LEGISLATIVE, FINANCE, AND ADMINISTRATION COMMITTEE

A G E N D A

January 28, 2008 - 6:00 P.M. - Council Chambers - City Hall - City of Dover

Public comments are welcomed on any item and will be permitted at appropriate times. When possible, please notify the City Clerk (736-7008 or e-mail at Tmcdowell@dover.de.us) should you wish to be recognized.

AGENDA ADDITIONS/DELETIONS

1. Results and Recommendations from Request for Proposals - Pay for Performance Consultant

2. Revenue Forecast Model - FY 2009

3. Adjournment by 6:55 P.M.

/tm
S:\ClerksOffice\Agendas&Minutes\Committee-Agendas\2008\01-28-2008 LF&A.wpd

THE AGENDA ITEMS AS LISTED MAY NOT BE CONSIDERED IN SEQUENCE. THIS AGENDA IS SUBJECT TO CHANGE TO INCLUDE THE ADDITION OR THE DELETION OF ITEMS, INCLUDING EXECUTIVE SESSIONS.

ACTION FORM

PROCEEDING: Legislative, Finance & Administration Committee	**AGENDA ITEM NO.:** 01/28/2008
DEPARTMENT OF ORIGIN: Human Resources	**DATE SUBMITTED**: 01/16/2008
PREPARED BY: Frank E. Szyjka	
SUBJECT: Results and Recommendations from Request for Proposals - Pay for Performance Consultant	
REFERENCE:N/A	
RELATED PROJECT:N/A	
APPROVALS: City Manager	
EXHIBITS: See Attached Proposal PFP	
EXPENDITURE REQUIRED: $34,965 **FUNDING SOURCE (Dept./Page in CIP & Budget)**:	**AMOUNT BUDGETED**: See Below
TIMETABLE: Approval of Legislative & Finance Committee to have final report to City no later than March 31, 2008.	
RECOMMENDED ACTION: Approval to hire Management Advisory Group	

BACKGROUND AND ANALYSIS

The PFP sub-committee consisting of Council Representatives William McGlumphy and Reuben Salters, City Manager, Tony DePrima and Human Resources Director, Frank E. Szyjka interviewed both Consultants who bid on the Pay for Performance (PFP) Evaluation System Review. It was decided that the Management Advisory Group was the most qualified to complete the outlined evaluation of the PFP System. The sub-committee recommends that the City move forward to hire the Management Advisory Group to complete this evaluation as outlined in the attached exhibit.

The study was not budgeted for but was supported by City Council during the budget hearings. The funds for the study would come from savings gained by reducing the PFP increases recommended by the City Manager. The final adjustments would be completed as part of the Mid-year Review.

PROPOSAL FOR A REVIEW AND EVALUATION OF THE PFP EVALUATION SYSTEM FOR THE CITY OF DOVER



OCTOBER 25, 2007

MANAGEMENT ADVISORY GROUP, INC.

PROPOSAL CONTACT: CAROLYN LONG, PRESIDENT/CEO

Virginia/DC Area Headquarters
4207 Dale Boulevard
Woodbridge, Virginia 22193
Phone: 703.590.7250
Fax: 703.590.0366

Tallahassee Regional Office
1350-B Gadsden Street
Tallahassee, Florida 32303
Phone: 850.386.2711
Fax: 850.386.7180

www.maginc.info



MANAGEMENT ADVISORY GROUP, INC.

HUMAN RESOURCES CONSULTING SERVICES

October 25, 2007

Peter K. Gregg
Contract and Procurement Manager
City of Dover
710 William Street
Dover, DE 19904
pgregg@dover.de.us

Dear Mr. Gregg,

Management Advisory Group, Inc. (MAG) is pleased to present this proposal for a Review and Evaluation of the *PFP Evaluation System* to the City of Dover (City), in response to the City's RFP # R8006-JW-09/21/2007.

MAG, working as a sub-contractor to PAS, completed a comprehensive review of all job classes and current employees in 2003. MAG has retained a full database of employee information from this review, including all appeals and the resulting recommendations; current and proposed pay structures; current and proposed classification job titles; current and proposed classification assignment of employees; as well as current and proposed salaries. This database of information will permit MAG to have a unique perspective addressing the questions and concerns raised in the City's request for proposal as to the impact on salary progression and internal equity of the City's Pay for Performance System.

This database, in concert with MAG's unique ***Classification Manager®*** Software system will provide the City with a *quantitative analysis, rather than anecdotal review, of* the impact and effect of the performance evaluation system on City employee salaries, reclassifications and range progression. This will permit a direct side-by-side comparison of system change over the last four years.

MAG is a national, full-service human resources consulting firm with extensive experience in compensation and classification projects, job analysis and evaluation, employee performance evaluation systems, class description development, management and organizational reviews, personnel policy manual development, manpower analysis, productivity studies, adult education, training and certification programs, and human resources software.

MAG is a private corporation, incorporated in the state of Florida, and headquartered in Woodbridge, Virginia. Our consultant services are supported by a full complement of personnel, office space, and technological equipment required to meet our clients' needs. MAG is also a certified M/WBE (State of Florida); FEID#88-0495510.

MAG is prepared to modify the scope of services as needed, and we will be glad to discuss your needs in further detail as necessary.

Please feel free to contact me if you have any questions, or require clarification on any aspect of our proposal (703) 590-7250 and by facsimile at (703) 590-0366.

We appreciate the opportunity to be of service to the City and look forward to working with you on this important project.

Sincerely,



Carolyn Long
President/CEO
Management Advisory Group, Inc.

Virginia/DC Area Headquarters
4207 Dale Boulevard
Woodbridge, Virginia 22193
Phone: 703.590.7250
Fax: 703.590.0366

Tallahassee Regional Office
1350-B Gadsden Street
Tallahassee, Florida 32303
Phone: 850.386.2711
Email: alan@maginc.org

www.maginc.info

THE CITY OF DOVER

PROPOSAL FOR
A REVIEW AND EVALUATION OF THE PFP EVALUATIONS SYSTEM

TABLE OF CONTENTS

Transmittal Letter/Letter of Interest

Table of Contents

Section 1.0 – Firm Experience ..... Page 1-1

Section 2.0 – Methodology ..... Page 2-1

Section 3.0 – Cost ..... Page 3-1

Appendices:

SECTION 1.0

FIRM EXPERIENCE

Section 1.0 – Firm Experience

Our Company

Management Advisory Group (MAG) is a national, full-service management consulting firm, specializing in the human resources fields of pay and classification, performance management and rewards systems, and human resources policy, procedures and training. We are dedicated to providing our clients with creative and individualized, yet practical solutions to the unique challenges faced by public sector organizations. Our organizational mission is supported through the substantial and varied experience of our staff, enabling us to deliver an extensive range of services to a variety of public sector institutions and nonprofit organizations.

MAG's consultants possess extensive experience in compensation and classification projects, job analysis and evaluation, employee performance evaluation systems, class description development, management and organizational reviews, personnel policy manual development, manpower analysis, productivity studies, adult education, training and certification programs, and human resources software development and database management.

Our consultant services are supported by a full complement of support staff personnel, office space, and technological equipment required to meet our client's needs.

MAG is a private corporation, incorporated in the state of Florida, and headquartered in Woodbridge, Virginia with a regional office in Tallahassee, Florida.

Selected Areas of Expertise

- **Compensation and Classification**
  - Pay Equity and Comparable Worth
  - Point Factor Evaluation Systems
  - Broad Banding
  - Career Ladders and Lattices
  - Benefits
- **Performance Management Systems**
  - Pay-for-Performance Systems
  - Performance Based Salary Administration
  - Alternative Reward Programs
  - Individual & Group Recognition Programs
  - Management/Executive Compensation
- **Policies, Procedures and Training**
  - Personnel Ordinances and Policy Manuals
  - Recruiting and Hiring Guidelines
  - Employee Handbooks
  - Training and Certification Programs

Our Philosophy

MAG is committed to providing the highest level of professional human resources consulting services to our clients. Our team possesses extensive experience and skill in classification and compensation studies -- allowing us to assist our clients in meeting their organizational mission and goals on a variety of fronts.

MAG believes that organization efficiency and effectiveness is in large part dependant on recruitment and retention of quality, skilled personnel and staff -- human resources management systems are essential in today's world to accomplish organization objectives.

In support of this philosophy, MAG provides each of its clients with the software, licenses, manuals and training to ensure that our clients have the knowledge, skills and abilities to maintain their human resource systems.

Our Software

In our efforts to provide effective and efficient human resources consulting services, MAG has developed a suite of custom human resources software solutions, providing MAG's clients with the ability to maintain an integrated, high-quality compensation, classification, performance evaluation and employee rewards systems long after completion of the project. MAG has developed and uses the following software applications: ***Market Manager®, Classification Manager®,*** **and** ***Performance Manager®.***

Market Manager® is MAG's custom, web-based survey software that is designed to electronically collect job class, pay practice and related data of organizations that may compete with our clients for like classes of employees. Each survey instrument is customized to reflect and collect the specific data requested by our client, ensuring that the unique needs of the client organization are addressed as an integral part of each of MAG's studies.

In addition to providing a product tailored to each client, MAG has found that our automated, on-line approach allows marketplace organizations to provide data in an expedited manner. To express our appreciation to the market organizations for sharing their data, MAG provides each respondent with a summary report of collected data. This dual approach significantly increases our market response rate. The on-line approach also provides both MAG and the client with the ability to view real-time data, ensuring that any data anomalies are addressed long before the comparable market analysis begins; saving both time and money.

To ensure that all data analysis activity compares "apples to apples," ***Market Manager®*** has internal controls that normalize survey data for employee groups that work non-standard work hours, such as instructional/educational personnel, allowing the client to directly compare compensation packages for either work hours or work days of employees within the agency and across the competitive marketplace.

In addition to implementing targeted surveys, ***Market Manager®*** maintains an extensive library of current market information that can be accessed to support any market survey study undertaken on behalf of our clients. This powerful tool provides the information necessary to design compensation packages that reflect reality in the marketplace; putting the client's organization in a competitive posture to recruit, retain and motivate employees.

The flagship of our software package, ***Classification Manager®,*** is like having a human resources department on your PC. ***Classification Manager®*** designs custom pay structures, assigns employees to job classes, documents your FLSA decisions ensuring compliance with due diligence requirements, and provides extensive reports and forecasting scenarios to assist in developing management or labor compensation strategies. ***Classification Manager*** ® is an invaluable tool for forecasting as well as proving internal pay equity. ***Classification Manager®*** can be used with our proprietary system or easily adapted to use your existing system of job classification.

The third prong to our unique approach to human resources management targets employee performance. MAG understands that managing performance is one of the toughest challenges faced by public sector employers and, in response, has designed and developed ***Performance Manager®*** to effortlessly link people, pay and performance.

Performance Manager® shares a common database with ***Classification Manager®***, resulting in a fully integrated, custom designed pay delivery and rewards system. By adding the strength of this package, the client organization is able to design the goals and outcome measurements for each individual employee, building off of the job classification data already present in ***Classification Manager®.*** The system can be used in a traditional supervisory-subordinate review process or, with a click of the mouse, be modified to include a 360-degree evaluation process with multiple reviewers. This feature is critical to managing trainee or probationary periods when a single employee may have multiple supervisors who provide input during the review period.

In order to pull all of the pieces together, ***Performance Manager®*** includes a sophisticated budgeting and forecasting tool that calculates and provides a variety of funding options, ensuring that all aspects of the client's classification, compensation and evaluation systems are fully integrated and reflect the current realities of the client's fiscal resources.

Our Professional Consulting Staff

MAG will provide total project management and administrative oversight and will be the primary consulting team. Ms. Carolyn Long, President and CEO, has extensive project management experience as well as over 20 years of experience designing and installing position pay and classification plans and computer-supported performance management and reward systems. Ms. Long will serve as Partner in Charge and be designated to act as the primary liaison between MAG and the City.

Ms. Long will be assisted on this study by a team of professional consultants who have worked extensively together for the past four years to design, develop, and implement highly competitive, innovative, state-of-the-art pay and classification systems.

Carolyn Long, CPC, President & CEO, Authorized Representative, MAG. Ms. Long will be MAG's Partner-in-Charge for this project. Ms. Long has extensive experience in public management consulting and has served as project director for more than 250 human resources management studies; successfully directing over 50 studies in the last three years. Prior to joining MAG, Ms. Long was a Partner with MGT of America, Inc. as well as the Partner-in-Charge of the firm's Human Resources Management Consulting Division. In this role, she developed the company's human resources practice area, its forms, software, and processes, and directly managed all large human resources management projects. She was also vice president of David M. Griffith (DMG, now Maximus), a national management consulting firm, and served as the Vice-President of the Human Resources Management Consulting Division and directed scores of major compensation and classification and general management studies across the nation.

Ms. Long is recognized by the courts as an expert witness in the area of pay equity and comparable worth, and is a Certified Professional Consultant. Ms. Long served on the senior staff of the International City Management Association (ICMA) in Washington, D.C., and as national director of conferences and membership for ASPA, also in Washington, D.C. Ms. Long was an assistant professor in charge of Government Career Development Programs for Florida Atlantic University. Ms. Long holds a bachelor's degree from Florida Atlantic University, where she has also completed graduate studies in public administration.

Alan Johnson, Senior Vice President, Authorized Representative, MAG. Mr. Johnson will assist with database transactions for this project and provide technical support to enhance data management functions. Mr. Johnson will serve as a consultant for this project and will be available to provide a ready response to answer questions or meet with staff. He has more than 20 years of experience with consulting, analysis, programming, on-site and classroom training, and on-site and telephone support of computer applications. Prior to joining MAG, Mr. Johnson served as MGT of America's Director of Technology and Training for the City of Oklahoma City, Oklahoma; the City of Chesapeake, Virginia; the City of La Porte, Texas; the Cherokee Nations (Oklahoma); and dozens of other similar human resources management studies for public sector entities. Mr. Johnson has recently completed the development of a personalized performance management system for public employers. Mr. Johnson also has extensive experience with database management and computer instruction, having taught courses at George Brown College in Toronto and the DeVry Institute of Technology in North York, Ontario. Mr. Johnson has also created and directed training and support departments for software development companies and accounting software developers. He holds a bachelor's degree in Business Administration from Florida International University.

