials, how the training could be improved, etc. Our goal is 4.5 on a scale of 1-5 with 5 being the highest rating.
2. The second step includes transfer of learning. In this step, we want to assess changes in knowledge, skills and/or attitudes. The learning outcomes for the training course are the starting point for this evaluation step. One way this might be evaluated is through a pre- and post-assessment.
3. The third step is to develop a strategy to monitor and evaluate the effectiveness of the training in the long-run through application of skills 'back on the job' in professional practice. This might be accomplished with a follow-up survey, three to six months after the cohort training program or might also encompass interviews or observations.

This higher-level evaluation looks at: (i) Is the training being put to use? (ii) Are participants able to teach their new knowledge to others? (iii) Is there an awareness, by the trainee, that their behavior has changed?

4. The fourth step involves evaluating results – impact on the organization. This step is time-consuming and costly. A key to success to the fourth level of evaluation is determining, at the outset, the business or organizational results to evaluate. Outcomes to consider might include: (i) Higher morale; (ii) Increased customer satisfaction or fewer complaints; (iii) Higher quality; and (iv) Improved employee retention.

NCTCOG member agencies are fortunate to have in their backyard a training agency with full service consulting and training services for public sector clients. As our Course Catalog reveals, CPS HR offers training on all the topics for which you are requesting services, each of which can be customized to your on-site training requirements. You can view a copy of our current catalog using the following link: [2023-2024 CPS HR Training Catalog](#).

This distinctive combination of sound experience and availability of services provides a tremendous advantage to the Agency who can draw on a large and highly qualified cadre of certified trainers and consultants particularly adept at tailoring training topics to fit your needs. In addition to the executive coaches, trainers, and consultants available to you from our Northern California office, CPS HR partners nationally with other experts to draw upon to further customize your particular training or organizational development needs.

⁸ Kirkpatrick, J. D., and Kayser-Kirkpatrick, W. (2016). *Kirkpatrick's Four Levels of Training Evaluation*. Association for Talent Development.

Offering services exclusively to public sector agencies, CPS HR has substantial experience working with cities and counties throughout California; the State of California, special districts, and other public service agencies. This gives us tremendous insight into the complexities and challenges inherent in all government operations that translates into relevant curriculum and instructional delivery.

Subcategory: Testing and Assessment

Produce Written Exams

CPS HR understands that during the course of this project, we may provide employment exams to the Agency that will determine the knowledge, skills, and abilities for each job candidate and position being tested.

CPS HR's test rental catalog offers more than 50 types of multiple choice entry-level and promotional employment tests for a wide range of public agency positions including public safety (i.e., fire service and law enforcement), clerical, professional, skilled trades, and other para-professional positions. These exams are developed to meet the most stringent psychometric standards and are frequently updated to ensure content relevance as well as to prevent overexposure. They can easily be administered online, and we can provide options for remote proctoring of online exams.

Our team will work with you to help create tests that measure the potential success of your candidates. When ordering tests, job analysis data should help you select the appropriate test for the job. CPS HR will work closely with Agency personnel in reviewing test materials to ensure relevancy to the position in question. This may include the Agency reviewing materials with incumbent subject matter experts as well as collecting job analysis data to support the use of the testing material for the specific positions. In all phases, CPS HR consultants will be available to assist with professional guidance to ensure a high quality, professionally acceptable test process.

- **Free Review Copies.** At any time prior to ordering, CPS HR will provide copies of the exam for the Agency to review for job relatedness.
- **Printing and Delivery.** CPS HR will print and deliver the examinations and other materials (proctor's report, proctor's manual, scoring manual, answer sheets, etc.).
- **Online Testing.** Exams are available to administer online if the Agency prefers.
- **Test Rental and Scoring.** CPS HR will score all exams administered by the Agency and will provide relevant statistical data and reports, including special reports requested by the Agency. All score reports will be provided via email within 48 hours; score delivery can be expedited upon request. If the Agency prefers to score on-site, a key sheet or plastic scoring overlay will be provided.
- **Test Development and Validation.** CPS HR prides itself on exceeding the highest professional standards for its exams. All CPS HR stock exams are based on a content validation approach. The tests developed for and provided to the Agency will conform to all applicable state and federal laws for test development and validation.
- **Pass Point Setting.** Prior to the administration of the written examination, CPS HR can assist the Agency with developing a suggested pass point by using an Angoff procedure.

Online (Electronic) Exams

Online test format is available for most examinations. Online exams are designed to be administered in a proctored setting. Benefits of our online testing program include:

- Easy materials handling - no hard copies to ship, track, and inventory
- Automated scoring for easy and fast results
- Online and/or in-person proctoring

REMOTE PROCTORING

If you do not have access to a bank of computers, CPS HR has a partnership to provide remote proctoring, which uses a webcam to enable live proctoring of an online exam from a place of the candidate's choosing.

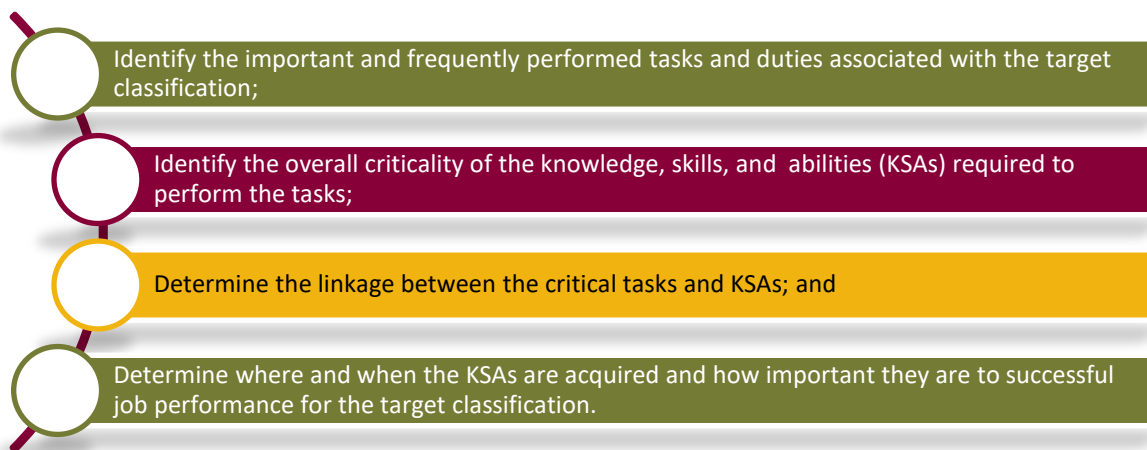
UNPROCTORED TESTS

CPS HR offers a limited number of tests that are available to be administered in an unproctored setting.

Job Analysis

While there is no single correct method for conducting a job analysis, certain requirements must be met if the results of the job analysis will be used for making employment decisions, including establishing criteria for applicant screening, hiring, promotions, and job training. The process outlined below follows all applicable legal standards and best practice in the field of employment selection, most notably, the federal *Uniform Guidelines on Employee Selection Procedures*.

CPS HR's experience with job analysis is extensive, typically following a task-based methodology (designed to comply with all prevailing technical standards and legal guidelines) that ensures completeness and legal defensibility such that the job analytic data can withstand scrutiny of challenge and/or question as to its application in any testing process. CPS HR has used this task-based methodology with literally hundreds of state and local government clients. For purposes of this proposal, it is assumed that the job analysis will generally follow this methodology. The purpose of a job analysis is to do the following:



In accordance with best practice as outlined above and in the *Uniform Guidelines on Employee Selection Procedures*, the following job analysis steps, for each classification level, will be performed for the Agency.

Step 1 – Review of Background Materials

CPS HR will request background information such as classification specifications, duty statements, job descriptions, organizational charts, and any other relevant documentation relating to the classifications under study. Information contained in these documents will be used to gain an initial understanding of the classifications to guide the data collection process, and to develop draft lists of task and KSA statements.

Step 2 – Incumbent Interviews

CPS HR will conduct phone interviews with a sample of current job incumbents and/or supervisors to obtain information regarding typical job duties, job requirements, and the work context. The information obtained in these interviews will be utilized to revise the draft lists of task and KSA statements, per classification, as necessary. The number and extent of these job interviews depends on the variability in the work performed across the incumbent populations, the number of different functional areas or working titles within a classification, the availability of job incumbents to participate, and the extent to which these activities can occur with little disruption to the interviewee's work.

Step 3 – Statement Development with Subject Matter Experts

CPS HR will meet (virtually) with a group of SMEs, per classification title, to review and finalize the task and KSA statements developed in Step 1 and revised after Step 2. A group of SMEs typically consists of approximately four to six current job incumbents and approximately two first-level supervisors; however, this will be tailored as necessary to ensure adequate representation based upon the number of incumbents within each of the classifications. CPS HR consultants will work with LACERA to identify appropriate SMEs. There will be a need for up to three meetings per classification title for this endeavor. Follow up via email or phone with the SMEs may be necessary to finalize the task and KSA statements.

Step 4 – Develop a Job Analysis Questionnaire

CPS HR will develop a job analysis questionnaire, per classification, to obtain ratings of the task and KSA statements finalized in Step 3. The task statements are rated on numerical rating scales according to the frequency with which the tasks are performed on the job, and the importance of each task to overall job performance. The KSA statements are rated according to how important each KSA is for successfully performing the job, and whether each KSA is needed upon entry into the classification, or if it can be learned over time on the job. KSA statements are also rated on whether possessing more of the KSA would lead to better performance on the job.

Step 5 – Distribute the Questionnaire

The job analysis questionnaire, per classification, will be distributed via a web-based survey platform to all incumbents and first-level supervisors to ensure that all incumbents and first-level supervisors have the opportunity to provide input, and to better ensure a representative sample in the final data set.

Step 6 – Questionnaire Data Analysis

CPS HR will analyze the questionnaire rating results using statistical procedures to determine the percentage of incumbents performing each task, the frequency with which the tasks are performed, the relative importance of job tasks and KSAs, and which KSAs are needed upon entry or promotion, and therefore, appropriate to use in selection processes, per classification.

Step 7 – Linkage Analysis

A linkage analysis is a specific requirement set forth in the *Uniform Guidelines on Employee Selection Procedures* for demonstrating the content validity of selection processes resulting from job analytic results. CPS HR consultants will identify all of the KSAs that are assumed to be necessary for performing each of the retained tasks. These preliminary task-KSA linkages will be presented to a group of SMEs in a virtual meeting, and the SMEs will be asked to review the preliminary linkages to determine their accuracy, and to add additional linkages as necessary. This meeting will last approximately one hour, per classification, with an additional approximate two to three hours asked of the SMEs for an independent review of the linkage materials.

Step 8 – Job Analysis Report

CPS HR will prepare a final report, per classification, fully documenting the job analysis process and containing all results of the job analysis. The report will conform to the specific documentation requirements stated in the federal *Uniform Guidelines on Employee Selection Procedures* for establishing the integrity of the job analysis data and for demonstrating the content validity of tests subsequently developed on the basis of the job analysis results.

Project Activities Schedule

Service Category #1: Consulting Services

The CPS HR Internal Project Manager and the client will discuss varying approaches to customize a timeline after the initial kick-off meeting. CPS HR recommends a structured timeline that can be flexible to accommodate varying factors in achieving set milestones.

Our classification study timelines are based upon the assumption that

- The client is able to enforce orientation, PDQ deadlines, and the interview schedule within the designated timeframe
- The client will be able to review, comment on, and approve study products within agreed upon deadlines
- Upon full contract execution, CPS HR is available to begin the work upon full contract execution after a mutually-negotiated date

Our compensation timelines are based upon the assumption that

- Selected labor market agencies will provide the information required within the specified timeframe
- The client will be able to review, comment on, and approve study products within agreed upon deadlines
- The compensation study will begin after the classification specifications resulting from the classification study have been finalized

We understand the urgency and importance of these initiatives, and we are committed to working diligently to expedite timelines wherever feasible, leveraging our expertise and resources to ensure that projects stay on track. While external factors may introduce complexities, our proactive approach allows us to streamline processes, delivering results in a timely manner.

Classification Plan

Classification Plan - Sample Timeline (Not an Exact Timeline)	Week #'s
Receive and Review Client's Background Materials; Internal Project Set-up	1-3
Initial Project Meeting with Client	4
Develop Job Evaluation Tool; Obtain Approval from Client and Finalize; Program PDQ parameters	5-6
Conduct Orientation(s) with Participants; Distribute Link to PDQ	7
PDQ Completion Window by Incumbents	8-10
Receive and Inventory PDQs/Implement Supervisor Review and Approval Process	11-13
Review Completed PDQs and Supervisor Comments; Select Interviewees and Develop Questions	14-16
Send Link to Incumbents for Interview Scheduling	17-18
Conduct Incumbent Job Evaluation Interviews; Select Supervisors for Interviews	19-21
Send Link to Supervisors for Interview Scheduling	22
Conduct Supervisor Interviews	23-24
Analyze Classification Data	25-26
Present Draft Preliminary Findings	27
Client Review, Commentary, and Approval	28
Revise Classifications Specifications	29-32
Client Review Period of Draft Classification Specifications	33-35
Finalize Classification Specifications	36-37
Create Incumbent Allocations	38-39
Client Review Period of Incumbent Allocations; Finalize	40-41
Prepare, Submit, and Present Classification Report	42-43

Compensation Plan

Compensation Package Review - Sample Timeline (Not an Exact Timeline)	Week #'s
Receive and Review Client's Background Materials; Preliminary Discussion of Possible Labor Market Agency Pool and Benchmark Selection; Conduct Research	1-3
Initial Project Meeting, Labor Market Agency and Benchmark Selection	4
Design, Develop, and Distribute Survey Instrument	5
Collect and Validate Labor Market Survey Data	6-8
Conduct Job Matching	9-11
Client Review and Feedback of Matches, Finalize and Obtain Client Approval	11-13
Design and Develop Data Spreadsheets	14-15
Conduct Internal Equity Analysis/Prepare Draft Salary Recommendations	16-17
Prepare Draft Compensation Report	18-19
Client Review of Draft Compensation Report and Salary Recommendations/Provides Feedback, Finalize and Obtain Client Approval	20-21
Research and Resolve Issues/Prepare and Present the Final Compensation Report	22

Service Category #2: Optional Ancillary Services

Subcategory: Full Compensation Package Review

Full Compensation Package Review

Compensation Package Review - Sample Timeline (Not an Exact Timeline)	Week #'s
Receive and Review Client's Background Materials; Preliminary Discussion of Possible Labor Market Agency Pool and Benchmark Selection; Conduct Research; Discuss Benefits Elements	1-3
Initial Project Meeting, Labor Market Agency and Benchmark Selection	4
Design, Develop, and Distribute Survey Instrument	5
Collect and Validate Labor Market Survey Data	6-8
Conduct Job Matching	9-11
Client Review and Feedback of Matches, Finalize and Obtain Client Approval	11-13
Design and Develop Data Spreadsheets	14-15
Conduct Benefits Analysis	16
Conduct Internal Equity Analysis/Prepare Draft Salary Recommendations	17-18
Prepare Draft Compensation Report	19-20
Client Review of Draft Compensation Report and Salary Recommendations/Provides Feedback, Finalize and Obtain Client Approval	21-22
Research and Resolve Issues/Prepare and Present the Final Compensation Report	23

Subcategory: Employee Engagement

Phase	Included Services (Standard Package)	Optional Services
1. Finalize and plan engagement survey, conduct kickoff presentation (Weeks 1 – 6)	<ul style="list-style-type: none"> Tailor and finalize the survey and process Develop survey plan and milestones Provide communication guide Program the survey in English Conduct one webcast kickoff presentation 	<ul style="list-style-type: none"> Include up to 3 open-ended questions Conduct additional kickoff presentations Conduct in-person kickoff presentation (instead of webcast)
2. Administer survey (Weeks 6 – 8)	<ul style="list-style-type: none"> Launch survey by sending email invitations with individual survey links to all employees Monitor response rates and send 3 response rate reports Send email reminders to employees Answer employee technical questions via email 	<ul style="list-style-type: none"> Provide password invitations for employees without work email addresses (agency to print and distribute)
3. Analyze results/provide recommendations	<ul style="list-style-type: none"> Provide results reports (summary of findings PowerPoint and any organizational/work unit question-level reports included in the standard package) 	<ul style="list-style-type: none"> Deliver additional breakout reports

Phase	Included Services (Standard Package)	Optional Services
(Weeks 9 – 14)	<ul style="list-style-type: none"> Provide 1 agency-wide key driver analysis Provide action recommendations for the agency overall 	<ul style="list-style-type: none"> Provide additional key driver analyses Provide additional customized recommendations reports (no meeting included) Provide results discussion meeting and customized recommendations report
4. Present results and take action (Week 15)	<ul style="list-style-type: none"> Present results via webcast 	<ul style="list-style-type: none"> Conduct additional results presentations (webcast) Present results in person (instead of webcast) Provide results discussions and customized recommendations
5. Provide additional follow-up support (Weeks 16 – 24)	<ul style="list-style-type: none"> N/A 	<ul style="list-style-type: none"> Deliver action planning workshops Conduct focus groups Implementation support for an individual leader (5 remote meetings, with preparation and follow-up time)

Subcategory: Recruitment

The project team CPS HR has selected is prepared to begin work upon receipt of a fully-executed contractual agreement. Depending on the recruitment level selected, recruitment and selection activities can be completed in two to four months. The precise schedule will depend on the placement of advertising in the appropriate professional journals, and the ability to schedule, as quickly as possible, the initial client kick off meeting. A proposed schedule of major milestones is presented below.

Full Recruitment Timeline:

Task Name	Phase I			Phase II								Phase III				
Weeks	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16
Executive Search																
Middle Management/ Specialized																

Partial Recruitment Timeline:

Task Name	Phase I			Phase II						
Weeks	1	2	3	4	5	6	7	8	9	10
Executive Search										
Middle Management/ Specialized										

Subcategory: Training

Sample Work Plan and Schedule

CPS HR can schedule an off-the-shelf course in as little as eight weeks upon a fully executed contract with the Agency. For a customized course or other development activity, 12 – 16 weeks is realistic depending on the amount of customization required.

Following is a sample work plan illustrating how CPS HR will work with the Agency to design, develop, and deliver a training program or series of courses.

Sample Work Plan: Training

Task	Deliverable
Phase 1: Scheduling and Curriculum	
1. Kick-off meeting with the Agency and CPS HR to define expectations, review desired courses, discuss goals and learning objectives, and discuss timeline and schedules	<ul style="list-style-type: none"> Proposed work plan Course materials for review
2. Curriculum/Content Meetings (as needed) <ul style="list-style-type: none"> Set up meetings with stakeholders to gather additional information needed to tailor curriculum Ensure courses meet the learning objectives, current, easy to navigate and use in the classroom 	<ul style="list-style-type: none"> Draft curriculum
3. Work with the Agency to tentatively schedule of classes or other services	<ul style="list-style-type: none"> Draft schedule
4. Any needed curriculum changes are completed	<ul style="list-style-type: none"> Finalized curriculum
Phase 2: Prepare for Training Program	
1. Schedule courses	<ul style="list-style-type: none"> Final course schedule
2. Electronic course materials are produced and made available to the Agency for dissemination to participants	<ul style="list-style-type: none"> Quality course materials
3. Instructor contacts the Agency contact 5 to 7 days prior to the training day to confirm logistics and dissemination of course materials	<ul style="list-style-type: none"> E-mail/phone communication
4. Instructor preparation	<ul style="list-style-type: none"> Prepared instructors
Phase 3: Deliver Program	
1. CPS HR instructor sets up equipment needed for the course, i.e. laptop and projector (if in-person training)	<ul style="list-style-type: none"> A prepared classroom
2. Deliver class sessions as scheduled	<ul style="list-style-type: none"> Successful delivery of class
3. Approved training roster is completed (if in-person); Virtual platform attendance record.	<ul style="list-style-type: none"> Completed roster

Task	Deliverable
Phase 4: Class Completion Activities	
1. Disseminate Training Evaluation link or QR code to each student before the completion of the class	• Completed end of course evaluations
2. Distribute Electronic Certificates of Completion	• Distributed certificates
3. Instructor to tidy room (if in-person)	• Clean training room
Phase 5: Manage and Administer Program	
1. CPS HR project manager will engage in regular and periodic communications	• Feedback sessions • Reports if requested
2. Update material (as needed)	• Up to date training materials

Subcategory: Testing and Assessment

Produce Written Exams

Typical ordering time for off-the-shelf exams is 10-15 business days prior to the test date. The agency ordering exams must have a Test Rental Agreement on file to place a test order. If the agency chooses to have CPS HR score the examination, scores will be provided within 2 business days of receipt of answer sheets (online exam scores can be provided immediately after candidate submission).