Donald C. Long, Ph.D., Executive Vice President, Authorized Representative, MAG. Dr. Long has over 23 years of experience providing management assistance to elected and appointed officials in the areas of management and organizational reviews, program evaluations, public policy/productivity, strategic planning, human resources, public safety services, and other related management areas. He has provided public sector management and financial consulting assistance to over 200 governmental and nonprofit agencies in a variety of service areas, including management research studies for cities, counties, and public agencies in the area of organization and management, human resource systems, program evaluations and productivity studies, staffing and cost-benefit analysis, and strategic planning. Dr. Long possesses a Ph.D. in Public Administration and Finance.

Rita Haugabrook, Consultant, MAG. Ms. Haugabrook has experience in a variety of management positions in the public and private sectors. Ms. Haugabrook has considerable expertise in strategic planning, budget development, financial management, proposal development, research, organizational analysis and development, human resource and procurement. Ms. Haugabrook has a wide range of professional human resources experience including: employee performance evaluation, job analysis, pay plan development, salary and benefits surveys, and classification and compensation studies. Ms. Haugabrook has also worked on scores of human resources consulting projects, including City of Port St. Lucie, Memphis City Schools, Tallahassee Community College, and Lake County Board of County Commissioners. Ms. Haugabrook has a B.A. in French and a B. A. in Spanish from Florida Agricultural and Mechanical University. In addition, Ms. Haugabrook possesses M.S. in International Affairs from Florida State University.

Cathy Dubose, Consultant, MAG. Ms. Dubose assists in the development of compliance-ready class descriptions, and job analysis, as well as managing the appeals process. Ms. Dubose has also worked on scores of human resources consulting projects, including the Charlotte County Public Schools, Florida; as well as Memphis City Schools; Columbia Public Schools, Missouri; and the City of Daytona Beach. Ms. Dubose has a Bachelor's degree in Linguistics from Florida State University.

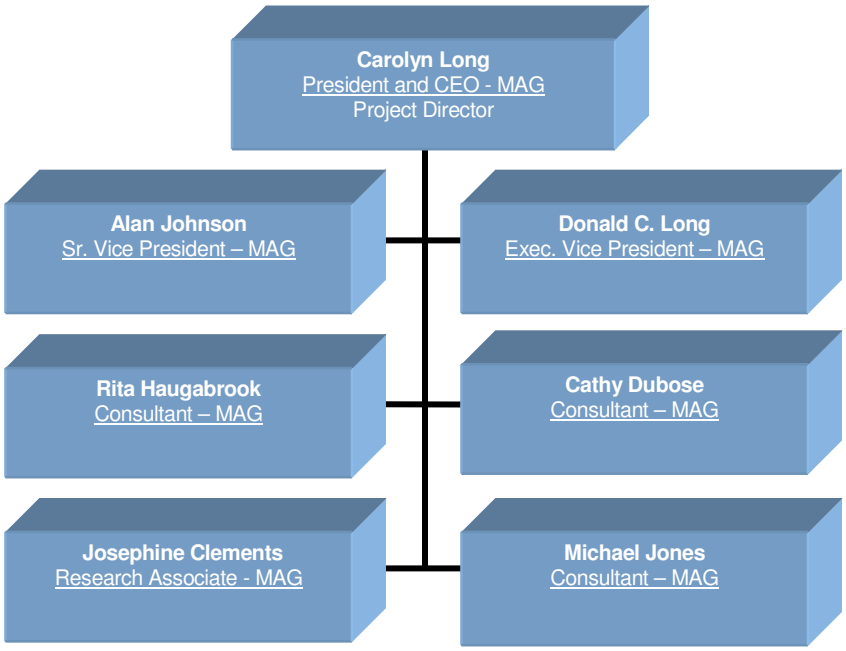
Michael Jones, Consultant, MAG. Mr. Jones has over twenty-five years experience in a variety of management positions in both the non-profit and private sectors. Corporate management assignments have included highly responsible human resources financial management positions with Capital Pension Services, Exxon Mobil and the Langley School, among others. As a result of these experiences, Mr. Jones brings considerable expertise in financial management, negotiations, proposal development, information systems, research, organizational analysis and development in the fields of human resource planning and human capital management. Mr. Jones' work with MAG includes market review and analysis, financial planning, on-site interviewing, job analysis and financial forecasting.

Josephine Clements, Research Associate, MAG. Ms. Clements has worked on scores of human resources consulting projects, and specializes in salary, wage, and benefits survey database development including: survey targets, benchmarks, and survey instrument development; database cleaning and review; job analysis; and survey management. Ms. Clements has a Bachelor's degree from Florida State University.

MAG's proposed project staff organization chart follows and detailed resumes are located in the Appendices.

In addition, MAG has any number of consultants that can bring highly specialized skills to this project. Should it become necessary to bring other skills sets to the project, MAG would first submit resumes for client approval.

THE CITY OF DOVER
MANAGEMENT ADVISORY GROUP
PROPOSED PROJECT CONSULTANTS



Our Experience

MAG's partners have successfully managed more than 300 client engagements in 22 states. The proposed project team in MAG's human resources practice has worked together for over six years and has provided human resources services nationwide, as a team, for such varied government agencies as:

- City of Richmond, Virginia – 3,000 employees;
- City of Chesapeake, Virginia – 2,500 employees;
- City of Daytona Beach;
- Columbia Public Schools (Missouri);
- Memphis City Schools (Tennessee);
- City of Opelika (Alabama);
- City of Roswell, GA;
- Newton County, GA;
- Florida Department of Children and Families;
- Clay County Board of County Commissioners; and,
- Lake County Board of County Commissioners, Florida.

Following is a partial list of client references for which MAG consultants have conducted human resource studies during the last six years.

References for MAG

➢ **City of Chesapeake, Virginia.** Ms. Long conducted a Comprehensive Compensation and Classification Study for the City of Chesapeake in 2001, completing the final review process in October, 2001. The study included analyzing individual jobs to develop an internal ranking and classification of over 535 City positions encompassing over 4,000 employees, surveying the labor market to develop competitive salary ranges for each position, and developing class descriptions with Americans with Disabilities Act compliance-readiness criteria. Ms. Long did extensive work with the City in developing a Compensation Philosophy that was adopted by the City Council.

Contact: Patrick Molnar
HR Operations Director
PO Box 15225
Chesapeake, VA 23328
(757) 382-6373
pmolnar@mail.city.chesapeake.va.us

Project Director: Carolyn Long

- **City of Opelika, Alabama.** MAG conducted a Classification and Compensation Study for 433 employees in 156 classifications in the City of Opelika, Alabama, completed in 2005. The study included a comprehensive review of all classifications, development of a point-factor system that provides a cohesive and comprehensive way to classify City jobs, a comprehensive survey of the labor market comparables among public sector employers of comparable size, and the development of an equitable compensation plan. MAG also provided an organizational study of all municipal departments, that included revised organizational structures, staffing recommendations, and transfer or elimination of functions as deemed appropriate.

Contact: Lisa McCloud
Human Resources Director
City of Opelika, Alabama
(334)-705-5130
LMcLeod@ci.opelika.al.us

- **City of Bowling Green, Kentucky.** MAG conducted a comprehensive classification and pay plan study for the City of Bowling Green in 2003. The study included a salary and benefits survey, an update of job descriptions, job analysis, recommendations for a market based pay and classification plan that is both internally and externally equitable, the development of several implementation cost scenarios, and training for City human resources personnel on proposed plan administration and maintenance.

Contact: Michelle Tolbert
Director of Human Resources
City of Bowling Green Human Resources Dept.
1001 College Street
Bowling Green, KY 42101
Ph: (270) 393-3000
Fax: (270) 393-3298

Project Director: Carolyn Long

- **Washington Council of Governments.** MAG consultants conducted a Compensation and Classification Study for employees of the Washington (D.C.) Council of Governments. The objectives of the 2006 study included developing a compensation plan to help maintain externally equitable and competitive salaries for all classifications. The labor market included local governments in the greater Washington area as well as Council of Government agencies in large metropolitan areas.

Contact: Imelda Roberts
Human Resources Director
777 North Capitol Street, N.E. Suite 300
Washington, D.C. 20002-4239
202-962-3240

Project Director: Carolyn Long

➢ **Memphis City Schools, Tennessee** is in progress, with 8,000 employees in over 600 job classifications. MAQ is conducting a comprehensive classification and pay plan study Memphis City Schools. The study includes a salary and benefits survey, an update of job descriptions, job analysis, recommendations for a market based pay and classification plan that is both internally and externally equitable, the development of several implementation cost scenarios, and training for City human resources personnel on proposed plan administration and maintenance.

Contact: Chanda Brooks
Compensation Analyst
Memphis City Schools
Memphis, TN
901- 416-1488
brooksc@mck12.net

Project Director: Carolyn Long

Partial Client List for MAG

Alachua County, Florida
Baltimore County Community College, Maryland
Black Hawk College, Illinois
Brevard County, Florida
Broward County, Florida
Carson Products, North Carolina
Charleston Housing Authority, South Carolina
Chatham County, North Carolina
Chester County, Pennsylvania
Citrus County, Florida, Sheriff's Department
City of Grand Prairie, Texas
City of Alexandria, Louisiana
City of Asheville, North Carolina
City of Bal Harbour, Florida
City of Bay Harbor Islands, Florida
City of Belleview, Florida
City of Brooksville, Florida
City of Cape Coral, Florida
City of Cayce, South Carolina
City of Cocoa Beach, Florida
City of Columbia, Missouri
City of Coral Springs, Florida
City of Davie, Florida
City of Destin, Florida
City of Eustis, Florida
City of Greenacres, Florida
City of Hammond, Louisiana
City of Holly Hill, Florida
City of Indian River Shores, Florida
City of Johnson City, Tennessee
City of Kalispell, Montana
City of Lake Park, Florida
City of La Porte, Texas
City of Oak Ridge, Tennessee
City of Oklahoma City, Oklahoma
City of Palm Bay, Florida
City of Pascagoula, Mississippi
City of Pointe Coupee, Louisiana
City of Portsmouth, Virginia
City of Riviera Beach, Florida
City of San Francisco, California
City of Sarasota, Florida
City of Satellite Beach, Florida
City of Sevierville, Tennessee
City of Stuart, Florida
City of Tamarac, Florida
City of Wilton Manors, Florida
Collier County, Florida, Sheriff's Office
Dallas Independent School District, Texas
Dougherty County, Georgia
Fairfax County Public Schools, Virginia
Florida Department of Citrus
Haywood County, North Carolina.
Huntsville City Schools, Alabama
Jacksonville, Florida, Transportation Authority
Lake County, Florida, Sheriff's Office
Lee County, Florida, Tax Collector
Manatee County, Florida
Marion County, Florida, Tax Collector
New Hanover County, North Carolina
Nez Perce Indian Tribe, Idaho
Massachusetts Community Colleges, Mass.
North Carolina Department of Juvenile Justice
North Miami, Florida
Okaloosa County, Florida
Ouachita Parish, Louisiana
Palm Beach County, Florida, Schools
St. Johns County, Florida, Property Appraiser
Town of Ponce Inlet, Florida
Wayne County Airport Authority
Baltimore County Public Schools, Maryland
Bastrop County, Texas
Brevard County Sheriff's Office, Florida
Broward County, Florida, Sheriff's Office
Charleston County, South Carolina
Charlotte County, Florida
Cherokee County, North Carolina
Citrus County, Florida
Citrus Hills Investment Corporation
City of Acton, Massachusetts
City of Altamonte Springs, Florida
City of Atlanta, Georgia
City of Baton Rouge, Louisiana
City of Belle Glade, Florida
City of Boynton Beach, Florida
City of Bowling Green, Kentucky
City of Brownsville, Texas
City of Casselberry, Florida
City of Chesapeake, Virginia
City of Colonie, New York
City of Cooper City, Florida
City of Dania, Florida
City of Daytona Beach, Florida
City of Dover, Delaware
City of Dunedin, Florida
City of Fairborn, Ohio
City of Gulfport, Florida
City of Highland Beach, Florida
City of Hollywood, Florida
City of Jacksonville Beach, Florida
City of Juno Beach, Florida
City of Kenosha, Wisconsin
City of Lake Worth, Florida
City of Mount Dora, Florida
City of Mount Pleasant, South Carolina
City of Naples, Florida
City of Ocala, Florida
City of Ormond Beach, Florida
City of Pantego, Texas
City of Pembroke Pines, Florida
City of Port Orange, Florida
City of Richmond, Virginia
City of Safety Harbor, Florida
City of Sanibel, Florida
City of South Daytona, Florida
City of Tallahassee, Florida
City of Wellingtonc, Florida
City of Williston, Florida
City of Winter Park, Florida
Corpus Christi Airport, Texas
Davidson County, North Carolina
Escambia County, Florida, Utilities
Florida Community College at Jacksonville
G.E.O. Services, Inc
Hernando County, Florida
Iberia Parish, Louisiana
Lake County, Florida
Lake Worth, Florida, Utilities
Levy County, Florida, Property Appraiser
Los Angeles Housing Authority, California
Marion County, Florida, Sheriff's Office
Nineteenth District Court, East Baton Rouge, Louisiana
Northampton County, Virginia
North Miami Beach, Florida
Orange County, Florida, Public Schools
Palm Beach County, Florida Clerk of the Circuit Court
Palm Beach County, Florida, Sheriff's Department
Tift County, Georgia
Town of Lauderdale by the Sea, Florida

SECTION 2.0

METHODOLOGY

Section 2.0 – Methodology

Project Understanding

MAG understands that City of Dover (City) seeks a review of its total compensation as it relates to the City's Pay *for Performance Evaluation System*. MAG has carefully reviewed the RFP and has prepared a detailed response and approach for each objective outlined by the City. For ease of review, MAG has set up the work plan to correspond with the services requested by the City and has followed the outline provided in the RFP. MAG has taken the liberty of combining some questions that appear to "build" on each other or to be closely related.