Job Analysis

Step 1 – Review of Background Materials

Typical Completion Time: One to two weeks, per classification title.

Step 2 – Incumbent Interviews

Typical Completion Time: Approximately two weeks for all classification titles, depending on the number of interviews, and interviewee's availability.

Step 3 – Statement Development with Subject Matter Experts

Typical Completion Time: Two weeks per classification, depending on SME availability.

Step 4 – Develop a Job Analysis Questionnaire

Typical Completion Time: Questionnaire development one week, per classification title.

Step 5 – Distribute the Questionnaire

Typical Completion Time: Approximately two weeks, per questionnaire. The questionnaire response period may have to be extended until the response rate meets an acceptable response rate that ensures sufficient representation of the classification under study.

Step 6 – Questionnaire Data Analysis

Typical Completion Time: One to two weeks, per classification depending on the complexity of the data and responses.

Step 7 – Linkage Analysis

Typical Completion Time: One to two weeks, per classification, depending on SME availability.

Step 8 – Job Analysis Report

Typical Completion Time: Two weeks per report.

- c. **Provide a detailed description of the firm’s approach to overall project management, allocation of resources, and integration of all activities potentially required by the Scope of Work.**

Project Management Approach

CPS HR is convinced that the key ingredient to a successful consulting assignment is an effective combination of sound project management procedures, high-quality project team members, and good customer service. Effective project management is required to provide for the orchestration and timely flow of activities, an ongoing feedback and adjustment mechanism, and the judicious use of time. Our project management process includes three primary components.

- Providing ongoing monitoring and control of project activities. Unforeseen developments or changes in circumstances may warrant changes in emphasis, revisions to the approach in certain areas, or other modifications of planned work activities. Active project management provides greater assurance that such redirection will occur when warranted by circumstances.
- Ensuring the optimum management of the time available to complete the project. Effective time management is a skill required of experienced professionals. Sound project management can optimize the overall effectiveness of the project team's efforts and provide a greater assurance of meeting milestones and budgets.
- Providing for the continuous reinforcement of the project's objectives. A major role of project management is to ensure that the consulting team consistently adheres to the proper perspective in facilitating the project.

CPS HR is dedicated to the commitment of its full complement of resources for the success of all projects. The team members who will be working on this project will be readily accessible and are committed to meeting all deadlines and scheduled timeframes.

Provide Oversight and Quality Assurance

We are committed to meeting the highest professional standards of quality. Team members are selected for their relevant experience and professional maturity in dealing with project environments such as this. Each will spend an appreciable portion of his or her effort in the review, constructive challenge, and direction of assigned responsibilities.

Our quality assurance procedures include executive level and/or independent peer review of results and progress on a scheduled basis by senior professionals or technical advisors. These individuals provide a critical challenge to the direction and results of project efforts to ensure the project is comprehensive in its breadth and thorough in its depth.

Peer review of engagement reports and documentation is critical to our success. At least one knowledgeable person other than the consultant preparing the document/product must review, critique, and understand the document/deliverable before it is considered ready for delivery to the client. CPS HR's Project Manager is directly involved in preparing and submitting project deliverables. No documents or materials of any kind are delivered to the client without the Project Manager's review and approval.

We firmly believe the most important factors in ensuring the highest quality of client satisfaction are the commitment the consultant brings to the engagement and the experience of the firm and the individual consultants working on the engagement.

Respond in a Timely Manner

Beyond the communication capabilities and routine project management practices identified above, our project team also has the depth and breadth necessary to meet time requirements of projects. It is our policy to make the best possible use of working time both on- and off-site. Our work schedules are completely flexible. Furthermore, as part of our practice, client calls and e-mails will be addressed no later than 24 hours upon receipt, if not earlier.

Meet and Exceed the Client's Expectations

The vision and values of CPS HR as an organization and for all of its personnel is centered around two primary values.

- **Satisfy the Client.** We will exceed client expectations whenever possible. We commit to quality and will assure that feel they have received a valuable service or product for the fee paid.
- **Value Ethical Behavior.** We model and reinforce honest and ethical behavior in all business relationships, including interactions with the Board members, clients, CPS HR staff, vendors, and the general public.

Our goal, therefore, is to ensure that our project team will meet or exceed your expectations for all phases of the project, and we will work diligently with your staff to meet fully the objectives of the project. We intend to accomplish this through our combination of sound project management procedures, good customer service, and solid communication strategies.

Our Communication Model

CPS HR Consulting recognizes that the success of any project depends upon the ability of the consulting team to develop and maintain effective working relationships with the Client's Project Representative, management, employees, and other key stakeholders. Throughout the project, we envision collaborating with the Client's Project Representative to maintain open lines of project communications and to develop a shared understanding of project needs, goals, and objectives.

CPS HR Consulting considers that open and consistent communication with project stakeholders is a key element of project acceptance and success. For that reason, the work plans presented by CPS HR Consulting contains multiple communication points with the Client and its employees including:

- Initial project meetings
- Workshops and focus group sessions with key stakeholders

- Bi-weekly or weekly scheduled Project Meetings (Via e-mail or teleconference)
- Employee Orientation Sessions
- Ad-hoc teleconference meetings with the Client Project Representative, and other designated stakeholders, as requested
- On-site meetings to present project deliverables

Progress Reporting Procedures

When a project begins, one of our first activities is to ensure that we have an accurate estimate of the level of effort required of each professional. These estimates are used to monitor the progress of each consultant against the work plan and project schedule. On a weekly basis throughout the project, professional hours are collected, accumulated, and distributed against project tasks so we can compare actual with budgeted performance.

An additional element related to the area of project control is the role of the Project Manager in monitoring the field work. The Project Manager is continuously involved in the review of ongoing activities to ensure that cost, schedule, and quality objectives are met. The Project Manager maintains frequent communication with project team members to coordinate ongoing activities and exchange pertinent information.

Periodic progress reports are another element of our project management and control system. The objective of project management is to provide close control and management of the team's efforts. It is our practice to provide the client with verbal interim progress reports based upon our project tracking. Ongoing written reports covering all services rendered to date will be provided monthly, and a year-end written report summarizing services provided for the contract year will be provided annually.

d. Provide details describing lines of authority and responsibility, and how your firm will respond proactively to problems and changes to the Scope of Work.

At CPS HR, our approach to managing authority, responsibility, and responsiveness is structured yet flexible, ensuring both effective project management and adaptability to evolving project needs.

■ **Lines of Authority and Responsibility:**

Our proposed project teams are organized in a clear hierarchy, designed to optimize communication and decision-making. For each service, at the helm is the Project Manager, serving as the primary point of contact and responsible for overall project oversight. The Project Manager is supported by a team of specialists, each a leader in their respective field, ensuring expert input across all project facets. This team structure ensures clear lines of authority and responsibility, with each member fully aware of their roles and the expectations set forth.

■ **Responding Proactively to Problems:**

We emphasize proactive problem-solving. Our Project Manager conducts regular review meetings to monitor progress, identify potential issues, and implement preemptive measures. In the event of unforeseen problems, we have a robust escalation protocol. Issues are promptly escalated to the appropriate level of management within our firm, ensuring swift and effective resolution.

■ **Adapting to Changes in the Scope of Work:**

Our approach to changes in the Scope of Work (SOW) is rooted in agility and open communication. We understand that project requirements can evolve, and our team is prepared to adapt swiftly. Any changes in the SOW are thoroughly analyzed by our Project Manager in collaboration with the client and the project team. We assess the impact of these changes on the project timeline, budget, and quality, and propose adjustments accordingly. Our aim is to ensure that any modifications are seamlessly integrated into the project plan, with minimal disruption to the ongoing work.

In summary, our firm is committed to delivering a well-managed project, characterized by clear lines of authority, proactive problem-solving, and adaptability to changes.

3. Describe your invoicing process. Is payment by credit card accepted? Progress payments? Is a deposit required?

Payments and Billing Process

CPS HR Consulting is flexible with payment options via check to our Wells Fargo lockbox, EFT/ACH and/or credit card processing. Accepted credit cards include Visa, MasterCard, and American Express.

CPS HR's standard practice is to invoice monthly for T&M and deliverable-based projects and/or upon completion for fixed fee projects. Our Finance Team works in conjunction with the CPS HR project manager regarding deliverables and/or project completion to invoice according to contract terms. Depending on client preference, invoices are mailed, emailed or submitted electronically to the client's A/P site for processing. CPS HR is flexible with the billing process if a client has special requirements for fiscal year-end timing, approval processes, or payment terms. No deposit is required.

Standard Payment Terms – Net 30

4. Review the pricing categories identified in Exhibit 1 of this RFP. Are there any category items that you cannot offer, or are there additional optional pricing categories that you wish to offer for consideration?

There are no category items that we cannot offer, and we have provided our standard pricing for each service we have proposed.

5. Designate and provide names of specific contact person(s) for the following phases: (1) proposal evaluation process (2) contracting process (3) contract administration (primary point of contact for receiving orders from participating agencies).

Contacts Information	
(1) Proposal Evaluation Process and (2) Contracting Process	Vicki Quintero Brashear, Director, Products & Services (916) 471-3418; vbrashear@cpsshr.us
(3) Contract Administration	Dimple Patel, Contracts Coordinator (916) 471-3363; dpatel@cpsshr.us

Tab E - Proposal Pricing

Service Category #1: Consulting Services

NOTE: Final pricing will depend on each organization's specific needs and selection of services. A fixed fee cost will be developed based on the hourly rates below.

Staff Member	Hourly Rate
Project Manager/Technical Specialist	\$155
Principal Consultant	\$150
Principal Program Coordinator	\$145
Senior Consultant	\$130
HR Consultant/Program Coordinator	\$115
Administrative Technician/Associate HR Consultant	\$105
Office Assistant	\$95

Service Category #2: Optional Ancillary Services

Subcategory: Full Compensation Package Review

Same as Service Category #1: Consulting Services

Subcategory: Employee Engagement

NOTE: Final pricing will depend on each organization's specific needs and selection of optional services

# Employees Total	# Key driver analysis*/ recommendations report	# Online breakout reports	Standard Package Price (First Survey)	Option: Up to 3 open-ended comments (reported verbatim, no analysis)	Option: Paper password invitations**
0-99	0*	Up to 5	\$10,500	\$430	\$420 (up to 50)
100-499	1	Up to 10	\$11,920	\$540	\$460 (up to 250)
500-999	1	Up to 20	\$12,890	\$700	\$520 (up to 500)
1,000-1,999	1	Up to 20	\$13,420	\$940	\$640 (up to 1,000)
2,000-2,999	1	Up to 20	\$13,950	\$1,200	\$750 (up to 1,500)
3,000-3,999	1	Up to 20	\$14,480	\$1,470	\$870 (up to 2,000)
4,000-4,999	1	Up to 20	\$15,000	\$1,740	\$990 (up to 2,500)
5,000-5,999	1	Up to 20	\$15,530	\$2,000	\$1,100 (up to 3,000)
6,000-6,999	1	Up to 20	\$16,060	\$2,270	\$1,220 (up to 3,500)
7,000-7,999	1	Up to 20	\$16,600	\$2,530	\$1,340 (up to 4,000)
8,000-8,999	1	Up to 20	\$17,120	\$2,800	\$1,450 (up to 4,500)
9,000-9,999	1	Up to 20	\$17,650	\$3,070	\$1,570 (up to 5,000)
10,000-10,999	1	Up to 30	\$18,890	\$3,330	\$1,690 (up to 5,500)

*100 responses required for key driver analysis / **Agency to print and distribute

Additional Survey Options (Fixed Fee):

- Spanish language option not included. Additional cost for Spanish survey translation -- \$1,500.
- Additional kickoff or results presentations (1-hour each, remote) -- \$450.
- Additional online breakout reports* -- \$100 per report. **Must be included in the contact file. Does not include new analysis or combinations of results after the survey is conducted.*
- Standard package includes one recommendations report overall. Additional recommendations reports -- \$150 per report.
- Additional key driver analysis (includes weights added to the report) --\$650 per analysis.
- Key driver weights added to an online report for a breakout unit (i.e., the breakout “inherits” the weights for the organization overall) -- \$100 per report.
- Results discussion meeting (1-hour, remote, includes customized recommendations report) -- \$500 per meeting + recommendations report.

Additional Follow-up Support Services (Time & Materials):

Service	Hourly Rate	Estimated Hours*
Action Planning Workshops	\$230	Minimum 15 hours for one session
Focus Groups	\$230	Minimum of 30 hours for three focus groups
Action Planning Implementation Support Services	\$250	Minimum of 10 hours for a series of five meetings with one leader or team

**Final number of hours depends on the agency’s specific needs, such as number of planning or follow-up meetings required, number of sessions, or number of focus group presentations*

Travel

In the event the agency desires to have in-person support by a Project Manager or Senior Project Consultant, which results in expenses incurred by CPS HR, the travel will be billed at the following flat rates, depending on consultant and client locations. The flat rate covers travel expenses such as consultant travel time, air, hotel, mileage, and per diem. The travel expenses shall be as follows as reflected on the chart below (per person, per trip, no longer than 5 days).

Description	Cost
One day trip by car (no overnight stay)	\$250
Two-day trip by car (one overnight stay)	\$1,000
Two-day trip by air (one overnight stay)	\$2,000
Three-day trip by air (two overnight stay)	\$2,500
Four-day trip by air (three overnight stay)	\$2,750
Five-day trip by air (four overnight stay)	\$3,000

Billing: We will bill one-half of the standard survey package total after the survey closes, and the remaining amount after we submit the reports. We will bill any additional survey options after we deliver them. We will bill any consulting time for optional follow-up support services (action planning, focus groups, implementation support) each month for work completed. Any travel will be billed as a flat rate.

Pricing for Subsequent Surveys:

Survey #2 = Survey #1 price + 5%

Survey #3 = Survey #2 price + 5%

Survey #4 = Survey #3 price + 5%

Survey #5 = Survey #4 price + 5%

Subcategory: Recruitment

Staff Level	Service	Pricing Structure	Pricing
Executive Search	Full-cycle recruitment (All Phases)	Flat Fee	\$25,000
Executive Search	Partial-cycle recruitment (Phase I & II)	Flat Fee	\$19,000
Executive Search	Professional Services for Outreach/ Advertising Only	Flat Fee	\$10,000
Middle Management/Specialized	Full-cycle recruitment (All Phases)	Flat Fee	\$20,000
Middle Management/Specialized	Partial-cycle recruitment (Phase I & II)	Flat Fee	\$17,000
Middle Management/Specialized	Professional Services for Outreach/ Advertising Only	Flat Fee	\$10,000

Subcategory: Training

Pricing Table: Group Training

Course Length	Virtual, Instructor-Led Training	Onsite, Instructor-Led Training
1-hour	\$575.00	\$1,200.00
1.5 - 2 hours	\$1,125.00	\$1,800.00
2.5 - 3 hours	\$1,450.00	\$2,400.00
1/2 day	\$1,800.00	\$3,000.00
1-day	\$3,300.00	\$4,800.00
1-day Blended (6-8 hours; Onsite w/LVT)	N/A	\$5,400.00
2-day	\$6,000.00	\$9,000.00
2-day Blended	N/A	\$9,000.00
2 1/2 day	\$7,200.00	\$11,750.00
3-day	\$9,000.00	\$14,500.00

NOTE: Some courses include 3rd party materials. 3rd party materials are an additional cost in addition to the training delivery rate. 3rd party materials are charged at the actual costs incurred.

Open Enrollment Pricing

The cost of each class is the current catalog price at the time of class registration.

[CPS HR Training Center \(expertusone.com\)](https://www.expertusone.com)

2024 – 2025 CPS HR Catalog Direct Link: [PowerPoint Presentation \(website-files.com\)](#)

Subcategory: Testing and Assessment

Test Rental Service Rates

Multiple-Choice Test Rental Exam Rates ¹				
	Stock Tests	Semi-Stock Tests	Agency Tests	Custom Tests
Base Fee (Per Order)	\$295.00	\$595.00	\$350.00	\$1295.00
1-100 Candidates (per candidate)	\$10.00	\$14.00	\$11.00	\$15.00
101-500 Candidates (per candidate)	\$9.50	\$13.00	\$10.50	\$14.00
501+ Candidates (per candidate)	\$9.00	\$12.00	\$10.00	\$13.00
New Item Writing/Entry	N/A	N/A	N/A	\$40 per item
Pick Up/Handling	5%	5%	5%	5%
Standard Shipping/Handling*	10%	10%	10%	10%
Expedited Shipping/Handling*	15%	15%	15%	15%

Online and/or Remote Proctoring Services for Multiple-Choice Examinations

Online test format is available for most test rental written examinations. Test rental's online examinations are designed to be administered in a proctored setting. Benefits of CPS HR's online testing program include easy materials handling - no hard copies to ship, track, and inventory, automated scoring for easy and fast results, and can be used for online and/or in-person proctoring.

Online Testing Options for Written Exams – Online Testing				
	Stock Tests	Semi-Stock Tests	Agency Tests	Custom Tests
Administrative Set Up Fee (per order)	\$95	\$95	\$95	\$95
One Time Exam Set Up Fee*	N/A	\$595	\$350	\$995
Per Candidate Fee	\$15	\$15	\$15	\$15
Title Change (optional)	\$25.00	N/A	N/A	N/A
Additional Supplement (optional)	\$50	N/A	N/A	N/A

* This one-time set-up fee will be applied for the first online administration of a semi-stock, agency or custom test.

Online Testing with Remote Proctor Services	
	Agency Price Tests
Administrative Set Up Fee (per order)	\$185.00
1 hour test (per candidate)	\$38.50
1 - 2 hour test (per candidate)	\$46.00
2 - 3 hour test (per candidate)	\$54.75
Over 3 hour test (per candidate)	\$63.50

Job Analysis

Task	Cost (Flat Fee)
Job Analysis (inclusive of a job analysis report)	\$7,900 per job analysis

General Costing Assumptions:

1. Flat fee costs assume a single job classification title; job classification series will be priced at the stated flat fee rate for each level within a classification series.
2. Costing assumes a job classification includes no more than 100 incumbents. In the event a job analysis is requested for a job classification title exceeding this number, CPS HR will work with the Agency to determine if additional steps and costs are necessary.
3. Each job analysis is cognitive based only and does not include identification of any physical abilities necessary for a job classification. Requests for physical ability job analyses and their related work and costs can be discussed upon request.
4. No travel costs are listed as all services will be provided through telephone, web conference (Microsoft Teams), and e-mail. In the event the Agency requests in-person meetings and/or requests job site visits, CPS HR will work with the Agency to confirm the additional scope of work and provide the Agency with the related costs.
5. All deliverables will be provided electronically in a confidential and secure manner, typically using a secure Microsoft Teams channel.
6. The Agency will be responsible for securing and coordinating the participation of subject matter experts (SMEs) for job analysis participation.