The proposed services would include:

1. Is the system meeting its purpose; specifically,

a. Is the system providing equitable compensation?

MAG will assist the City in re-defining the compensation philosophy that is the foundation of the City's Pay for Performance system. Only with a clear set of compensation objectives can the City determine if the system is providing equitable compensation. In addition to identifying compensation objectives, MAG's newest edition of its unique and proprietary software, ***Classification Manager®***, has built-in utilities that will allow the City to assess disparity in compensation values between and among employees. Using a comparison of salary values, length of service and performance ratings, MAG can work with the City to determine if the results of the Pay for Performance system have, in fact, met the goals of the City.

b. Is the system working to retain quality employees or are we losing them to competitors?

MAG will work with the City to identify those employees who have left the City within recent time and develop a matrix from the information available to determine the dominant reason, by job class, for employee turnover. While anecdotally remaining employees may perceive that compensation was the dominant factor in turnover, there are many factors the City should consider in weighing the impact of turnover on the overall goals and objectives of the City's Pay for Performance system.

Such factors driving employee turnover need to also be reviewed in light of other issues. Consideration needs to be given to the cost of recruitment, the relative ease or difficulty of replacing different job classes and the impact of turnover on the service level. While a certain category of jobs may, indeed have a higher than desirable turnover rate, a low replacement cost, a relative short "learning curve" for the job, and the availability of qualified applicants in the labor market may place jobs at different market priorities.

c. Is the system working to recruit quality employees?

MAG will conduct an internal survey, using a forced-choice "Likert scale", of supervisors where turnover has occurred during the previous 12 months, to assess their view of the quality of the newly recruited employees. MAG will also include the performance ratings for any new employees who have also been reviewed since the time of hiring. This will provide a "snap shot" of how supervisors view the quality of new hires, as well as provide some confirming information on the actual performance of actual new recruits.

d. Are the new recruits staying with the city?

This information would be included with the available information outlined in Item B above. It is important that there be recognition that not all turnover is due to compensation and not all turnover impacts the City's objectives and service levels in the same way.

Given the City's financial resources, MAG will provide the City with solid information that will assist the City in prioritizing the impact of compensation on turnover and recruitment. With this information, the City can make informed decisions regarding strategies and options for addressing concerns that might be identified.

The following City objectives are grouped:

e. Are we getting results based performance due to rewarding better performance?
f. Are employees more goals oriented under this system of evaluation?
g. Are employees more motivated to perform better under this system?

While an on-line survey would be easier and less time consuming, MAG would recommend an approach using a series of on-site focus group workshops. MAG would meet with multiple representatives of each occupational group to answer these key questions. In addition, our structured workshop process would also permit unstructured time for employees to have free and frank discussion of their perception of the effectiveness of the Performance Evaluation System.

In this manner, MAG will be able to provide the City with both analysis of the effectiveness of employee perception of the Performance Evaluation System as well as employee insight regarding any issues that could be missed in an impersonal survey.

The following City objectives are grouped:

h. Has the Pay for Performance system brought Dover's entry level salaries into closer conformity with local market comparable salary positions?

2. Is Pay Plan Maintenance working; specifically,
   a. Are the market based surveys maintaining salaries with the market?
   b. Is there any indication that salaries are moving ahead of the market?
   c. Is there any indication that salaries are moving behind the market?
   d. Is there any evidence indicating that employees at higher salary levels are advancing faster or slower than lower salaried employees?

This objective of the City focuses on the relationship externally of actual salaries paid by the City and their relationship to actual salaries paid in the market. (External relationship of actual salaries paid).

Additionally, once external market relationships were identified, MAG would review the internal salary relationships, comparing the rate of advancement of the current system between lower level employees and those compensated at a higher rate. (Internal relationship of actual salaries paid and the impact of the compensation policies on rates of salary advancement.)

e. Does the local market survey currently being performed by the Human Resources Department correspond with the original market survey methodology that was used to establish the new pay grades and ranges in the original PAS study?

MAG will carefully compare the methodology used in the original market survey with that currently being used by the Human Resources Department. MAG will note any differences in the methodology, if applicable. Additionally, MAG will also note any changes that might be suggested in current/future survey methodology based on the results of the review and analysis of the compensation objectives and Performance Evaluation Plan.

The following City objectives are grouped: (some of the following are taken "out of order")

3. Are performance evaluations and advancement goals being met?
   a. Are all evaluations being completed in accordance with the policy?
   b. Are clear goals being established meeting the SMART criteria?
   e. Is the scoring system working to differentiate better performance?
   f. Have the goals and objectives that are now included in the annual strategic statements for each department been regularly incorporated into the goals and objectives of the individual employees working in the department?
   g. Are the employee's goals and objectives being reviewed quarterly?

4. Are the "Quality Control" systems working?
   a. Are evaluations being fairly administrated across departments?
   b. Is scoring consistent across departments?
   c. Is the Human Resources department reviewing evaluations?
   d. It is being administered fairly or if it is divisive; to examine the various documents that have been presented over the years; to question why some of the changes have taken place; to gain an understanding of how people move through the system; how they are re-graded or re-titled.

MAG proposes to work with supervisors, Department Heads and key stakeholders on a series of workshop sessions to allow for input on these critical questions. Clearly, there is concrete analysis that MAG will perform to determine policy compliance for the evaluation process. However, it is also equally clear that the perception of fairness and equity within the process is also a question of critical importance to the City and to the employees. Again, while an impersonal survey would be easier, MAG proposes to provide for a series of facilitated workshops to meet personally with key leadership positions and stakeholders to evaluate issues, concerns and to address options and strategies.

Ultimately, a Pay for Performance system must meet both organizational goals as well as provide an opportunity for personal achievement and reward. Without this balance of both perception and reality, the system will, at best, miss the market of providing the desired incentive, and, at worst, prove to be a disincentive.

c. Are "below market" employees advancing to "at market" at the expected rate?
d. Has the system reduced or eliminated the number of employees above the maximum and prevented employees from advancing above the maximum?
c. Are the employees in the program benefiting more than those who are not and, if so why, and if not, why not?

MAG will utilize our ***Classification Manager®*** software system to analyze the current employee information and to produce reports as to where employees are in the system (compa ratio) and where their expected target salaries should be based on the enormous database of criterion established by MAG through hundreds of similar studies.

MAG's analysis of employee information will provide quantitative and objective information regarding the relative relationship of salaries for employees both in the performance system and those who are not. Again, MAG's analysis will be based on the precise experience (salaries, length of service, performance ratings) of employees in the City of Dover who are in the performance plan and those who are not. This will provide the City with an unequivocal, fact based comparison of these different categories of employees (those "in" and those who are not).

5. Are procedures for new job titles/grades, re-grading, and re-titling being followed?
a. Are new employees being placed properly within salary ranges?
b. Have re-titling and re-grading been merit based?
d. Whether or not the evaluative criteria is being administered fairly and advancing the mission of the organization.

MAG has retained the City of Dover's job information database from the 2003 study. It will be relatively easy to track job titling and grade placement changes by comparing the 2003 database with a 2007 database.

This will permit the City to review the changes in job class placement, titling and employee movement between two fixed points in time. The analysis of this comparative data will be helpful in identifying job title or grade placement changes that cannot be supported by changes in the work or in the market.

While MAG fully and completely understands that the environment in which the City functions is not static, MAG has the unique ability to compare two fixed points in time and place will provide a quantitative perspective of "what was" compared to "what is".

It is important to the integrity of the process that the Departments requesting new titles or reclassification of employees can fully support the requests with defensible changes in the work or in new organizational needs.

While not at all an indicator of impropriety, reclassification of incumbents who were at or about the top of the range will be carefully examined to determine that there was complete and substantial documentation of range assignment or job change. Most, if not all, of these changes will undoubtedly be fully supported. However, it is critical to the perception of employees that the creation of new positions and the reclassification of existing positions and/or incumbents are handled entirely without prejudice or favor.

6. Is the appeal process working?

This question will be raised in the workshop/focus group sessions to elicit insight and input from employees as to their perception of the appeals process.

a. Have there been a high number of appeals?

MAG will review the number of appeals and their outcomes. MAG will base the City's number of appeals/per employee to MAG's extensive database and experience in implementing similar studies, thus providing the City with a benchmark reference point for comparing the number of appeals the City receives to our standards when implementing new titles, pay range changes and reclassifications in other public sector agencies and organizations.

b. Do appellants feel that they have been treated fairly?

While MAG can ask this question of appellants, it is probable that those employees with a favorable outcome would rate the system as being more equitable and fair than those who did not receive a favorable outcome. In this instance, MAG would prefer a simple blind-survey of appellants rather than any open workshop or focus group that might identify individuals and the results of their appeal.

7. Are we properly training evaluators?

MAG will review the training materials used for sufficiency and adherence to generally accepted standards. MAG will also review the training syllabus and the amount of time allocated for supervisory training, both at a single session, and overall as to the frequency of training sessions held.

a. Are we following the training guidelines?
b. Do evaluators feel as though they are being properly trained?

MAG will determine if there is any documentation which is provided to employees at the time of evaluations that allow the reviewed employee to provide "blind" feedback on the evaluation process. MAG will explore, though the focus group/workshop process the extent to which supervisors feel they have received sufficient and on-target training in handling the evaluation process.

In the absence of such documentation, MAG will work with the Human Resources Department and appropriate trainers to create a feedback opportunity for both the evaluators on the training process and for the employees on their evaluation experience.

SECTION 3.0

COST

Section 3.0 – Cost

Project Cost

MAG has developed a project budget for the City of Dover based on our proposed scope of services.

*MAG is pleased to offer the City the scope of services as described herein for the fixed fee of **$34,965**.*

Suggested Indemnification Language

Consultant agrees, to the fullest extent permitted by law, to indemnify and hold harmless the City from any amounts (including reasonable attorney's fees) for which the City shall become legally obligated to pay as damages for negligent acts, errors, and/or omissions of the Consultant arising out of the Consultant's performance under this Agreement; however, the amount Consultant will pay for damages is limited to $1,000,000, which number is intended to reflect the limits set forth in Consultant's liability insurance.

Payment

One-quarter (25%) of the total fee will be payable upon contractual agreement to proceed. Ten percent (10%) of the total contract amount shall be held back - payable upon successful completion of the project. Additional payments will be due and payable in accordance with monthly invoices based upon work performed toward delivery of final reports and products as described herein.

Exceptions

MAG stipulates that our proposed workplan, methodology, personnel hourly rates and fee structure, financial statements, software systems (including descriptions and screen shots), project documents, forms and questionnaires are all proprietary and confidential, and are not subject to disclosure. All software and code remain the sole property of MAG.

APPENDICES

LETTERS OF REFERENCE
"QUOTES"



MANAGEMENT ADVISORY GROUP, INC.

Virginia **Florida** **North Carolina**

Okaloosa-Walton College, Nancy Murphy, Director of Human Resources….

"MAG was in our local newspaper today! I see where you are working with the City of Fort Walton Beach… Gives OWC more creditability that we selected the right company to conduct our compensation study!

Thanks again for all you did…"

City of Oviedo, Barbara Faulk, Employment Coordinator….

"…It's really nice to know that we can pick up the phone and get answers to our questions. Please make sure Alan knows how grateful I am for his cooperation and assistance."

Newton County Board of Commissioners, John Middleton, Administrative Officer….

"We appreciate the work MAG has done for us and look forward to working with you all in the near future once again."

City of Roswell, Diane Taylor, HR Programs Manager….

"Your system is so easy to use."

Virginia Beach Public Schools, David Staley, ….

"I have nothing but great things to say about MAG. Despite a challenging timetable, they provided a high quality product which exceeded my expectations."

City of Opelika, Honorable Mayor Gary Fuller….

"I'm writing to express how pleased we are with the services your company recently provided to the City of Opelika."

"This task could not have been accomplished without the diligent efforts of… Mr. Calvin Grissett. I was pleased with the professionalism that these individuals demonstrated throughout the process."

"I appreciate the extra effort your company gave in ensuring the Opelika City Council was briefed and made comfortable with the new system."

"The City of Opelika looks forward to future projects with your company."

City of Moultrie, Dale V. Williams, CHRM, Director of HR/Risk Management….

"I found the MAG employees responsible for the City of Moultrie project, to be very professional and knowledgeable."

"They were adapt at keeping us on task and meeting deadlines."

"Because of their proactive approach, I would recommend the MAG Agency without question."

Louisiana Community & Technical College System, Laura A. Kamiya, SPHR, Director or Human Resources….

"The review committee felt that Management Advisory Group, Inc. (MAG) proposal contained all the required elements, experience in conducting similar studies, an understanding of the scope of the project, sound design and methodology, and a responsible cost for effort to be expended."

"MAG is the highest scorer out of the eleven proposers."

Daytona Beach Community College, Laurance R. Sandstorm, Associate Vice President of Human Resources….

"…the study remained within appropriate scope and was completed on a timely basis."

"The entire team was receptive and responsive to ideas and feedback from Human Resources staff, college employees, and senior administrators."

"Our experience ….has proven that the original project was not only well designed but is also very cost effective."

Baltimore County Public Schools, Michael J. Goodhues….

"Ms. Long and her project team worked with Baltimore County Public Schools to complete a demanding project in a short time. The recommendations of the project team were adopted by Baltimore County Public Schools. Software provided by the

project team is still in use by the BCPS."

"I would recommend Ms. Long and her staff be considered by any public school system interested in conducting an employee compensation and classification study."

Dover Post, Wednesday, Aug. 21, 2002
By Jim Flood Sr.
Publisher

"Dover's City Council did the right thing last March in hiring Management Advisory Group, Inc., to review the organization of Dover's government. It showed foresight and a certain amount of courage. Who could tell what the recommendations of this outside body might be?