Tab F - References

Service Category #1: Consulting Services*

***NOTE: These references include both Service Category #1: Consulting Services and Service Category #2: Optional Ancillary Services (Subcategory: Full Compensation Package Review)**

Classification and Compensation

San Diego Association of Governments (SANDAG) (2017 – present)

Address: 401 B Street, Suite 800, San Diego, CA 92101

Contact: Melissa Coffelt, Sr. Director, Org. Effectiveness; (619) 699-1955; melissa.coffelt@sandag.org

City of Chicago (2022-present)

Address: 121 North LaSalle Street, Room 100, Chicago, IL 60602

Contact: Kevin Murphy, Managing Deputy Budget Director; (312) 744-5712; kevin.murphy@cityofchicago.org

Santa Clarita Valley Water Agency (2018-present)

Address: 27234 Bouquet Canyon Road, Santa Clarita, CA 91350

Contact: Aristea Mantis; (661) 297-1600 ext. 235; amantis@scvwa.org

County of Sacramento (1985-present)

Address: 700 H Street, 4th Floor

Contact: Rebecca Stuckert, HR Manager II; (916) 874-5073; stuckertr@saccounty.gov

Covered California (2023-present)

Address: 1601 Exposition Boulevard, Sacramento, CA 95815

Contact: Darci Haesche, Director, Administrative Services Division; (916) 228-8830; darci.haesche@covered.ca.gov

Service Category #2: Optional Ancillary Services

Subcategory: Employee Engagement

City of San Antonio (2018 to present)

Address: 100 W Houston St., San Antonio, TX 78205

Contact: Joel Jenks, Training and Engagement Administrator, Human Resources Department; (210) 207-8333; joel.jenks@sanantonio.gov

City of Houston (2022 to present)

Address: 4501 Leeland-EB Cape Center Suite 201, Houston, TX 77023

Contact: Denise R Wyche, Organizational Development Division Manager, HR; (832) 395-4822; denise.wyche@houstontx.gov

Dallas Area Rapid Transit (DART) (2018 to present)

Address: 1401 Pacific Ave, Dallas, TX 75202

Contact: Josie Benners Garcia, Director, Employee Engagement, Human Resources; (214) 749-3550; jgarcia3@dart.org

Texas Municipal Retirement System (2017 to 2022)

Address: 2717 Perseverance Drive, Suite 300, Austin, TX 78731

Contact: Leslie M. Ritter; Director of Human Resources; (512) 225-3712; lritter@tmrs.com

City of Norfolk, Virginia (2021 to present)

Address: 810 Union Street, Norfolk, VA 23510

Contact: Betty Meyer, PhD; Acting Manager, Department of Budget and Strategic Planning; (757) 664-6510; betty.meyer@norfolk.gov

Subcategory: Recruitment

City of Fort Worth, TX (2022 to Present)

Address: 1000 Throckmorton St, Fort Worth, TX 76102

Contact: Dianna M. Giordano, Director of Human Resources and Civil Service; (817) 392-7783; Dianna.giordano@fortworthtexas.gov

City of League City, TX (2020 - 2022)

Address: 300 W Walker St, League City, Texas 77573

Contact: James Brumm, Director of Human Resources & Civil Service; (281) 554-1006; james.brumm@leaguecitytx.gov

North Texas Municipal Water District, TX (2023)

Address: 501 E. Brown Street, Wylie, TX 75098

Contact: Ike Obi, IPMA-SCP, Assistant Deputy - Human Resources; (469) 626-4399; iobi@ntmwd.com

County of Travis, TX (2020 to Present)

Address: 700 Lavaca St., 7th Floor, Austin, Texas 78701

Contact: Susan Welbes, Administrative Services Division Director, Sr.; (512) 854-9417; Susan.Welbes@traviscountytx.gov

The Woodlands Township, TX (2022 - 2023)

Address: 2801 Technology Forest Blvd., The Woodlands, TX 77381

Contact: Monique Sharp, President; (281) 210-3831; msharp@thewoodlandstowship-tx.gov

Subcategory: Training

Texas Comptroller of Public Accounts (2019 – current)

Address: 10010 San Pedro Ave., Ste. 410, San Antonio, TX 78216

Contact: Delisha Stewart, Training Specialist, (512) 463-4984; Delisha.Stewart@cpa.texas.gov

Brownsville Public Utilities Board (2021 – 2022)

Address: 1425 Robinhood St., Brownsville, TX 78521

Contact: Marisa Gaytan, Manager, Organizational Development, (956) 983-6241; MGaytan@brownsville-pub.com

Los Angeles Department of Water and Power (2021 – current)

Address: 111 North Hope St., Los Angeles, CA

Contact: Liliana Chavez, Training Supervisor; (213) 367-1927; Liliana.Chavez@ladwp.com

City of Kerrville (2022)

Address: 701 Main St., Kerrville, TX 78028

Contact: Kim Meismer, Assistant City Manager; (830) 258-1140; kim.meismer@kerrvilletx.gov

City of Sacramento (2019 – current)

Address: 901 I St., Sacramento CA 95814

Contact: Dave Newman, Program Specialist, Org. Dev.; (916) 808-8954; DNewman@cityofsacramento.org

Subcategory: Testing and Assessment

City of Fort Worth, Texas (2004 – current)

Address: 908 Monroe Street, Fort Worth TX, 76102

Contact: Brittney Wills, Senior HR Analyst; (817) 392-7751; Brittney.Wills@FortWorthTexas.gov

City of Grand Prairie, Texas (2011-current)

Address: 300 W. Main Street, Grand Prairie TX 75050

Contact: Angela Pardue, HR Assistant; (972) 237-8032; apardue@GPTX.org

City of Irving, Texas (2017 – current)

Address: 825 W. Irving Blvd., Irving TX 75060

Contact: Jeff Smith, Talent Acquisition Partner; (972) 721-2696; jcsmith@cityofirving.org

City of Plano, Texas (2019-current)

Address: 1520 K Avenue; Plano, TX 75074

Contact Name: Barbara Slay, Senior Human Resources Analyst; (972) 941-7437; bslay@plano.gov

California Department of Parks and Recreation (2010-present)

Address: 715 P Street, 14th Floor, Sacramento, CA 95814

Contact Name: Mike Sexton, Exams Manager; (916) 653-9604; Mike.Sexton@parks.ca.gov

Tab G - Required Attachments

Exhibit 1: Description of Desired Service Categories for Proposed Pricing

EXHIBIT 1 DESCRIPTION OF DESIRED SERVICE CATEGORIES FOR PROPOSED PRICING

Offerors should furnish a proposal that contains pricing for the services they wish to offer, choosing from the list below. Offerors are not required to provide the entirety of services.

Service Category #1: Consulting Services.

Please provide a descriptive list of the various types of consulting services necessary to perform the typical compensation study as described in Section 4 along with their hourly rates. These are the services and rates that your firm would use to calculate a lump sum project cost with a client. Attach a separate page labeled “Service Category #1”) with the descriptive list and the applicable hourly rates.

Service Category #2: Optional Ancillary Services.

% _____ discount off your rate card. (Note: Please provide a descriptive list of the additional optional services you would like to offer. These are services that would not be ordinarily included in a compensation study project. Attach a separate page with a descriptive list labeled “Service Category #2”)

Exhibit 2: Sample Market Basket Form

EXHIBIT 2 SAMPLE MARKET BASKET FORM

This form will be used for **evaluation purposes only**. It is hypothetical in nature and in no way relates to a project that will be awarded by any particular Customer. Its purpose is an exercise to get a cost estimate from proposing firms for a project of similar nature.

Please use the information below to complete this section. The following specifications are derived from a hypothetical entity. The offeror should use the information below and the category pricing proposed to establish an approximate project cost for evaluation purposes.

Hypothetical Project Cost \$350,000 (lump sum)

Proposal for Hypothetical Compensation Study for the City of Whoville, USA

Background

Current Compensation Structure: The city currently has three separate and distinct pay structures: General Government, Police, and Fire. Each structure is made up of a hierarchical series of pay grades that have a minimum, a midpoint, and a maximum. The midpoint should reflect approximately the 50th percentile based on market data collected during the annual salary survey process.

Salary Survey: The City of Whoville last completed an annual survey in 2017-2018 and there has been no annual evaluation of salaries since that time. As a result, the City did not adjust minimums, midpoints, and maximums of pay ranges within the pay plans in 2021. This compensation study will reset the annual survey process to ensure our pay plan is competitive, based upon external market rates. The last survey was sent to approximately 100 comparable cities, counties, and private industries in the region with a return rate of approximately 30%. The last survey included 80 to 100 of our 300+ job classes (benchmarks), as well as all Police and Fire ranks. The survey asked for base salary and requested basic information regarding employee benefits. Base salary data is averaged (minimums, maximums, and actual averages) and benefits data was reported separately.

Current Needs: In June 2020, the City of Whoville recreated the Human Resources Department. With this transition and the impact of the pandemic, we need to reassess our current compensations procedures to ensure our job descriptions are compliant with Fair Labor Standards Act (FLSA) regulations, Equal Employment Opportunity (EEO) Class Codes, and encompasses the full needs of the position.

In our recent internal salary analysis process, we report base salary, but do not have an accurate method to account for other factors that affect total compensation, such as supplemental pay, cost of living, respondent organization size, benefits presented as part of compensation, etc. We would like this study to capture total compensation, including benefits. The City needs to assess compression issues for Police and Fire promotional rank positions. Additionally, the City of Whoville needs to determine the recruiting effectiveness of current entry level Police and Fire pay structures. We are also looking at possible ways to improve our Police and Fire rank structure. We also have some unintended compression in the mid-ranks as a result of a comprehensive compensation study that was conducted from 2008 - 2010. With the establishment of the new Human Resources department, we need to ensure robust communication of the methodology of this study, explanation of the cost of the implementation, and full transparency of the process.

The City of Whoville seeks a proposal to provide a review of the Total Compensation (compensation and benefits) for identified regular, full-time positions, to include all uniformed positions (estimate 50 uniformed job titles) and specified general government (estimate between 120-150 benchmark job descriptions) and recommend possible wage adjustments that align with the City's compensation philosophy – to be an employer of choice. The successful proposal will develop a comprehensive analysis on the comparison of the City of Whoville's compensation plan to other like sized municipalities and private organizations. This analysis and any subsequent recommended adjustments should include the "base pay" as one part of the analysis and the "total compensation package" (including base pay, health coverage, retirement/deferred

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compensation plan, longevity pay, life insurance, various types of leave, and all other supplemental types of income) as another part of the analysis/study. The intent of this analysis and documentation is to determine whether or not the City is competitive in terms of base pay and in terms of our "total compensation package." The consultant will review the identified job classification descriptions and compensation plan and determine the needs (if any) for modifications, which would assure internal equity and external competitiveness/retention. The consultant will provide a work plan and timetable with their proposal. The compensation analysis will include both internal and external equity measurements. The nature of the market comparison should include both public and private entities. Compensation data should be normed for cost-of-living variances. The study will examine the City of Whoville's current classification plan, compensation practices (pay structure, salary ranges, range spreads, and midpoint progressions), and review and update specified job descriptions (approximately 160 -200 job titles) to ensure accuracy and continuity across each of the job classes. This total compensation study shall consist of an analysis of the City's job descriptions, compliance with the Fair Labor Standards Act (FLSA) exemption status requirements, the Equal Employment Opportunity (EEO) Occupational Group designations, recommendations for improving pay structures, analysis of compression issues within job classes, assessment of current job classes and recommendations for modifications. If the classification's current FLSA exemption status by the City is determined to be in error, the consultant will recommend/propose changes, and then develop a Classification table based upon the Position Description Questionnaires and the FLSA questionnaires. This analysis will also include verification of the Equal Employment Opportunity (EEO) classification code for each position. Should the consultant find errors, recommended codes should be provided to correct the error. The development of a salary structure supported by the survey data is expected to distribute the uniform positions across multiple salary grades to minimize the amount of impact that will occur as positions are placed in new salary grades. The analysis will include a specific plan for reducing compression of uniformed positions. The successful proposer will be expected to provide training for select staff on the methodology used to create the classification and compensation structure and classification assignments so that it may be properly maintained, as new positions are added, and existing positions are modified in the future. It is expected that the selected firm will meet with top City leadership, including Human Resources staff, to discuss compensation/classification system issues and areas of concern at the inception of the project. The city further expects ongoing and open communications between the consultant and HR Department over the course of performing the work and services and throughout each work phase. All products and recommendations must comply with applicable State and Federal laws and enhance the City of Whoville's ability to recruit and retain qualified personnel. It is expected that the successful proposer will prepare a fully documented final report with recommendations including implementation options and costs for each option. This report shall include the steps and strategies necessary for implementing each option, with the objective of minimizing the amount of movement across grade levels for the employees, and to keep the fiscal impact of the recommendations and implementation options to a level that can be managed over time. The successful bidder will meet with City leadership, including Human Resources staff to explain and discuss these recommendations and implementation options, and make formal presentation(s) to the Mayor's Leadership Team, as directed by the Human Resources staff. Additionally, the successful bidder will conduct up to six meetings with affected employees to outline the study methodology and results, and to respond to questions.

Projected Timetable: The work and services are to begin upon execution of Contract with a target or projected completion of 120 calendar days. Completion of the communication plan, to include meetings with Leadership and affected employees shall be completed within an additional 120 calendar days thereafter.

Exhibit 3: Service Area Designation Forms

EXHIBIT 3 SERVICE DESIGNATION AREAS

Texas Service Area Designation or Identification			
Proposing Firm Name:	CPS HR Consulting		
Notes:	Indicate in the appropriate box whether you are proposing to service the entire state of Texas		
	Will service the entire state of Texas	Will not service the entire state of Texas	
	Yes		
	If you are not proposing to service the entire state of Texas, designate on the form below the regions that you are proposing to provide goods and/or services to. By designating a region or regions, you are certifying that you are willing and able to provide the proposed goods and services.		
Item	Region	Metropolitan Statistical Areas	Designated Service Area
1.	North Central Texas	16 counties in the Dallas-Fort Worth Metropolitan area	
2.	High Plains	Amarillo Lubbock	
3.	Northwest	Abilene Wichita Falls	
4.	Upper East	Longview Texarkana, TX-AR Metro Area Tyler	
5.	Southeast	Beaumont-Port Arthur	
6.	Gulf Coast	Houston-The Woodlands- Sugar Land	
7.	Central Texas	College Station-Bryan Killeen-Temple Waco	
8.	Capital Texas	Austin-Round Rock	
9.	Alamo	San Antonio-New Braunfels Victoria	
10.	South Texas	Brownsville-Harlingen Corpus Christi Laredo McAllen-Edinburg-Mission	
11.	West Texas	Midland Odessa San Angelo	
12.	Upper Rio Grande	El Paso	

(Exhibit 3 continued on next page)

(Exhibit 3 continued)

Nationwide Service Area Designation or Identification Form			
Proposing Firm Name:	CPS HR Consulting		
Notes:	Indicate in the appropriate box whether you are proposing to provide service to all Fifty (50) States.		
	Will service all fifty (50) states	Will not service fifty (50) states	
	Yes		
	<p>If you are not proposing to service to all fifty (50) states, then designate on the form below the states that you will provide service to. By designating a state or states, you are certifying that you are willing and able to provide the proposed goods and services in those states.</p> <p>If you are only proposing to service a specific region, metropolitan statistical area (MSA), or city in a State, then indicate as such in the appropriate column box.</p>		
Item	State	Region/MSA/City (write "ALL" if proposing to service entire state)	Designated as a Service Area
1.	Alabama		
2.	Alaska		
3.	Arizona		
4.	Arkansas		
5.	California		
6.	Colorado		
7.	Connecticut		
8.	Delaware		
9.	Florida		
10.	Georgia		
11.	Hawaii		
12.	Idaho		
13.	Illinois		
14.	Indiana		
15.	Iowa		
16.	Kansas		
17.	Kentucky		
18.	Louisiana		
19.	Maine		

20.	Maryland		
21.	Massachusetts		
22.	Michigan		
23.	Minnesota		
24.	Mississippi		
25.	Missouri		
26.	Montana		
27.	Nebraska		
28.	Nevada		
29.	New Hampshire		
30.	New Jersey		
31.	New Mexico		
32.	New York		
33.	North Carolina		
34.	North Dakota		
35.	Ohio		
36.	Oregon		
37.	Oklahoma		
38.	Pennsylvania		
39.	Rhode Island		
40.	South Carolina		
41.	South Dakota		
42.	Tennessee		
43.	Texas		
44.	Utah		
45.	Vermont		
46.	Virginia		
47.	Washington		
48.	West Virginia		
49.	Wisconsin		
50.	Wyoming		

End of Exhibit 3

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Attachment I: Instructions for Proposals Compliance and Submittal

ATTACHMENT I: INSTRUCTIONS FOR PROPOSALS COMPLIANCE AND SUBMITTAL

REQUIRED ATTACHMENT CHECKLIST

This checklist is provided as a courtesy to responding firms. Please utilize this checklist to ensure that all required attachments are included with your proposal. IF AN ATTACHMENT DOES NOT APPLY, PLEASE MARK AS “NOT APPLICABLE” AND SUBMIT WITH THE PROPOSAL. FAILURE TO SUBMIT ALL REQUIRED DOCUMENTS MAY NEGATIVELY IMPACT YOUR EVALUATION SCORE.

- ☒ Cover Sheet
- ☒ Proposal Narrative (providing all information required by, and labeled as, TABS A-F)
- ☒ Exhibit 1: Description of Desired Service Categories for Proposed Pricing
- ☒ Exhibit 2: Sample Market Basket Form
- ☒ Exhibit 3: Service Area Designation Forms
- ☒ Attachment I: Instructions for Proposals Compliance and Submittal
- ☒ Attachment II: Certification of Offeror
- ☒ Attachment III: Certification Regarding Debarment
- ☒ Attachment IV: Restrictions on Lobbying
- ☒ Attachment V: Drug-Free Workplace Certification
- ☒ Attachment VI: Certification Regarding Disclosure of Conflict of Interest
- ☒ Attachment VII: Certification of Fair Business Practices
- ☒ Attachment VIII: Certification of Good Standing Texas Corporate Franchise Tax Certification
- ☒ Attachment IX: Historically Underutilized Businesses, Minority Or Women-Owned Or Disadvantaged Business Enterprises - **NOT APPLICABLE**
- ☒ Attachment X: Federal and State of Texas Required Procurement Provisions
- ☒ Attachment XI: Conflict of Interest Questionnaire

Compliance with the Solicitation

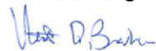
Submissions must be in strict compliance with this solicitation. Failure to comply with all provisions of the solicitation may result in disqualification. Offeror recognizes that all proposals must be submitted electronically through PublicPurchase.com by the RFP due date and time. All other forms of submissions will be deemed nonresponsive and will not be opened or considered.

Acknowledgment of Insurance Requirements

By signing its submission, Offeror acknowledges that it has read and understands the insurance requirements for the submission. Offeror also understands that the evidence of required insurance may be requested to be submitted within ten (10) working days following notification of its offer being accepted; otherwise, NCTCOG may rescind its acceptance of the Offeror's proposals. The insurance requirements are outlined in Section 6.4.

CPS HR Consulting

Name of Organization/Contractor



Signature of Authorized Representative

Vicki Quintero Brashear, Director of Products and Services

Printed/Typed Name and Title of Authorized Representative

January 4, 2024

Date

Attachment II: Certification of Offeror

ATTACHMENT II: CERTIFICATIONS OF OFFEROR

I hereby certify that the information contained in this proposal and any attachments is true and correct and may be viewed as an accurate representation of proposed services to be provided by this organization. I certify that no employee, board member, or agent of the North Central Texas Council of Governments has assisted in the preparation of this proposal. I agree that failure to submit all requested information may result in rejection of this proposal as non-responsive. I acknowledge that I have read and understand the requirements and provisions of the solicitation and that the organization will comply with the regulations and other applicable local, state, and federal regulations and directives in the implementation of this contract.

I also certify that I have read and understood all sections of this solicitation and will comply with all the terms and conditions as stated; and furthermore that I, Vicki Quintero Brashear (typed or printed name) certify that I am the Director of Products and Services (title) of the corporation, partnership, or sole proprietorship, or other eligible entity named as offeror and offeror herein and that I am legally authorized to sign this offer and to submit it to the North Central Texas Council of Governments, on behalf of said offeror by authority of its governing body.

CPS HR Consulting

Name of Organization/Contractor



Signature of Authorized Representative

Vicki Quintero Brashear, Director of Products and Services

Printed/Typed Name and Title of Authorized Representative

January 4, 2024

Date

Attachment III: Certification Regarding Debarment, Suspension and Other Responsibility Matters

ATTACHMENT III: CERTIFICATION REGARDING DEBARMENT, SUSPENSION AND OTHER RESPONSIBILITY MATTERS

This certification is required by the Federal Regulations Implementing Executive Order 12549, Debarment and Suspension, 45 CFR Part 93, Government-wide Debarment and Suspension, for the Department of Agriculture (7 CFR Part 3017), Department of Labor (29 CFR Part 98), Department of Education (34 CFR Parts 85, 668, 682), Department of Health and Human Services (45 CFR Part 76).

The undersigned certifies, to the best of his or her knowledge and belief, that both it and its principals:

1. Are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any federal department or agency;
2. Have not within a three-year period preceding this contract been convicted of or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, State, or Local) transaction or contract under a public transaction, violation of federal or State antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification, or destruction of records, making false Proposals, or receiving stolen property;
3. Are not presently indicated for or otherwise criminally or civilly charged by a government entity with commission of any of the offense enumerated in Paragraph (2) of this certification; and,
4. Have not within a three-year period preceding this contract had one or more public transactions terminated for cause or default.

Where the prospective recipient of federal assistance funds is unable to certify to any of the qualifications in this certification, such prospective recipient shall attach an explanation to this certification form.