"With that said, how well did the expert examiners do their job? Quite well, in this corner's opinion. While it is a given that the report has no chance of being adopted in to, there is sound logic to many of the recommendations and city council should carefully examine all of them before making decisions. There is logic and reason in the approach of the Management Advisory Group staff."

The City of Oklahoma City, Dianna L. Berry, Personnel Director….

"Thank you for the professional services you provided to us in conducting the comprehensive compensation, classification, and benefits study for the City of Oklahoma City."

"Your interest in our organization was evident from the outset of the project to the end, and we wish to express our sincere appreciation."

"… we were impressed with your enthusiasm, flexibility, and creativity in responding to our expectations and providing viable recommendations to us."

"We believe that the study recommendations will result in better recruitment and retention of employees."

Columbia County Property Appraiser, J. Doyle Crews, CFA….

"The Salary Survey has proved to be an excellent tool in requesting salary increases for my staff. I have been impressed with the whole process involved in the survey, from the initial meeting … "

"I want to also tell you I was especially pleased with Calvin Grissett and the professionalism he has shown throughout the business relationship we have had with your company."

"I am looking forward to future business with your company."

Cherokee County Commission Board, Barbara P. Vicknair, Chairman….

"We are finalizing our review of the draft documents at this time and have found both reports to be quality products that are responsive to the County's needs."

"We appreciate the timeliness of the work and your willingness to incorporate suggestions and recommendations from the Board into the report."

"We look forward to completing this study and the opportunity to work together in the future."

Citrus County Board of County Commissioners, Dwight L. Small, Human Resources Director….

"Mr. Grissett was unfailingly responsive and cooperative by going well beyond normal expectations in his willingness to help us. He was always plesant and concerned and never displayed the slightest impatience with our demands."

"Please convey our sincere appreciation to Calvin for his invaluable contributions."

Citrus County Florida Tax Collector, Norine S. Gilstrap, CFC….

"The study itself was very thorough and extensive, the few times that changes were requested they were resolved quickly."

"Based on my association with Carolyn Long over the past few years I have found her to be most professional, knowledgeable and competent in her approach to her work."

Dougherty County Georgia Board of Commissioners, Alice Goseer-Jenkins….

"We have received the draft report of the Compensation and Classification for Dougherty County. Following our internal review, we find this to be a very comprehensive document, and on that specifically addresses to our local concerns and issues."

"It is apparent the work done for us has not been just an "off the shelf" piece of work already done for someone else."

"You have continued to be flexible, offering us several options on most issues instead of only one recommended outcome."

"We have also been pleased that the critical deadlines that were mutually set for various major pieces of the project have been met."

Virginia Beach Public Schools, David Staley, Assistant Superintendent of Human Resources (questionnaire)….

What recommendations/advice do you have regarding this consultant?
"Hire her!"

CAROLYN LONG
PRESIDENT AND CEO

Ms. Long has over 25 years' experience providing human resources and general management consulting for hundreds of local government agencies. She has directed numerous innovative and comprehensive management studies in a variety of functional areas, which have resulted in savings and efficiencies for local governments. Ms. Long has completed numerous benefits and classification studies using a variety of technical evaluation systems, including factor evaluation and point ranking classification systems, directed the development of comprehensive class specifications, innovative pay administration plans, personnel policy manuals and employee handbooks, and implemented numerous pay-for-performance and total quality management systems for local governments. She has also served as a human resources national director for national consulting firms, conducted national human resource training workshops, and has practice management responsibilities for Public Administration Service Human Resources consulting practice. The courts also recognize her as an expert witness in the area of compensation, classification and pay equity.

PROFESSIONAL EXPERIENCE

Management Advisory Group, President and CEO, June 2001–Present. Tallahassee, Florida.

Public Administration Service, Director of Human Resources Management Consulting, October, 2001–Present

MGT of America, Inc., Partner, April 1998–September 2001; Senior Associate, 1998.

David M. Griffith and Associates, Ltd., Vice President, 1994–1998.

Long Associates, Inc., Founding and Managing Partner, 1981–1994.

Management Improvement Corporation of America, Regional Manager, 1979–1981.

McClure—Lundberg Associates, Regional Manager, 1977–1979.

American Society for Public Administration, Director of Conferences, Membership and Chapter Development, 1976–1977.

International City Management Association, Senior Staff Associate, 1974–1976.

Florida Atlantic University, Boca Raton, Florida; Director and Assistant Professor, Government Career Development Programs, 1972–1975.

City of Delray Beach, Florida, Personnel Officer, 1969–1972.

PROFESSIONAL BUSINESS EXPERIENCE

Human Resources Studies

Partner-in-Charge of a classification and compensation study and organizational review for the City of Bowling Green, Kentucky.

Partner-in-Charge of a classification and compensation study and organizational review for the City of Sevierville, Tennesee.

Partner-in-Charge of a classification and compensation study and organizational review for the Detroit/Wayne County Airport Authority

Partner-in-Charge of a classification and compensation study and organizational review for the City of Dover, Delaware. She conducted a City-wide compensation and classification study and a organizational review for the City of Dover in 2002. This study for Delaware's capital city included three important areas of work: the Classification phase of the study, including the revision of job descriptions, and the Compensation phase of the study, and the Organizational Study. The Organizational Study reviewed staffing, duties, performance, and organization.

Partner-in-Charge on a classification, compensation, performance appraisal, and staffing study for the Town of Ponce Inlet. The classification and compensation reviews were conducted using **Classification Manager©** and **Market Manager©**. The performance appraisal system was implemented using **Performance Manager©** performance evaluation software and documentation.

Partner-in-Charge on a project for the St. Johns County (FL) Property Appraiser's office. The study included a salary survey and job analysis for all executive staff.

Partner-in-Charge for a comprehensive classification, compensation, and benefits study for the City of Oklahoma City, Oklahoma. The study provided detailed recommendations for approximately 4,200 employees distributed among 400 classifications. In constructing the compensation plan, the project team evaluated alternative systems proposals.

Partner-in-Charge for a comprehensive classification, compensation, and benefits study for the Huntsville City Schools (AL). The study included instructional and non-instructional staff. The number of employees covered in the study was more than 3,000.

Partner-in-Charge of a project for the Baltimore County Public Schools in developing a computer-based compensation structure for supervisory and technical employees. After developing a revised compensation and classification plan, provided training to the Compensation Committee and Human Resources.

Partner-in-Charge of a comprehensive and customized pay and classification study for the City of Chesapeake, Virginia. Analyzed the specific duties, responsibilities, and job requirements of each of the City's 4,000 positions as well as an assessment of the need to create new or revised class descriptions; an analysis of every job within the City to determine its relative worth within the organization (internal equity) and in comparison to like or similar jobs in the labor market in which the City competes for a labor supply (external equity); an analysis of the wage and salary information and the job evaluation data to determine an equitable and appropriate pay and classification plan for the City.

Human Resources Studies (Continued)

Partner-in-Charge of a comprehensive classification and compensation study of the federally recognized Cherokee Nation. The study included over 500 employees in a review of compensation, classification, and benefit levels.

Partner-in-Charge of a classification and compensation study of approximately 900 positions in approximately 212 classifications for the Daytona Beach Community College. Conducted meetings to discuss major issues and explain the compensation study process to the management team, Human Resources Committee, and other employees.

Project Director on a staffing study of training schools and detention centers for the North Carolina Office of Juvenile Justice. The project involved a review of staffing patterns, an analysis of legal issues impacting necessary staffing levels, and an evaluation of the effectiveness of current systems for staffing. The study also included an evaluation of classification and compensation levels for the over 1,100 positions within the agency. A key component of the analysis was the development of entry level competencies for every staffing level.

Partner-in-Charge of a study to provide guidance and planning for the Florida Division of Rehabilitation and Liquidation in filling position vacancies. Updated employee job specifications, developed job descriptions, reviewed screening and interview criteria, and facilitated the hiring process for a number of vacancies within the division.

Partner-in-Charge of a classification and pay study for the City of Apopka. The study involved an analysis of 330 city employees in 123 classifications.

Partner-in-Charge of a comprehensive classification of jobs for Southern Polytechnic State University. Completed an analysis of each non-instructional job within the University for the purpose of determining specific duties, responsibilities, job requirements, and the need to create new job descriptions. A comprehensive evaluation and analysis of jobs within the University was used to determine the relative worth within the organization and in comparison to like or similar jobs in comparable institutions and private employers in the general region in which the University competes for a labor supply. Also trained the University Human Resources staff in the use, maintenance, and administration of the recommended classification and compensation system and job-based performance evaluation instrument.

Partner-in-Charge of a classification and compensation study for the Columbia County Property Appraiser. The study included a market salary survey, development of a pay and classification plan, the development of class descriptions, and the customization of performance evaluation instruments.

Partner-in-Charge of a comprehensive pay and classification study for the Citrus County Mosquito Control District. Developed, distributed, and analyzed a market salary survey. Also developed a proposed pay plan and performance evaluation tool, a benchmark salary survey, ADA compliant class descriptions, and associated implementation costs.

Partner-in-Charge of a classification and compensation study for the Ounce of Prevention Fund of Florida. The study included completion of a Job Content Questionnaire and the development of a new compensation structure. New job descriptions were also developed based on the new classifications established for the organization.

Human Resources Studies (Continued)

Partner-in-Charge of a project to conduct a classification and compensation study for the Florida Residential Property and Casualty Joint Underwriting Association (JUA). The project involved the analysis of all JUA positions, a survey of the market, and preparation of compensation recommendations for all positions for the statewide agency.

Partner-in-Charge of a study to assist Dougherty County, Georgia in the preparation of a classification and compensation study. Responsibilities included a salary survey, job analysis, preparation of class descriptions, and the development of organizational charts for all County functions with over 650 employees.

Partner-in-Charge on a study for the Baltimore City Community College in standardizing their position descriptions for approximately 163 people assigned to 114 position classes and developed a salary program for administrative and professional employees.

Partner-in-Charge of a comprehensive Statewide Human Resources Strategic Plan for the Executive Branch of Florida Government. Collected best practice data and performed cost benefit analysis in order to produce a five-year plan for the State of Florida. The plan will govern workforce design, compensation, and training for state employees and serve as an implementation guide for preparing the State of Florida workforce for the 21st century. The document by design emphasized linkages between findings, recommendations, benchmarks, and evaluations.

Partner-in-Charge of a comprehensive salary survey for the State of Florida Department of Management Services. Over 100 benchmark positions were included in the survey of over 300 public and private employees across the southeastern United States to capture current salary practice data and to study various pay administration practices of state employees.

Project Director on a compensation and classification study for the Citrus County general government employees and several constitutional officers, including the Property Appraiser, Tax Collector, and the Clerk of the Court. The study included the completion of Job Content Questionnaires, job analysis and the preparation of fiscal implementation plans.

Partner-in-Charge of a project to design a salary study for the Newport News Public Schools in Virginia. Responsible for preparing a pay and classification architecture for all employee groups that included approximately 4,400 employees distributed among an estimated 350 classifications.

Partner-in-Charge for a classification and compensation study of the administrative and supervisory employees of the Dallas Independent School District. The study evaluated 250 professional positions, developed a classification and compensation plan and made recommendations regarding the school classification plan, administrative policies and procedures, merit pay, supplemental pay and stipends.

Partner-in-Charge of a classification and compensation study for the Haywood County Board of Commissioners in North Carolina. Completed an organizational assessment of the County's organizational structure, workflow processes, and staffing patterns.

Human Resources Studies (Continued)

Partner-in-Charge of a salary and benefits analysis for the Wake County Personnel Department in North Carolina. Completed a salary and benefit survey for 85 benchmark classes and was distributed to 50 public and private agencies in North Carolina. Also made recommendations and provided implementation guidelines based on the salary and benefits survey findings. The study required the collaboration of Wake County officials in all stages of the project implementation.

Project Director on a project to conduct a comprehensive job classification, pay review and staffing analysis for the Citrus County, Florida, Board of Commissioners. Evaluated the current classification plan, conducted a market survey, conducted a salary survey, and completed a staffing analysis. Approximately 230 class specifications were developed including the development of recommendations for revisions in the current classification and compensation plan. Provided Citrus County with implementation costs and guidelines for the plan.

Partner-in-Charge on a Classification and Compensation Study for all positions and levels in the Corpus Christi Department of Aviation. Developed a workload and performance measurement for all sections of the organization. Also developed new job descriptions for employees and surveyed local business and other city departments to determine appropriateness of compensation for airport employees. The project was based on analysis of the organization and staffing of the department.

Partner-in-Charge of a comprehensive classification and compensation study of the federally recognized Nez Perce Tribe in Lapwai, Idaho. The study included over 500 employees in a review of compensation, classification, and benefit levels.

Partner-in-Charge of a performance audit and compensation analysis for the City of Cayce, South Carolina. The audit included a review of operations for all departments in the city including a review of all job classifications and salary administration.

Project Director of a classification and compensation study for the Florida School for the Deaf and Blind. Developed a comprehensive classification program for all 385 employees. Collected and reviewed current job data, employee interviews, marketing surveys, a job analysis through a point factor evaluation system and the development of alternative and innovative reward structures.

Partner-in-Charge of an evaluation of all personnel policies supporting the personnel management system for the City of Winter Springs, Florida. All key policies of the City were developed, including those relating to classification, employment, promotions, grievances and leaves of absence.

Partner-in-Charge of a comprehensive salary survey for the State of Florida Department of Management Services. Over 100 benchmark positions were included in the survey of over 300 public and private employees across the southeastern United States to capture current salary and pay practice data. Also studied were various pay administration practices of state employees. The salary survey was a high profile study for the State of Florida, which was presented to the State of Florida Legislature for review.

Project Director of a Comprehensive Workload and Classification Study of office-based positions for Fairfax County Public Schools, the 12th largest school system in the nation in 1998. The primary goal of the evaluation was to identify the appropriate number and type of positions, as well as to identify their proper classification level within the compensation system.

Human Resources Studies (Continued)

Project Director of a Classification and Compensation study for Davidson County, North Carolina. The project involved a comprehensive review of all County positions, a market survey, preparation of class descriptions and development of a pay plan.

Project Director of a Classification and Compensation Study for all positions within the City of Belle Glade. Collected and reviewed current job data, employee interviews, market surveys, job analysis and the evaluation and classification of all municipal positions. Completed a report that stated recommended pay levels for all city positions, resulting in internal and external equity.

Project Director of a redesign of the Compensation and Classification Plan for the City of Richmond, Virginia. Applied broad banding, gainsharing, team-based pay and a range of other non-traditional approaches to public compensation for Richmond's 5,000 employees.

Project Director of a Personnel System Study for Charleston County, South Carolina. Served a major role in the 1991 implementation of a factor-point based classification system for this large county government. Handled a wide variety of critical issues facing the personnel department.

Project Director of a Classification and Compensation Study for Stetson University and Law School.

Project Director of a Classification and Compensation Study for Black Hawk College, Illinois.

Project Director of a Classification and Compensation Study for Broward County, Florida.

Project Director of a Classification and Compensation Study for the Broward County Sheriff's Office.

Project Director of a Classification and Compensation Study for the City of Los Angeles Housing Authority, California.

Project Director of a Classification and Compensation Study for Manatee County, Florida.

Project Director of a Classification and Compensation Study for New Hanover County, North Carolina.

Project Director of a Classification and Compensation Study for Sarasota County, Florida

Project Director of a Classification and Compensation Study for the State of North Carolina (as a WBE to Ernst & Young).

Project Director of a Classification and Compensation Study for Escambia County Utilities Authority, Florida.

Project Director of a Classification and Compensation Study for the Pinellas Sheriff's Office, Florida.

Project Director of a Classification and Compensation Study for the City of Tallahassee, Florida.

Project Director of a Management and Staffing Study for the City of Palm Bay, Florida.

Human Resources Studies (Continued)

Project Director of a Classification and Compensation Study for the City of East Baton Rouge, Louisiana.

Other Consulting Projects

Project Director of a compensation and classification study, which included the design and installation of performance evaluation instruments and software. This study also included a survey of relevant labor markets for the Brownsville area.

Partner-in-Charge of a pay and classification study for the managerial employees for the government of Pinellas County Florida. The study looked at the approximately 225 managerial employees in approximately 150 different classifications. The study looked at current rates of pay and benefits for these employees. The study conducted a salary review by using existing salary data and data obtained from selected employers. A new pay structure was established, and each classification was placed on the new structure according to the county's internal job hierarchy and the internal "worth" of the job as determined by the study.

Project Director of a Vehicle Utilization Audit for the Pinellas County Sheriff's Department. Reviewed the usage of vehicles in the department, focusing on the costs of operating a major vehicle program. Resulted in the reduction of maintenance costs and in the number of vehicles assigned by 20 percent.

Project Director of a Fire and Rescue Protection Study for the City of Lufkin, Texas. Prepared a complete Master Plan review of fire and emergency services for the community of Lufkin, Texas. The Fire Chief had requested an additional 30 personnel to continue to meet the requirements of providing fire and emergency services. Performed an extensive on-site review and analysis and provided alternatives and recommendations to the City that would allow them to close one station, and maintain the same high level of emergency response service, while adding only nine personnel.

Technical Advisor of an Organization and Management Audit for the City of Naples, Florida. Participated in a joint-venture study of all City departments, resulting in the implementation of a broad range of structural and operational adjustments. The process was very interactive and involved all management levels and significant Council input.

Project Director of a Management Audit for the South Florida Regional Water and Wastewater Authority. Directed a management, fiscal, operations, and efficiency review for this regional authority that serves a population of over 250,000 in a rapidly growing coastal region. The Board adopted the study intact.

Project Director of a Fire and Emergency Medical Services Study for the City of Albany, New York.

Vice President for the Human Resources Management Division of David M. Griffith & Associates, Ltd. National Coordinator for the standardization of the Human Resources product line including quality control and service delivery. Developed and implemented various software programs including the Archer Point Factor Matrix Job Evaluation Software, the Archer Job Evaluation Text, Performance Manager and Performance Appraiser Software, the Job Description Writing Manual.

Regional Manager for the Management Improvement Corporation of America. Project Manager on various management, personnel, operational, and local government studies.

PROFESSIONAL ASSOCIATIONS AND ACTIVITIES

American Society for Public Administration (ASPA), Gold Coast Chapter Board of Directors and National Staff Director, 1991–1992
Florida Public Personnel Association, Annual Sponsor and Presenter
Florida City and County Managers Association, Program Presenter
International Personnel Management Association, Annual Sponsor
National Association of State Personnel Executives, Sponsor and Presenter

EDUCATION

Graduate Studies, Public Administration, College of Business and Public Administration, Florida Atlantic University, 1972–1974.

B.A., Public Administration, Florida Atlantic University, 1972

DONALD C. LONG
SENIOR EXECUTIVE VICE PRESIDENT

Dr. Long has over 23 years of experience providing management assistance to elected and appointed officials in the areas of management and organizational reviews, program evaluations, public policy/productivity, strategic planning, human resources, public safety services, and other related management areas. He has provided public sector management and financial consulting assistance to over 200 governmental and nonprofit agencies in a variety of service areas, including management research studies for cities, counties, and public agencies in the area of organization and management, human resource systems, program evaluations and productivity studies, staffing and cost-benefit analysis, and strategic planning.

PROFESSIONAL EXPERIENCE

Ph.D., Public Administration, Florida Atlantic University, 1994

M.P.A., Public Administration, The George Washington University, Washington, D.C., 1976

B.A., Education/Government/Political Science, University of Akron, cum laude, 1973

PROFESSIONAL EXPERIENCE

Management Advisory Group, Inc., Senior Vice-President, 2004 to Present

MGT of America, Inc., Senior Consultant, February 1998–2004.

David M. Griffith and Associates, Ltd., Manager, 1994–1998.

Long Associates, Inc., President and Managing Partner, 1983–1994.

Representative E. Clay Shaw, Member of Congress, Aide, Washington, D.C., and Fort Lauderdale, 1984–1985.

Broward County, Florida, Office of Budget and Management Services, Resource Management Director, 1979–1982.

City of Opa Locka, Florida, Acting City Manager and Assistant City Manager, 1979.

PROFESSIONAL BUSINESS EXPERIENCE

Consulting Studies

Project Director on a study to assess the Construction Services and Permitting Division for the City of St. Petersburg, Florida.

Project Director of a diagnostic review for a management study of Johnston County, North Carolina.

Team Member on a comprehensive management study of the California Commission on Teacher Credentialing's organizational structure and credential processing protocols.

Team Member of a performance audit of the North Carolina Department of Transportation, conducted for the Office of the State Auditor.

Project Manager on an organizational study for Florence County, South Carolina.

Project Manager on an organization and management study for Sumter County, South Carolina.

Team Member on a strategic planning assistance study for the Commonwealth of Puerto Rico. Assisted the government of Puerto Rico in a review of the tax collection and revenue distribution agency.

Project Director on an organizational evaluation in Palm Beach Gardens, Florida. Conducted an evaluation of all City departments regarding efficiency, organization structure, and staffing.

Project Director on a department evaluation for the Town of Highland Beach, Florida. Conducted a review of a department that provides services in the areas of permitting, plans review, code enforcement, and maintenance services.

Project Manager for an efficiency analysis of Hillsborough County Civil Service Board, Florida, as required under Florida statutes. The goals of the study were to ensure adherence to the requirements under the law, and to identify operational and efficiency improvements.

Project Manager of an efficiency analysis for Hillsborough County, Florida. Completed an efficiency study of the Hillsborough County (Tampa) Human Resources/Equal Opportunity Department.

Project Director of an operations and efficiency audit for the City of Palm Bay, Florida. Directed a comprehensive study of all City departments, which resulted in significant operational improvements.

Project Director of staffing and site location analysis for the Martin County Tax Collector. The report recommendations were accepted and implemented by the Florida Department of Revenue.

Consulting Studies (Continued)

Project Director of an incorporation feasibility study in Key Biscayne, Florida. Directed an analysis of the feasibility of the community establishing itself as an incorporated municipality.

Technical Advisor on an incorporation assistance study for the Village of Wellington, Florida. Assisted the municipality in establishing service agreements for critical services.

Project Manager of a tax analysis and revenue planning study for the Village of Wellington, Florida. Assisted the Village in the review of alternative tax strategies, resulting in a significant adjustment to the method of financing the government.

Project Director of a budgetary analysis for Palm Beach County, Florida. At the request of the Palm Beach County Council for Efficient Government, conducted an analysis of the County's proposed annual budget and public expenditures.

Project Director of a Public Safety Department audit for the City of Sikeston, Missouri. Developed a plan for improving and upgrading services.

Project Director of a reorganization for the City of East Providence, Rhode Island. Directed the implementation of a major reorganization of the city. All municipal departments were included in the analysis.

Technical Advisor of an organization and management audit for the City of Naples, Florida. Participated in a joint venture study of all City departments, resulting in the implementation of a broad range of structural and operational adjustments.

Project Director of a management audit for the South Florida Regional Water and Wastewater Authority. Directed a management, fiscal, operations, and efficiency review.

Technical Advisor of an organizational and management audit of Seminole County, Florida. Participated in the joint venture study to review all aspects of the County government organization, management, and structure.

Project Manager of an organizational and management audit for Charlotte County, Florida.

Project Director of a public safety review in Fairport Harbor, Ohio. Recommendations focused on reinforcing the management structure of the departments. A Public Safety Department was established to better coordinate the Police, Fire, and EMS services.

Project Director of an organizational audit for the City of Maitland, Florida. Directed a citywide review of all departments and functions within the city government.

Project Director of an organizational audit for the Town of Lake Park, Florida. Special attention was dedicated to reviewing the distribution of funds among departments to ensure that funding reflected community values.

Consulting Studies (Continued)

Project Director on an organizational evaluation for Delgado Community College in New Orleans, Louisiana. Completed an evaluation of the efficiency and effectiveness of the Human Resources Department.

Project Director on a comprehensive management and performance review of the Cherokee County Board of County Commissioners in Murphy, North Carolina.

Project Director of a Year 2000 Report for Lutheran Churches. Prepared a guiding document on the priorities that required consideration by the nonprofit organizations. The report focused on establishing a long-term set of goals and objectives within budgetary and funding constraints.

Project Director in charge of conducting a management study of all departments and operations for the City of Belle Glade, Florida.

Director on a project that conducted an organizational and operational review of two critical departments within Charleston County, South Carolina, including the Emergency Medical Services and Emergency Preparedness Departments.

Project Director of a consolidation evaluation in Auburn Hills and Rochester Hills, Michigan. Directed an evaluation of the potential for consolidating fire and EMS services for two upscale communities in the Detroit, Michigan, area.

Project Director of a fire consolidation study for the Miami Valley Regional Fire/EMS Study Committee in Dayton, Ohio.

Project Director of a master fire plan for the City of Eau Claire, Wisconsin. Directed an evaluation of the City's fire and emergency medical services.

Project Director of an EMS department analysis for Burke County, North Carolina. Evaluated all EMS service components and completed an analysis that focused on direct service delivery issues.

Project Director of an evaluation of alternative service delivery options for fire and EMS services for the Town of Lauderdale by the Sea, Florida.

Director of a project that conducted the Law Enforcement and Fire Rescue Fiscal Impact Study for the Village of Wellington, located in Florida.

Project Director on an evaluation of the expected community growth patterns for the next 20 years for the City of Tamarac. The data and analysis were used to support long-term recommendations for fire and emergency services provided by the city.

Project Director on an evaluation of the expected community growth patterns for the next 20 years for the Bonita Springs Fire Control and Rescue District. The data and analysis were used to support long-term recommendations for fire and emergency services provided by the Fire District.

Consulting Studies (Continued)

Project Director on a study for Georgetown County, South Carolina, to develop a master plan for Emergency Medical Services and Fire Services for the fast-growing Charleston area County government.

Team Member for the support services team on a performance review of the Lee County Sheriff's Office in Ft. Myers, Florida. Evaluated all aspects of the Sheriff's Office operations and administration.

Project Director for a comprehensive evaluation of the Fire and Emergency Medical Services for the Town of Lauderdale by the Sea in Florida.

Project Director on an Emergency Medical Services Master Plan in Florence, South Carolina. The purpose of the study was to establish a long-term master plan for services, with consideration for staffing, efficiency, service levels, and station locations using a critical path software program.

Project Director for a fire department services study in Jacksonville, North Carolina. Prepared departmental evaluation for the primary city adjacent to Camp LeJeune, North Carolina.

Project Manager of a police, fire, and EMS evaluation for the City of St. Cloud, Florida.

Project Manager for a fire department study for the City of Columbia, South Carolina.

Project Director on a consolidation evaluation in South Haven, Michigan. Directed an analysis of the feasibility of consolidation of the fire and EMS services for several communities in the state of Michigan.

Team Leader for an organizational evaluation for the Durham, North Carolina, Police Department. Participated in productivity and organizational evaluation of major police department, with a focus on staff services, internal affairs, and community policing.

Project Director of an EMS department analysis for Brunswick County, North Carolina.

Project Director of a vehicle utilization audit for the Pinellas County Sheriff's Department, Florida.

Project Director of a staffing and budget analysis for the Flagler County Sheriff's Department, Florida. Directed a review of the required level of staffing in patrol, investigations, detention, and administration.

Project Director of a Fire and Emergency Medical Service Master Plan for the City of Grand Junction, Colorado. Reviewed all areas, including long-term planning, service level indicators, and annexation policies.

Project Director of a fire and emergency medical services study for the Kennedy Space Center, Florida. Managed the project for the Center's emergency services provider, EG&G, in an evaluation of the Fire, EMS, and Astronaut Rescue services.

Consulting Studies (Continued)

Project Director of a Police Department study for the City of Eustis, Florida.

Project Manager of a Fire and Rescue Protection study for the City of Lufkin, Texas. Prepared a complete master plan review of fire and emergency services.

Project Director of a Police Department study for the City of Eastlake, Ohio. Directed an overall review of the City's police staffing, operations, facilities, management, community relations, and communications within the municipal government.