CPS HR Consulting

Name of Organization/Contractor(s):



Signature of Authorized Representative

Vicki Quintero Brashear, Director of Products and Services

Printed/Typed Name and Title of Authorized Representative

January 4, 2024

Date

Attachment IV: Restrictions on Lobbying

ATTACHMENT IV: RESTRICTIONS ON LOBBYING

Section 319 of Public Law 101-121 prohibits recipients of federal contracts, grants, and loans exceeding \$100,000 at any tier under a federal contract from using appropriated funds for lobbying the Executive or Legislative Branches of the federal government in connection with a specific contract, grant, or loan. Section 319 also requires each person who requests or receives a federal contract or grant in excess of \$100,000 to disclose lobbying.

No appropriated funds may be expended by the recipient of a federal contract, loan, or cooperative agreement to pay any person for influencing or attempting to influence an officer or employee of any federal executive department or agency as well as any independent regulatory commission or government corporation, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with any of the following covered federal actions: the awarding of any federal contract, the making of any federal grant, the making of any federal loan the entering into of any cooperative agreement and the extension, continuation, renewal, amendment, or modification of any federal contract, grant, loan, or cooperative agreement.

As a recipient of a federal grant exceeding \$100,000, NCTCOG requires its subcontractors of that grant to file a certification, set forth in Appendix B.1, that neither the agency nor its employees have made, or will make, any payment prohibited by the preceding paragraph.

Subcontractors are also required to file with NCTCOG a disclosure form, set forth in Appendix B.2, if the subcontractor or its employees have made or have agreed to make any payment using nonappropriated funds (to include profits from any federal action), which would be prohibited if paid for with appropriated funds.

(Attachment IV: Cont.)

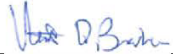
**LOBBYING CERTIFICATION
FOR CONTRACTS, GRANTS, LOANS, AND COOPERATIVE AGREEMENTS**

The undersigned certifies, to the best of his or her knowledge or belief, that:

1. No federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an officer or employee of a Member of Congress in connection with the awarding of any federal contract, the making of any federal loan, the entering into of any cooperative Contract, and the extension, continuation, renewal, amendment, or modification of any federal contract, grant, loan, or cooperative contract; and
2. If any funds other than federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this federal contract, grant, loan, and or cooperative contract, the undersigned shall complete and submit Standard Form – LLL, “Disclosure Form to Report Lobbying”, in accordance with the instructions.
3. The undersigned shall require that the language of this certification be included in the award documents for all sub-awards at all tiers and that all sub-recipients shall certify accordingly.

CPS HR Consulting

Name of Organization/Contractor



Signature of Authorized Representative

Vicki Quintero Brashear, Director of Products and Services

Printed/Typed Name and Title of Authorized Representative

January 4, 2024

Date

Attachment V: Drug Free Workplace Certification

ATTACHMENT V: DRUG-FREE WORKPLACE CERTIFICATION

The CPS HR Consulting (company name) will provide a Drug Free Work Place in compliance with the Drug Free Work Place Act of 1988. The unlawful manufacture, distribution, dispensing, possession or use of a controlled substance is prohibited on the premises of the CPS HR Consulting (company name) or any of its facilities. Any employee who violates this prohibition will be subject to disciplinary action up to and including termination. All employees, as a condition of employment, will comply with this policy.

CERTIFICATION REGARDING DRUG-FREE WORKPLACE

This certification is required by the Federal Regulations Implementing Sections 5151-5160 of the Drug-Free Workplace Act, 41 U.S.C. 701, for the Department of Agriculture (7 CFR Part 3017), Department of Labor (29 CFR Part 98), Department of Education (34 CFR Parts 85, 668 and 682), Department of Health and Human Services (45 CFR Part 76).

The undersigned subcontractor certifies it will provide a drug-free workplace by:

Publishing a policy Proposal notifying employees that the unlawful manufacture, distribution, dispensing, possession or use of a controlled substance is prohibited in the workplace and specifying the consequences of any such action by an employee;

Establishing an ongoing drug-free awareness program to inform employees of the dangers of drug abuse in the workplace, the subcontractor's policy of maintaining a drug-free workplace, the availability of counseling, rehabilitation and employee assistance programs, and the penalties that may be imposed on employees for drug violations in the workplace;

Providing each employee with a copy of the subcontractor's policy Proposal;

Notifying the employees in the subcontractor's policy Proposal that as a condition of employment under this subcontract, employees shall abide by the terms of the policy Proposal and notifying the subcontractor in writing within five days after any conviction for a violation by the employee of a criminal drug abuse statute in the workplace;

Notifying the Board within ten (10) days of the subcontractor's receipt of a notice of a conviction of any employee; and,

Taking appropriate personnel action against an employee convicted of violating a criminal drug statute or requires such employee to participate in a drug abuse assistance or rehabilitation program.

CPS HR Consulting

Name of Organization/Contractor



Signature of Authorized Representative

Vicki Quintero Brashear, Director of Products and Services

Printed/Typed Name and Title of Authorized Representative

January 4, 2024

Date

Attachment VI: Certification Regarding Disclosure of Conflict of Interest

ATTACHMENT VI: CERTIFICATION REGARDING DISCLOSURE OF CONFLICT OF INTEREST

The undersigned certifies that, to the best of his or her knowledge or belief, that:

“No employee of the contractor, no member of the contractor’s governing board or body, and no person who exercises any functions or responsibilities in the review or approval of the undertaking or carrying out of this contract shall participate in any decision relating to this contract which affects his/her personal pecuniary interest.

Executives and employees of contractor shall be particularly aware of the varying degrees of influence that can be exerted by personal friends and associates and, in administering the contract, shall exercise due diligence to avoid situations which give rise to an assertion that favorable treatment is being granted to friends and associates. When it is in the public interest for the contractor to conduct business with a friend or associate of an executive or employee of the contractor, an elected official in the area or a member of the North Central Texas Council of Governments, a permanent record of the transaction shall be retained.

Any executive or employee of the contractor, an elected official in the area or a member of the NCTCOG, shall not solicit or accept money or any other consideration from a third person, for the performance of an act reimbursed in whole or part by contractor or Department. Supplies, tools, materials, equipment or services purchased with contract funds shall be used solely for purposes allowed under this contract. No member of the NCTCOG shall cast a vote on the provision of services by that member (or any organization which that member represents) or vote on any matter which would provide a direct or indirect financial benefit to the member or any business or organization which the member directly represents”.

No officer, employee or paid consultant of the contractor is a member of the NCTCOG.

No officer, manager or paid consultant of the contractor is married to a member of the NCTCOG.

No member of NCTCOG directly owns, controls or has interest in the contractor.

The contractor has disclosed any interest, fact, or circumstance that does or may present a potential conflict of interest.

No member of the NCTCOG receives compensation from the contractor for lobbying activities as defined in Chapter 305 of the Texas Government Code.

Should the contractor fail to abide by the foregoing covenants and affirmations regarding conflict of interest, the contractor shall not be entitled to the recovery of any costs or expenses incurred in relation to the contract and shall immediately refund to the North Central Texas Council of Governments any fees or expenses that may have been paid under this contract and shall further be liable for any other costs incurred or damages sustained by the NCTCOG as it relates to this contract.

CPS HR Consulting

Name of Organization/Contractor



Signature of Authorized Representative:

Vicki Quintero Brashear, Director of Products and Services

Printed/Typed Name and Title of Authorized Representative

January 4, 2024

Date

Attachment VII: Certification of Fair Business Practices

ATTACHMENT VII: CERTIFICATION OF FAIR BUSINESS PRACTICES

That the submitter has not been found guilty of unfair business practices in a judicial or state agency administrative proceeding during the preceding year. The submitter further affirms that no officer of the submitter has served as an officer of any company found guilty of unfair business practices in a judicial or state agency administrative during the preceding year.

CPS HR Consulting

Name of Organization/Contractor



Signature of Authorized Representative

Vicki Quintero Brashear, Director of Products and Services

Printed/Typed Name and Title of Authorized Representative

January 4, 2024

Date

Attachment VIII: Certification of Good Standing Texas Corporate Franchise Tax Certification

ATTACHMENT VIII: CERTIFICATION OF GOOD STANDING TEXAS CORPORATE FRANCHISE TAX CERTIFICATION

Pursuant to Article 2.45, Texas Business Corporation Act, state agencies may not contract with for profit corporations that are delinquent in making state franchise tax payments. The following certification that the corporation entering into this offer is current in its franchise taxes must be signed by the individual authorized on Form 2031, Corporate Board of Directors Resolution, to sign the contract for the corporation.

The undersigned authorized representative of the corporation making the offer herein certified that the following indicated Proposal is true and correct and that the undersigned understands that making a false Proposal is a material breach of contract and is grounds for contract cancellation.

Indicate the certification that applies to your corporation:

_____ The Corporation is a for-profit corporation and certifies that it is not delinquent in its franchise tax payments to the State of Texas.

 X The Corporation is a non-profit corporation or is otherwise not subject to payment of franchise taxes to the State of Texas.

Type of Business (if not corporation): ☐ Sole Proprietor
☐ Partnership
☒ Other - Joint Powers Authority

Pursuant to Article 2.45, Texas Business Corporation Act, the North Central Texas Council of Governments reserves the right to request information regarding state franchise tax payments.

CPS HR Consulting

Name of Organization/Contractor



Signature of Authorized Representative

Vicki Quintero Brashear, Director of Products and Services
Printed/Typed Name and Title of Authorized Representative

January 4, 2024
Date

Attachment IX: Historically Underutilized Businesses, Minority or Women-Owned Or Disadvantaged Business Enterprises

NOT APPLICABLE

ATTACHMENT IX: HISTORICALLY UNDERUTILIZED BUSINESSES, MINORITY OR WOMEN-OWNED OR DISADVANTAGED BUSINESS ENTERPRISES

Historically Underutilized Businesses (HUBs), minority or women-owned or disadvantaged businesses enterprises (M/W/DBE) are encouraged to participate in the solicitation process. Representatives from HUB vendors should identify themselves and submit a copy of their certification.