Project Director of a Fire and Rescue Services study for Peters Township, Pennsylvania. One of the critical issues was the independent provision of EMS services by a wholly volunteer organization.

Project Director of a Fire and Emergency Medical Services study of selected positions for the City of Milwaukee, Wisconsin, to establish whether there was substantial equivalency in the work being completed by key management/supervisory positions.

ALAN JOHNSON
EXECUTIVE VICE PRESIDENT,
TECHNOLOGY & DATABASE MANAGEMENT

Over 20 years of experience in consulting, analysis, programming, on-site and classroom training, and on-site and telephone support and marketing of computer applications.

PROFESSIONAL EXPERIENCE

Management Advisory Group, Principal, November, 2001–Present. Tallahassee, Florida.

PAS, Senior Manager, Technical Training and Support, Jan. 2002–present

Senior Analyst, June 2001–December 2001; Analyst, Sept 1999–June 2001, MGT of America, Inc.,

Information Technology Reporting Officer, TD Bank, Toronto, Ontario, 1997–1999.

Instructor, Information Technology Courses, George Brown College, Toronto, 1991–1999.

Contract Instructor, De Vry Institute of Technology, North York, Ontario, 1994–1995.

Instructor, TJS Training Centre, Toronto, Ontario, 1990–1996.

Consultant/Owner Business Solutions, Orlando 1986–1990

Director of Training and Support, Hurricane Systems, Inc. 1984–1986

Manager of Telemarketing Pre-Sale Support, Armor Systems, Inc. Orlando 1983–1984

Business Manager, University of Central Florida Student Health Services, Orlando 1981–1984

PROFESSIONAL BUSINESS EXPERIENCE

- Designer, developer and instructor for **Performance Manager©** performance evaluation software and documentation.
- Designer, developer, instructor and manual developer for **Classification Manager©** job evaluation software.
- Designer, developer, instructor and manual developer for **Market Manager©** market analysis software.
- Consultant for redesign and manual developer for **PCMaster©** job evaluation software.
- Senior Consultant and Director of Technology for a compensation and classification study for the City of Bowling Green, Kentucky
- Senior Consultant and Director of Technology for a compensation and classification study for the City of Sevierville, Tennessee.
- Senior Consultant and Director of Technology for a compensation and classification study for Detroit/Wayne County Airport Authority.

- Director of Technology on a classification and compensation study and organizational review for the City of Dover, Delaware. Conducted a City-wide compensation and classification study and a organizational review for the City of Dover in 2002. This study for Delaware's capital city included three important areas of work: the Classification phase of the study, including the revision of job descriptions, and the Compensation phase of the study, and the Organizational Study. The classification and compensation phases were conducted using **Classification Manager©** and **Market Manager©**.

- Director of Technology on a classification, compensation, performance appraisal, and staffing study for the City of Ponce Inlet. The classification and compensation reviews were conducted using **Classification Manager©** and **Market Manager©**. The performance appraisal system was implemented using **Performance Manager©** performance evaluation software and documentation.

- Consultant on a project for the St. Johns County (FL) Property Appraiser's office. The study included a salary survey and job analysis for all executive staff.

- Consultant on an engagement to implement recommendations for the Benefit Recovery Program for Florida Department of Children and Families.

- Database manager and user interface designer/developer for a project to monitor the compliance of the Florida Department of Children and Families with the *Spencer* agreement to improve its processing of disability determination cases

- Director of a project for Human Resource Software and Methodology Training for Baltimore County Public Schools.

- Consultant, software developer and trainer for customized Performance Management software for Florida Virtual School

- Developer of **Performance Pro©** performance management software

- Director of Technology and Training and Database Manager on a Classification and Compensation Study for:

  - Rockford Public School District, Illinois
  - Huntsville City Schools, Alabama
  - Baltimore City Community College; Maryland
  - Southern Polytechnic State University, Marietta, Georgia
  - Newport News Public Schools
  - Daytona Beach Community College
  - City of Leesburg, Florida
  - Cherokee Nation Enterprises, Oklahoma
  - New Braunfels Utilities, Texas
  - City of Brownsville, Texas
  - City of LaPorte, Texas
  - City of Chesapeake, Virginia
  - Chatham County, North Carolina
  - Bastrop County; Texas
  - Oklahoma City, Oklahoma
  - City of Apopka, Florida

  - Citrus County Mosquito Control District, Florida
  - Dougherty County, Virginia
  - Nez Perce Tribe, Lapwai Idaho

- Team Member on Compensation and Classification Plans for:
  - City of Lakeland, Florida
  - Florida On-Line High School, Tallahassee, Florida
  - Columbia County Property Appraiser, Florida.

- Instructor of on-site and college courses, and course materials developer for

  Systems Analysis and Design
  Microsoft Access
  Microsoft Word
  Microsoft Excel
  Microsoft Visual Basic Programming
  Microsoft VBA Programming
  FoxPro Programming
  Clipper Programming
  DBase Programming
  Lotus 123
  WordPerfect
  AccPac Accounting Software: General Ledger, Accounts Payable, Accounts Receivable, Order Entry, Inventory, Payroll
  Simply Accounting – complete accounting system for small business
  Hurricane Systems Accounting Sofware: General Ledger, General Ledger, Order entry, Point of Sale, Accounts Receivable, Accounts Payable, Inventory Control
  Excalibur I and Excalibur II Accounting Software: General Ledger, Order entry, Point of Sale, Accounts Receivable, Accounts Payable, Inventory Control

  Many other programming, accounting, spreadsheet and word processing software applications.

- Creator and manager of the support and training departments for a developer of multi-user accounting software.

- Designed and ran telemarketing, presale business analysis and support for a major accounting software company.

- Initiated and supported systems analysis and system design services for clients throughout the United States and Canada.

EDUCATION

B.S., Business Administration, Florida International University
Additional university and industry coursework in computer science.

MICHAEL JONES
SENIOR MANAGER

Mr. Jones has over twenty-five years experience in a variety of management positions in both the non-profit and private sectors. Corporate management assignments have included highly responsible human resources financial management positions with Capital Pension Services, Exxon Mobil and the Langley School, among others. As a result of these experiences, Mr. Jones brings considerable expertise in financial management, negotiations, proposal development, information systems, research, organizational analysis and development in the fields of human resource planning and human capital management.
Mr. Jones' work with MAG includes market review and analysis, financial planning, on-site interviewing, job analysis and financial forecasting. Mr. Jones is a fully qualified consultant with the firm.

PROFESSIONAL EXPERIENCE

Management Advisory Group, Inc., Principal, 2005-Present. Montclair, VA.

Capital Pension Services, Inc., Principal, 2002- 2005. Lake Ridge, VA.

Exxon Mobil Corp., Business Analyst, 2001-2002. Fairfax, VA.

The Langley School, Accountant, 1999 -2001. McLean, VA

First Baptist Church of Washington D.C., Business Manager, 1993 – 1999. Washington, D.C.

Martin Brower Company, Accountant, Computer Software Trainer 1991- 1993. Manassas, VA.

Universal Dynamics, Inc., Accounting Manager, 1989 – 1991. Woodbridge, VA.

British Embassy, Accountant, 1981 – 1989. Washington, D.C.

Milk Marketing Board, U.K., Office Manager, 1978-1981. United Kingdom.

PROFESSIONAL BUSINESS EXPERIENCE

Responsible for classroom instruction and coordinating field training operations for Martin-Brower Company during rollout of company wide IBM AS400 and accounting software in Little Rock, AR, Chicago, IL, Manassas, VA and Stockton, CA.

Senior Coordinator for visit of then First Lady Hillary Clinton to First Baptist Church of Washington D.C. for presentation of "Family Health Bill"

EDUCATION

1974 – 1977, Sheffield Hallam University, Sheffield, England
Bachelors of Business Studies.

1969 – 1974, Balshaw's High School, Leyland, England
Oxford 'A' Level Major in Mathematics

CERTIFICATIONS AND TRAINING

1975 – Wigan Technical College, Wigan, England
Institute of Cost & Management Accountants (Part I)

1982 – H&R Block Corporation, Alexandria, VA
Certified Tax Preparer

RITA HAUGABROOK
PROJECT MANAGER

Ms. Haugabrook's experience includes the Human Resources field employee training, benefits design and implementation programs, management development, wage and salary administration, as well as effective presentation skills, superior interpersonal communication skills and in-depth awareness and sensitivity to multicultural issues.

PROFESSIONAL EXPERIENCE

Management Advisory Group, Inc. Project Manager, June 2006-Present. Tallahassee, Florida.

Florida State University. Personnel Representative, June 2005–May 2006; Program Assistant, November 2004-June 2005; Teaching Assistant, August 2001-April 2003. Tallahassee, Florida.

Tallahassee Memorial Regional. Medical Records Specialist, January 2000–August 2000. Tallahassee, Florida.

PROFESSIONAL BUSINESS EXPERIENCE

Chief Administrative Officer of LYNX for Contracts and Procurement, Risk Management and Information Technology Divisions. Led efforts to update compensation pay plan, revise employment policies, implement employee development program. Also established risk management policies and assisted in the revision of Administrative Rules for the company.

Director of Human Resources and Risk Management at Corpus Christi Regional Transportation Authority and led Human Resources staff, responsible for policies and procedures, provided guidance to other staff members, and developed, implemented and revamped compensation and incentive programs for employees.

Senior Human Resource Analyst of The City of Corpus Christi for staffing and recruitment purposes. Supported administrative departments, enhanced benefits programs, revamped insurance policies.

Human Resources Analyst at The City of Corpus Christi that handled police and fire selections, staffing for administrative departments, salary surveys for administrative positions, and EEOC investigations.

CURRENT AND PAST PROFESSIONAL AFFILIATIONS

Teaching, Florida State University (PIE) 2003
Program for Instructional Excellence
Sexual Harassment Policy, Time Management, Multicultural Issues

EDUCATION

Ph.D., candidate Anthropology, Florida State University, 2001-present.

M.S., International Affairs, Florida State University, 2001.

B.A., French, Florida A&M University, 2000.

B.A., Spanish, Florida A&M University, 2000.

SAMPLE CLASS DESCRIPTIONS

CLIENT
POSITION DESCRIPTION

TITLE: ACCOUNTING TECHNICIAN - SENIOR

DATE: NOVEMBER 2010

Purpose of Position

The purpose of this position is to provide accounting support to the Finance Department. Duties and responsibilities include reconciling Client bank accounts, preparing bond audits and audit schedules, managing assigned pensions, providing departmental information, and preparing reports and statistics as directed.

Essential Duties and Responsibilities

The following duties are normal for this position. These are not to be construed as exclusive or all-inclusive. Other duties may be required and assigned.

- Reconciles assigned Client bank accounts.
- Provides information and responds to inquiries pertaining to departmental activities, policies, and procedures.
- Manages Police and Firefighter Pension Fund annuity and investment reporting in compliance with departmental guidelines and regulations.
- Prepares and prints annual bond audit.
- Drafts schedules and account analyses for independent auditors as required.
- Performs routine clerical tasks such as preparing correspondence, and gathering and maintaining data/information to support routine and periodic reports for the assigned area.
- Attends departmental conferences and meetings as required.

Additional Job Functions

- Assists with answering departmental telephones.
- Performs other related duties as required.

Minimum Training and Experience Required to Perform Essential Job Functions

Associate's degree or the equivalent of two years of college or vocational school education in accounting, with one to two years of accounting/banking experience; or any equivalent combination of education, training, and experience which provides the required knowledge, skills, and abilities for this position.

Physical and Mental Abilities Required to Perform Essential Job Functions

Language Ability and Interpersonal Communication

● Ability to analyze data and information using established criteria, in order to define consequences and to consider and select alternatives. Ability to compare, count, differentiate, measure, and/or sort data and information. Ability to assemble, copy, record and transcribe data. Ability to classify, compute, tabulate, and categorize data.

● Ability to advise and interpret on how to apply policies, procedures and standards to specific situations. Ability to explain, demonstrate and clarify to others within well-established policies, procedures and standards.

● Ability to utilize advisory data and information such as financial statements, technical operation manuals, procedures, guidelines, non-routine correspondence and laws.

Mathematical Ability

● Ability to calculate percentages, fractions and decimals; ability to calculate volume, ratios, present values, spatial relationships; and ability to interpret basic descriptive statistical reports.

Judgement and Situational Reasoning Ability

● Ability to apply situational reasoning ability by exercising judgment, decisiveness and creativity in situations involving the evaluation of information against measurable criteria.

● Ability to use functional reasoning development in performing activities within rational systems involving diversified work requiring exercise of judgement.

Physical Requirements

● Ability to operate equipment and machinery requiring complex and rapid adjustments. Ability to handle, load and unload, and move and guide material using simple tools.

● Ability to coordinate eyes, hands, feet and limbs in performing skilled movements such as rapid keyboard use.

● Ability to exert light physical effort in sedentary to light work, involving lifting, carrying, pushing and pulling. Ability to handle, finger, and feel.

● Ability to recognize and identify similarities or differences between characteristics of colors, forms, sounds, tastes, odors, textures, etc., associated with objects, materials and ingredients.

Environmental Adaptability

● Ability, in regard to environmental factors such as temperature variations, odors, toxic agents, violence, noise, vibrations, wetness, disease and/or dust, to work under very safe and comfortable conditions.

AMERICANS WITH DISABILITIES ACT COMPLIANCE

The (Client) is an Equal Opportunity Employer. ADA requires the (Client) to provide adequate accommodations to qualified persons with disabilities. Prospective and current employees are encouraged to discuss ADA accommodations with management.

CLIENT
POSITION DESCRIPTION

TITLE: CHIEF FINANCIAL OFFICER

DATE: NOVEMBER 2010

Purpose of Position

The purpose of this position is to oversee the collection and disbursement of Client funds, establish and direct the Client's financial policies, and direct the Client's Alcohol Beverage Control Program. Duties and responsibilities include supervising and directing departmental staff; collecting, analyzing, and reporting financial information to Client officials in order to make policy and operating decisions; directing accounting systems and the distribution of Client funds within various operating departments, exercising professional judgment; participating in developing incentives for economic development; directing the Alcohol Beverage Control Program; and performing administrative tasks such as preparing financial reports, making presentations, and performing short and long term planning for the Finance Department.

Essential Duties and Responsibilities

The following duties are normal for this position. These are not to be construed as exclusive or all-inclusive. Other duties may be required and assigned.

- Supervises, directs, and evaluates assigned staff, handling employee concerns and problems, directing work, counseling, disciplining, and completing employee performance appraisals; develops and monitors departmental policies and procedures.

- Directs the financial affairs of the Client while establishing major economic objectives and financial policies for Client government; prepares reports and financial analyses outlining Client's financial position in areas of income, expenses, and investments.

- Directs preparation of departmental budget and financial forecasts for all Client funds; oversees disbursement of Client funds within various operating departments.

- Controls collection of municipal taxes, establishment and maintenance of billing and collection procedures, investment of Client funds, and supervision of Occupational License Division.

- Manages the preparation of periodic reports of expenditures and receipts for fiscal year; administers internal auditing procedures.

- Governs disbursement of monetary resources to other agencies partially funded by the Client.

- Administers Client's Alcohol Beverage Control Program while approving license applications, developing policy codes, and enforcing applicable state laws; helps coordinate ABC enforcement and training of police officers.

- Oversees and participates in inspections of business establishments for compliance with ABC Program laws and regulations; conducts administrative hearings pertaining to violations, and orders fines and license suspensions.

- Serves as Treasurer of the Employee Pension Fund.

Additional Job Functions

- Performs special research projects and other related duties relative to the expenditure of Client funds as directed by Client Manager.
- Acts as Client Manager in temporary absence of same.
- Performs other related duties as required.

Minimum Training and Experience Required to Perform Essential Job Functions

Bachelor's degree in Accounting or Finance required (Master's degree in Accounting, Finance, Business Administration or Public Administration and/or CPA preferred), with six to nine years of executive level progressive management experience in finance, preferably in local government accounting (or related); or any equivalent combination of education, training, and experience which provides the requisite knowledge, skills, and abilities for this position.

Physical and Mental Abilities Required to Perform Essential Job Functions

Language Ability and Interpersonal Communication

- Ability to decide the time, place and sequence of operations with a system or organizational framework, as well as the ability to oversee their execution. Ability to analyze and categorize data and information using established criteria, in order to define consequences and to consider and select alternatives.
- Ability to manage and direct a group of workers. Ability to counsel and mediate. Ability to persuade, convince, and train others. Ability to advise and interpret on how to apply policies, procedures and standards to specific situations.
- Ability to utilize design data and information such as high tech manuals, computer languages, accounting methods, and educational curricula.

Mathematical Ability

- Ability to apply algebraic and trigonometric formulas, ability to interpret inferential statistical reports and ability to interpret formulation and equation data.

Judgment and Situational Reasoning Ability

- Ability to apply situational reasoning ability by exercising judgment, decisiveness and creativity in situations involving the direction, control and planning of an entire program or set of programs.
- Ability to use functional reasoning development in performing synthesis functions.

Physical Requirements

- Ability to operate equipment and machinery requiring complex and rapid adjustments. Ability to handle, load and unload, and move and guide material using simple tools.
- Ability to coordinate eyes, hands, feet and limbs in performing skilled movements such as rapid keyboard use.

- Ability to exert light physical effort in sedentary to light work, involving lifting, carrying, pushing and pulling. Ability to handle, finger and feel.

- Ability to recognize and identify similarities or differences between characteristics of colors, forms, sounds, tastes, odors, textures, etc., associated with objects, materials and ingredients.

Environmental Adaptability

- Ability, in regard to environmental factors such as temperature variations, odors, toxic agents, violence, noise, vibrations, wetness, disease and/or dust, to work under very safe and comfortable conditions.

AMERICANS WITH DISABILITIES ACT COMPLIANCE

The Client of Bowling Green is an Equal Opportunity Employer. ADA requires the Client to provide adequate accommodations to qualified persons with disabilities. Prospective and current employees are encouraged to discuss ADA accommodations with management.

CLIENT
POSITION DESCRIPTION

TITLE: CREW SUPERVISOR I

DATE: NOVEMBER 2010

Purpose of Position

The purpose of this position is to lead work crews in the performance of assigned projects or tasks. Duties and responsibilities involve supervising assigned personnel, completing projects/tasks of responsibility, maintaining equipment, providing customer service, and completing related paperwork and reports.

Essential Duties and Responsibilities

The following duties are normal for this position. These are not to be construed as exclusive or all-inclusive. Other duties may be required and assigned.

- Supervises, directs, and evaluates assigned staff in compliance with departmental safety regulations, handling employee concerns and problems, directing work, counseling, disciplining and completing employee performance appraisals.

- Plans and schedules work assignments and determines resources required to complete projects/tasks, such as number of workers, materials, or equipment required.

- Oversees completion of work assignments in accordance with departmental standards; assists with assignments as required.

- Ensures optimal performance of equipment and tools of responsibility, such as tractors, dump trucks, mowers, or backhoes; schedules and/or performs periodic maintenance and repair of equipment.

- Performs periodic inspections of area of responsibility to ensure compliance of equipment and/or facilities with Client standards and regulations.

- Maintains work orders, records, time sheets, and other work-related information for area of responsibility; prepares routine reports as required.

- Attends staff meetings to exchange information; attends professional or technical classes or seminars to improve professional skills.

Additional Job Functions

- Interacts with the general public and other Client departments to provide information, answer questions, and address complaints relating to projects/tasks of responsibility.

- Performs other related duties as required.

Minimum Training and Experience Required to Perform Essential Job Functions

Associate's degree or the equivalent of two years of college or vocational school education in the area of expertise, with three to five years' of experience in the assigned area. Requires valid Kentucky Driver's License and may require specific certification for the area of specialization.

Physical and Mental Abilities Required to Perform Essential Job Functions

Language Ability and Interpersonal Communication

● Ability to classify, compute and tabulate data and information, following a prescribed plan requiring the exercise of some judgment. Ability to compare, count, differentiate, measure, and/or sort data and information. Ability to assemble, copy, record and transcribe data and information.

● Ability to advise on and interpret how to apply policies, procedures and standards to specific situations. Ability to explain, demonstrate and clarify to others within well-established policies, procedures and standards.

● Ability to utilize design data and information such as technical manuals, procedures, and guidelines.

Mathematical Ability

● Ability to add, subtract, measure, multiply, divide, and calculate percentages, fractions, and decimals.

Judgment and Situational Reasoning Ability

● Ability to apply situational reasoning ability by exercising judgment, decisiveness and creativity in situations involving the evaluation of information against measurable criteria.

● Ability to use functional reasoning development in performing activities within rational systems involving diversified work requiring exercise of judgment.

Physical Requirements

● Ability to operate equipment and machinery requiring complex and rapid adjustments. Ability to handle, load and unload, and move and guide material using simple tools.

● Ability to coordinate eyes, hands, feet and limbs in performing semi-skilled movements such as data entry or equipment operation or repair.

● Ability to exert mildly heavy physical effort in moderate to heavy work, including lifting, carrying, pushing, and pulling. Ability to handle, finger, and feel. Ability to stoop, kneel, crouch, and crawl. Ability to climb and balance.

● Ability to recognize and identify similarities or differences between characteristics of colors, forms, sounds, tastes, odors, textures etc. associated with objects, materials and ingredients.

Environmental Adaptability

- Ability, in regard to environmental factors such as temperature variations, odors, toxic agents, violence, noise, vibrations, wetness, disease and/or dust, to work under mildly unsafe and uncomfortable conditions.

AMERICANS WITH DISABILITIES ACT COMPLIANCE

The (Client) is an Equal Opportunity Employer. ADA requires the (Client) to provide adequate accommodations to qualified persons with disabilities. Prospective and current employees are encouraged to discuss ADA accommodations with management.

SAMPLE STANDARD AGREEMENT

AGREEMENT TO PROVIDE PROFESSIONAL

COMPENSATION SERVICES

TO

CLIENT

THIS AGREEMENT, entered into this ____ day of _____ and effective immediately by and between **Management Advisory Group, Inc**. (hereinafter called the "Consultant") and the **CLIENT** (hereinafter called the "Client" and/or "_____"), **WITNESSETH THAT:**

WHEREAS, the Client is interested in obtaining professional human resource management consulting services to assist in developing plans and programs that conform to Federal, State, and local requirements and that will be approved by their representatives;

WHEREAS, the Consultant is staffed with personnel knowledgeable and experienced in the development of human resource management systems and

NOW THEREFORE, the parties hereto mutually agree as follows:

1. Employment of Consultant. The Client agrees to engage the Consultant and the Consultant hereby agrees to perform the services described in the "Scope of Services" listed below.

2. Scope of Services. The Consultant shall do, perform and carry out in a good and professional manner human resource management consulting services as may be requested by the Client, as noted in Consultant's proposal dated _____, which details the proposed study timeline, work plan, and deliverables. The proposed study would include ***approximately ___ employees with ___ classifications.***

3. Time of Performance. The services to be performed hereunder by the Consultant shall be undertaken and completed in such sequence so as to ensure their expeditious completion and best carry out the purposes of the agreement. Projects will commence within ten (10) days of notification to proceed and will be completed within a time period agreed to by the Consultant and the Client.

4. Compensation. The Client agrees to pay the Consultant a sum as designated in item 5 below, or, for services not included in the **Scope of Services**, at a rate of one hundred-fifty dollars ($150.00) per professional hour expended and thirty-five dollars ($35.00) per clerical hour expended, plus expenses. Any on-site requirements shall include directly related travel expenses and professional time.

5. Method of Payment. The Consultant shall submit invoices on a regular basis, indicating work performed. The Consultant shall be paid as soon as the Client can reasonably process such payment. Total cost of the proposed services is $_____.

6. Changes. The Client may, from time to time, require changes in the scope of services of the Consultant to be performed hereunder. Such changes, which are mutually agreed upon by and between the Client and the Consultant, shall be incorporated in written amendment to this agreement.

7. Services and Materials to be Furnished by the Client. The Client shall furnish the Consultant with all available necessary information pertinent to the execution of this agreement. The Client shall cooperate with the Consultant in scheduling and carrying out the work herein.

8. Rights to Terminate Contract. The terms of this contract shall be in effect through _____. Either party shall have the right to terminate this agreement with or without cause, by giving written notice to the other party of such termination at least five (5) days before the effective date of such termination.

9. Indemnification. Consultant agrees, to the fullest extent permitted by law, to indemnify and hold harmless Client for any amounts (including reasonable attorney's fees) for which the Client shall become legally obligated to pay as damages for negligent acts, errors and/or omissions of the Consultant arising out of the Consultant's performance under this Agreement; however, the amount Consultant will pay for damages is limited to $1,000,000, which number is intended to reflect the limits set forth in Consultant's liability insurance.

10. Copyright, Trade Secrets and Security. The Client acknowledges that certain report formats to be provided by the Consultant are copyrighted. The Consultant shall ensure that all copies of its report bear the copyright legend. The Client agrees that all ownership rights and copyrights thereto lie with the Consultant. The Client may use the report solely for and on behalf of the Client's operations. The Client agrees that it will take appropriate action by instruction, agreement or otherwise with its employees to satisfy its obligations with respect to use, copying, protection and security of report formats. Consultant further represents that the copyrighted report formats constitute trade secrets of Consultant as the term "trade secrets" is defined in the appropriate Sections of the State Statutes. Consultant claims exemption from disclosure of the copyrighted materials as is provided under appropriate sections of the State's Public Records Act and Federal copyright laws.

11. Information and Reports. The Consultant shall, at such time and in such form as the Client may require, furnish such periodic reports concerning the status of the project as may be requested by the Client. The Consultant shall furnish the Client, upon request, with copies of all documents and other materials prepared or developed in relation with or as a part of the project.

12. Records and Inspections. The Consultant shall maintain full and accurate records with respect to all matters covered under this agreement. The Client shall have free access at all proper times to such records and the right to examine and audit the same and to make transcripts therefrom, and to inspect all program data, documents, proceedings and activities.

13. Accomplishment of Project. The Consultant shall commence, carry on, and complete requested projects with all practicable dispatch, in a sound economical and efficient manner, in accordance with the provisions thereof and all applicable laws. In accomplishing requested projects, the Consultant shall take such steps as are appropriate to ensure that the work involved is properly coordinated with related work being carried on within the applicable work area.

14. Provisions Concerning Certain Waivers. Subject to applicable law, any right or remedy which the Client may have under this contract may be waived in writing by the Client by means of a formal waiver, if, in the judgment of the Client, this contract, as so modified, will still conform to the terms and requirements of pertinent laws.

15. Matters to be Disregarded. The titles of the several sections, subsections, and paragraphs set forth in this contract are inserted for convenience of reference only and shall be disregarded in construing or interpreting any of the provisions of this contract.

16. Completeness of Contract. This contract and any additional or supplementary document or documents incorporated herein by specific reference contain all of the terms and conditions agreed upon by the parties hereto, and no other agreements, oral or otherwise, regarding the subject matter of this contract or any part thereof shall have any validity or bind any of the parties hereto.

17. The Client not Obligated to Third Parties. The Client shall not be obligated or liable hereunder to any party other than the Consultant.

18. When Rights and Remedies Not Waived. In no event shall the making by the Client of any payment to the Consultant constitute or be construed as a waiver by the Client of any breach of covenant, of any default which may then exist, on the part of the Consultant, and the making of any such payment by the Client while any such breach or default exists shall in no wise impair or prejudice any right or remedy available to the Client in respect to such breach or default.

19. Personnel. The Consultant represents that he has, or will secure at his own expense, all personnel

required in performing the services under this agreement. Such personnel shall not be employees of or have any contractual relationship with the Client. All of the personnel engaged in the work shall be fully qualified to perform such services.