NCTCOG recognizes the certifications of both the State of Texas Program and the North Central Texas Regional Certification Agency. Companies seeking information concerning HUB certification are urged to contact:

State of Texas HUB Program
Texas Comptroller of Public Accounts
Lyndon B. Johnson State Office Building
111 East 17th Street
Austin, Texas 78774
(512) 463-6958
<http://www.window.state.tx.us/procurement/prog/hub/>

Local businesses seeking M/W/DBE certification should contact:

North Central Texas Regional Certification Agency
624 Six Flags Drive, Suite 100
Arlington, TX 76011
(817) 640-0606
<http://www.nctrca.org/certification.html>

Submitter must include a copy of its minority certification documentation as part of this solicitation.
If your company is already certified, attach a copy of your certification to this form and return with your proposal.

Indicate all that apply:

_____ Minority-Owned Business Enterprise
_____ Women-Owned Business Enterprise
_____ Disadvantaged Business Enterprise

ATTEST TO Attachments of Certification:

Authorized Signature

Typed Name

Date

Subscribed and sworn to before me this _____ day of _____ (month), 20__ in
_____ (city), _____ (county), _____ (state).

SEAL

Notary Public in and for _____ (County),

State of _____ Commission expires: _____

Attachment X: Federal and State of Texas Required Procurement Provisions

ATTACHMENT X NCTCOG FEDERAL AND STATE OF TEXAS REQUIRED PROCUREMENT PROVISIONS

Note: The following provisions are mandated by Federal and/or State of Texas law. Failure to certify the following will result in disqualification of consideration for contract. Entities or agencies that are not able to comply with the following statements will be ineligible for consideration of contract award.

(Attachment continued on next page)

(Attachment X: Cont.)

**PROHIBITED TELECOMMUNICATIONS AND VIDEO SURVEILLANCE SERVICES OR EQUIPMENT
CERTIFICATION**

This Contract is subject to the Public Law 115-232, Section 889, and 2 Code of Federal Regulations (CFR) Part 200, including §200.216 and §200.471, for prohibition on certain telecommunications and video surveillance or equipment. Public Law 115-232, Section 889, identifies that restricted telecommunications and video surveillance equipment or services (e.g., phones, internet, video surveillance, cloud servers) include the following:

- A) Telecommunications equipment that is produced by Huawei Technologies Company or ZTE Corporation (or any subsidiary or affiliates of such entities).
- B) Video surveillance and telecommunications equipment produced by Hytera Communications Corporations, Hangzhou Hikvision Digital Technology Company, or Dahua Technology Company (or any subsidiary or affiliates of such entities).
- C) Telecommunications or video surveillance services used by such entities or using such equipment.
- D) Telecommunications or video surveillance equipment or services produced or provided by an entity that the Secretary of Defense, Director of the National Intelligence, or the Director of the Federal Bureau of Investigation reasonably believes to be an entity owned or controlled by the government of a covered foreign country. The entity identified below, through its authorized representative, hereby certifies that no funds under this Contract will be obligated or expended to procure or obtain telecommunication or video surveillance services or equipment or systems that use covered telecommunications equipment or services as a substantial or essential component of any system, or as a critical technology as part of any system prohibited by 2 CFR §200.216 and §200.471, or applicable provisions in Public Law 115-232 Section 889.

☒ The Contractor or Subrecipient hereby certifies that it does comply with the requirements of 2 CFR §200.216 and §200.471, or applicable regulations in Public Law 115-232 Section 889.

CPS HR Consulting

Name of Organization/Contractor



Signature of Authorized Representative

Vicki Quintero Brashear, Director of Products and Services

Printed/Typed Name and Title of Authorized Representative

January 4, 2024

Date:

-OR-

☐ The Contractor or Subrecipient hereby certifies that it cannot comply with the requirements of 2 CFR §200.216 and §200.471, or applicable regulations in Public Law 115-232 Section 889.

Name of Organization/Contractor

Signature of Authorized Representative

Printed/Typed Name and Title of Authorized Representative

Date

(Attachment continued on next page)

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(Attachment X: Cont.)

DISCRIMINATION AGAINST FIREARMS ENTITIES OR FIREARMS TRADE ASSOCIATIONS

This contract is subject to the Texas Local Government Code chapter 2274, Subtitle F, Title 10, prohibiting contracts with companies who discriminate against firearm and ammunition industries.

TLGC chapter 2274, Subtitle F, Title 10, identifies that “discrimination against a firearm entity or firearm trade association” includes the following:

- A) means, with respect to the entity or association, to:
 - I. refuse to engage in the trade of any goods or services with the entity or association based solely on its status as a firearm entity or firearm trade association; and
 - II. refrain from continuing an existing business relationship with the entity or association based solely on its status as a firearm entity or firearm trade association; or
 - III. terminate an existing business relationship with the entity or association based solely on its status as a firearm entity or firearm trade association.
- B) An exception to this provision excludes the following:
 - I. contracts with a sole-source provider; or
 - II. the government entity does not receive bids from companies who can provide written verification.

The entity identified below, through its authorized representative, hereby certifies that they have no practice, policy, guidance, or directive that discriminates against a firearm entity or firearm trade association; and that they will not discriminate during the term of the contract against a firearm entity or firearm trade association as prohibited by Chapter 2274, Subtitle F, Title 10 of the Texas Local Government Code.

☒ **The Contractor or Subrecipient hereby certifies that it does comply with the requirements of Chapter 2274, Subtitle F, Title 10.**

CPS HR Consulting

Name of Organization/Contractor



Signature of Authorized Representative

Vicki Quintero Brashear, Director of Products and Services

Printed/Typed Name and Title of Authorized Representative

January 4, 2024

Date

-OR-

☐ **The Contractor or Subrecipient hereby certifies that it cannot comply with the requirements of Chapter 2274, Subtitle F, Title 10.**

Name of Organization/Contractor

Signature of Authorized Representative

Printed/Typed Name and Title of Authorized Representative

Date

(Attachment continued on next page)

Page 39 of Solicitation

(Attachment X: Cont.)
BOYCOTTING OF CERTAIN ENERGY COMPANIES

This contract is subject to the Texas Local Government Code chapter 809, Subtitle A, Title 8, prohibiting contracts with companies who boycott certain energy companies.

TLGC chapter Code chapter 809, Subtitle A, Title 8, identifies that “boycott energy company” means, without an ordinary business purpose, refusing to deal with, terminating business activities with, or otherwise taking any action that is intended to penalize, inflict economic harm on, or limit commercial relations with a company because the company:

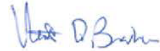
- I. engages in the exploration, production, utilization, transportation, sale, or manufacturing of fossil fuel-based energy and does not commit or pledge to meet environmental standards beyond applicable federal and state law; and
- II. does business with a company described by paragraph (I).

The entity identified below, through its authorized representative, hereby certifies that they do not boycott energy companies, and that they will not boycott energy companies during the term of the contract as prohibited by Chapter 809, Subtitle A, Title 8 of the Texas Local Government Code.

☒ The Contractor or Subrecipient hereby certifies that it does comply with the requirements of Chapter 809, Subtitle A, Title 8.

CPS HR Consulting

Name of Organization/Contractor



Signature of Authorized Representative

Vicki Quintero Brashear, Director of Products and Services

Printed/Typed Name and Title of Authorized Representative

January 4, 2024

Date

-OR-

☐ The Contractor or Subrecipient hereby certifies that it cannot comply with the requirements of Chapter 809, Subtitle A, Title 8.

Name of Organization/Contractor

Signature of Authorized Representative

Printed/Typed Name and Title of Authorized Representative

Date

Attachment XI: Conflict of Interest Questionnaire

CONFLICT OF INTEREST QUESTIONNAIRE For vendor doing business with local governmental entity		FORM CIQ
<p>This questionnaire reflects changes made to the law by H.B. 23, 84th Leg., Regular Session.</p> <p>This questionnaire is being filed in accordance with Chapter 176, Local Government Code, by a vendor who has a business relationship as defined by Section 176.001(1-a) with a local governmental entity and the vendor meets requirements under Section 176.006(a).</p> <p>By law this questionnaire must be filed with the records administrator of the local governmental entity not later than the 7th business day after the date the vendor becomes aware of facts that require the statement to be filed. See Section 176.006(a-1), Local Government Code.</p> <p>A vendor commits an offense if the vendor knowingly violates Section 176.006, Local Government Code. An offense under this section is a misdemeanor.</p>		OFFICE USE ONLY Date Received
1 Name of vendor who has a business relationship with local governmental entity.	CPS HR Consulting	
2 <input type="checkbox"/> Check this box if you are filing an update to a previously filed questionnaire. (The law requires that you file an updated completed questionnaire with the appropriate filing authority not later than the 7th business day after the date on which you became aware that the originally filed questionnaire was incomplete or inaccurate.)		
3 Name of local government officer about whom the information is being disclosed. <div style="text-align: center; margin: 10px 0;">N/A</div> <div style="text-align: center; font-size: small;">Name of Officer</div>		
4 Describe each employment or other business relationship with the local government officer, or a family member of the officer, as described by Section 176.003(a)(2)(A). Also describe any family relationship with the local government officer. Complete subparts A and B for each employment or business relationship described. Attach additional pages to this Form CIQ as necessary. <div style="margin-top: 20px;"><p>A. Is the local government officer or a family member of the officer receiving or likely to receive taxable income, other than investment income, from the vendor?</p><div style="display: flex; justify-content: space-around; margin-top: 5px;"><input type="checkbox"/> Yes <input type="checkbox"/> No</div></div> <div style="margin-top: 10px;"><p>B. Is the vendor receiving or likely to receive taxable income, other than investment income, from or at the direction of the local government officer or a family member of the officer AND the taxable income is not received from the local governmental entity?</p><div style="display: flex; justify-content: space-around; margin-top: 5px;"><input type="checkbox"/> Yes <input type="checkbox"/> No</div></div>		
5 Describe each employment or business relationship that the vendor named in Section 1 maintains with a corporation or other business entity with respect to which the local government officer serves as an officer or director, or holds an ownership interest of one percent or more.		
6 <input type="checkbox"/> Check this box if the vendor has given the local government officer or a family member of the officer one or more gifts as described in Section 176.003(a)(2)(B), excluding gifts described in Section 176.003(a-1).		
<div style="display: flex; align-items: center;"><div style="text-align: center; margin-right: 20px;"> Signature of vendor doing business with the governmental entity</div><div style="text-align: center;"><div style="margin-bottom: 5px;">January 4, 2024</div><div style="font-size: small;">Date</div></div></div>		