20. Consultant Certification. The Consultant certifies that the Consultant has not been convicted of bribery or attempting to bribe and officer or employee of the Client nor has the Consultant made an admission of guilt of such conduct which is a matter of record.

21. Notices. Any notices, bills, invoices, or reports required by this agreement shall be sufficient if sent by the parties hereto in the United States mail, postage paid, to the addresses noted below.

Management Advisory Group, Inc.
Boulevard Centre
4207 Dale Blvd.
Woodbridge, Virginia 22193
(703) 590-7250

IN WITNESS WHEREOF, the Client and the Consultant have executed this agreement as of the date first written above.

CLIENT

By: _____

print name _____

title _____

Management Advisory Group, Inc.

By:



Carolyn Long
President & CEO
Management Advisory Group, Inc.
4207 Dale Blvd.
Woodbridge, Virginia 22193

MINORITY BUSINESS ENTERPRISE CERTIFICATION

Florida Statewide & Inter-Local Certification



Florida Department of Management Services

Office of Supplier Diversity

Management Advisory Group, Inc

is certified as a Minority Business Enterprise

under the provisions of Chapter 287, Florida Statutes and Inter-Local Agreement,

for a one year period from February 26, 2007 to February 26, 2008.

Director

City of Dover

REQUEST FOR PROPOSAL SOLICITATION NOTICE

RFP Number: 08-0042HR RFP Opening: October 25, 2007, 2:00 p.m.

Description: PFP Evaluation System

If you are interested in the request for proposal described above, you can download it in Adobe PDF format from our web site http://www.cityofdover.com. Any amendments of other additional information related to this solicitation will be posted with the original document on the web site.

If you do not have internet access and want to receive this request for proposal, all subsequent amendments, or additional information on the bid package, please provide the requested information to:

The City of Dover
Central Services Department
710 William Street
Dover, DE 19904
Fax: (302) 736-7178, attention Peter Gregg
Phone: (302) 736-7795
e-mail: pgregg@dover de us

Please complete the following and return this form to Central Services:

			Vendor Response /Request
Company:	Management Advisory Group		
Address	4207 Dale Blvd.		No bid at this time, please retain on bid list
	Woodbridge, VA 22193		Please send complete RFP package
Contact:	Donald C. Long	X	I will download the RFP package
Phone	703-590-7250	X	I intend to bid
Fax	703-590-0366		I do not intend to bid
e-mail for ITB/RFP	don@maginc.org		Other:

Addendum Receipt Record

We have received and reviewed the following Addenda (if applicable):

1. N/A, dated _____.
2. _____, dated _____.
3. _____, dated _____.

FIRM NAME: Management Advisory Group

BY: Donald C. Long

PRINTED: _____

TITLE: Executive Vice President

DATED: 10/24/2007

ADDRESS: 4207 Dale Blvd.

Woodbridge, VA 22193

PHONE: 703-590-7250

FAX: 703-590-0366

FEDERAL ID#: 88-0495510

REFERENCE FORM

PFP Evaluation System

CITY OF DOVER

1. COMPANY NAME: SEE PROPOSAL 1-7/1-9

   ADDRESS: _____

   _____

   CONTACT PERSON: _____

   TELEPHONE #: _____

   FAX#: _____

   EMAIL _____

   WEB ADDRESS _____

2. COMPANY NAME: _____

   ADDRESS: _____

   _____

   CONTACT PERSON: _____

   TELEPHONE #: _____

   FAX#: _____

   EMAIL _____

   WEB ADDRESS _____

3. COMPANY NAME: _____

   ADDRESS: _____

   _____

   CONTACT PERSON: _____

   TELEPHONE #: _____

   FAX#: _____

   EMAIL _____

   WEB ADDRESS _____

4. COMPANY NAME: _____

   ADDRESS: _____

   _____

   CONTACT PERSON: _____

   TELEPHONE #: _____

   FAX#: _____

   EMAIL _____

   WEB ADDRESS _____

Memorandum

Office of the Senior City Administrator
P.O. Box 475
Dover, DE 19903
Phone: (302) 736-7163
FAX: (302) 736-7002
E-mail: ttieman@dover.de.us

To: **Legislative, Finance and Administration Committee**

From: **Teresa Tieman**
Senior City Administrator

Date: **January 28, 2008**

Subject: **Fiscal 2009 Revenue Forecasting Model Projections**

It is a pleasure to present you with the Fiscal 2009 Revenue Forecasting Model Projections. The Revenue Forecasting Model sheets are attached for your review. Also attached is a comparison of the forecast model projections to the latest projections of Department Heads and the Finance Director (Expert Forecast).

The Fiscal 2009 Forecasting Model Projections are performed using regression analysis and trend forecasting. For most projections, regression equations have been estimated using ten years of available data. The number of years is less where data are not available.

Forecasting should be used in conjunction with expert opinions when developing revenue projections for budgets. The forecasting model uses several variables including; Kent County Population, US Housing Starts, US Gross Domestic Product, Kent County Civilian Labor Force, US Unemployment and Construction Values for Dover. Data for these variables is obtained from the Delaware Population Consortium and the Livingston Survey used by the Philadelphia Federal Reserve.

The forecasting file consists of twenty-five spreadsheets. The first spreadsheet includes key variables used to forecast revenues. The second spreadsheet computes the forecasts for construction values from three different equations and requires a manual entry for the actual prediction. Construction is the key variable to many of the forecast projections. The next twenty-two sheets compute forecast values for twenty-two revenue items including one for total General Fund revenue (The general revenue forecast is a separate forecast, not the sum of the twenty other forecasts. Thus, the general revenue forecast may be different from the forecast obtained by adding the forecasts of the component revenue sources.)

For eight revenue categories, the previous fiscal year revenue is required. For FY 2009 the latest FY 2008 revenue estimate is used. The eight revenue categories are:

- Business Licenses
- Rental Dwelling Permits
- Trash Revenue
- Property Taxes
- Water Fees
- Sewer Fees
- Fuel/Waste-Water Adjust
- General Fund Total Revenue

For several other revenue categories, there was no statistical basis to choose among two or more estimating equations. In these cases two or more estimates appear on the respective forecast sheet. Over time one estimate may prove to be superior to the other(s). The items with two or more forecasts are:

- Recreation Revenue
- Rental Dwelling Permits
- Trash Revenue
- Trash Fee Rebate
- Property Taxes
- Penalties – Taxes
- Chancery Court Fees
- Water Fees
- Sewer Fees
- Fuel/Waste-Water Adjust

If you have any questions regarding this information, please feel free to contact me.

Attachments

TAT/hf

Important Variables:

Fiscal Year:	2009	
		Year to Use
Kent County Population (2 Yrs ago):	150,516	2007
Kent County Population (Last Year):	152,896	2008
Kent County Population (This Year):	155,138	2009
US Housing Starts:	1,313	2009
US GDP (Billions of Dollars):	15,175.30	2009
Kent County Civilian Labor Force:	76,784.00	2009
US Unemployment Rate:	4.9	2009
Previous Year's Construction Values:	85,000,000	2008

Trend for Trash Fee Rebate:	8	
All Other Trends:	12	
Dover Construction Values Prediction: (from next sheet)	85,000,000	2009
Change in Kent Population:	2,242	2009
Change in Kent Pop Last Year:	2,380	2008
Delaware Personal Income:	151,419	2009
Dover Employment:	17,804	2009
Dover Unemployment:	483	2009

Equations Used:

PINC_DE = 9.977983469*USGDP

EMPDOVER = 0.2427109343*CLFKENT - 169.9573527*USUNEMPRATE

UNEMPDOVER = -
0.004577414177*PINC_DE +
103.4566404*USUNEMPRATE +
0.008719727908*CLFKENT

Construction:

Equation Forecasts:

a.	**71,309,914**
b.	**53,010,278**
c.	**95,400,964**
Average of Equation Forecasts:	**73,240,385**
Actual Prediction:	**85,000,000**

Variables Used:

Kent Pop:	155,138
US Housing Starts:	1,313
Dover Unemployment:	483
Change in Kent County Pop:	2,242
Trend:	12

Equations Used:

a. CONSTRUC_VALUES =
355.5450078*KENT_POP +
45400.5433*USHOUSING_STARTS -
89910.20544*UNEMPDOVER +
42946717.47*D01 -
27558849.8*D_UNDER_05

b. CONSTRUC_VALUES =
32333.28525*USHOUSING_STARTS +
4708.596909*D(KENT_POP) -
20761436.33*D_UNDER_05 +
45516044.16*D01

c. CONSTRUC_VALUES = 50507731.27 + 3741102.722*@TREND + 41024215.84*D01 - 11334394.05*D_

Sewer Fees

Forecast:

a.	**$**	**2,989,649**
b.	**$**	**2,583,285**

Variables Needed:

Previous Year's Sewer Fees:	2,508,600

Variables Used:

Dover Construction Values:	85,000,000.00
Trend	12

Equations Used:

a. SEWER_FEES = 1884275.998 + 92114.3983*@TREND

b. SEWER_FEES = 1.009706875*SEWER_FEES(-1) + 0.0005921652268*CONSTRUC_VALUES

Water Fees

Forecast:

a.	**$**	**4,410,581**
b.	**$**	**4,411,461**

Variables Needed:

Previous Year's Water Fees:	4,371,900

Variables Used:

Construction	85,000,000.00
Trend	12

Change in Water Fees: 39,561

Equations Used:

a. WATER_FEES = 2931166.157 + 40389.16*@TREND + 574394.9267*D03 + 420349.8967*D06

b. D(WATER_FEES) =
0.0004654267092*CONSTRU
C_VALUES +
0.1996901485*D2003*WATE
R_FEES(-1) +
0.1201311865*D06*WATER_
FEES(-1)

Realty Transfer Taxes:

Forecast: **$ 1,627,609**

Variables Used:

Construction Values:	85,000,000
Previous Year's Change in Kent Population:	2,380

Equation Used:

REALTY_TRANS = 0.003887182251*CONSTRUC_VALUES + 545.048135*D(KENT_POP(-1))

Property Taxes:

Forecast:

a.	**$ 9,887,504**
b.	**$ 9,787,374**
c.	**$ 9,790,519**

Variables Needed:

Previous Year's Property Tax:	9,641,259

Variables Used:

Construction Values:	85,000,000
Previous Year's Construction Values:	85,000,000

Change in Property Tax:

a.	246,245
b.	146,115
c.	149,260

Equations Used: (Change in Prop Tax)

96

b. D(PROP_TAX) =
0.001719049003*CONSTRUC_VALUES
+ 0.1240535116*D03*PROP_TAX(-1) +
0.1442851078*D06*PROP_TAX(-1)

c. D(PROP_TAX) =
0.00175637625*CONSTRUC_VALUES(-
1) + 0.1266037121*D03*PROP_TAX(-1)
+ 0.1494077685*D06*PROP_TAX(-1)

PD Fines:

Forecast: **$ 307,217**

Variables Used:

Kent Population:	155,138
Dover Unemployment:	483

Equation Used:

PD_FINES = 3.186059305*KENT_POP - 386.9978006*UNEMPDOVER

JP Court Fines:

Forecast: **$ 244,759**

Variables Used:

Kent Population:	155,138
Dover Unemployment:	483

Equation Used:

JP_COURT_FINES = 1.167047822*KENT_POP + 131.7952004*UNEMPDOVER

Common Pleas Fines:

Forecast: **$ 155,443**

Variables Used:

Kent Population:	155,138
Dover Unemployment:	483

Equation Used:

COMM_PLEAS_FINES = 1.458801402*KENT_POP - 146.6219625*UNEMPDOVER

Penalties- Taxes:

Forecast:

a.	**$**	**72,847**
b.	**$**	**75,317**

Variables Used:

Delaware Personal Income:	151,419
Dover Unemployment:	483
Dover Construction Values:	85,000,000

Equations Used:

a. PENALTIES_TAX = 0.3585283544*PINC_DE + 5.335351309*UNEMPDOVER + 0.0001877571097*CONSTRUC_VALUES - 0.0002845106049*D_UNDER_05*CONSTRUC_VALUES

b. PENALTIES_TAX = 0.3963606068*PINC_DE + 0.0001799863119*CONSTRUC_VALUES - 0.0003034732051*D_UNDER_05*CONSTRUC_VALUES

Police Extra Duty:

Forecast: $ 319,687

Variables Used:

Dover Unemployment:	483
Kent Population:	155,138
Delaware Personal Income:	151,419
Trend:	12

Equations Used:

POLICE_EXTRA_DUTY = -119.7434178*UNEMPDOVER + 0.104654286*KENT_POP + 2.386301185*PINC_DE + 170927.2146*D01TO03

Chancery Court Fees:

Forecast:

a.	**$**	**751,634**
b.	**$**	**1,028,769**
c.	**$**	**757,345**
d.	**$**	**1,063,920**

Variables Used:

Delaware Personal Income:	151,419
Kent Population:	155,138
US GDP:	15,175
Trend:	12

Equations Used:

a. CHANCERY_FEES = 4.963935407*PINC_DE
b. CHANCERY_FEES = 22.53647125*PINC_DE - 15.3648858*KENT_POP
c. CHANCERY_FEES = 49.90643494*USGDP
d. CHANCERY_FEES = -269520 + 111120*@TREND

Book Reimbursement:

Forecast: $ 334,404

Variables Used:
Kent Population: 155,138

Equation Used:
BOOK_REIMB = 1.393779152*KENT_POP + 0.7617456638*KENT_POP*D1998 + 0.504370224*KENT_POP*D1998*D2006

Trash Revenue:

Forecast:

a.	**$**	**1,262,075**
b.	**$**	**1,168,052**

Variables Needed:

Previous Year's Trash Revenue:	1,191,411

Variables Used:

Construction Values:	85,000,000
Trend	12

Change in Trash Revenue: 70,664

Equation Used: (Change in Revenue)

a. D(TRASH_REVENUE) =
0.000831336216*CONSTRUC_VALU
ES +
2.452125123*D_2001_INC*TRASH_
REVENUE(-1)

b. TRASH_REVENUE = 41405.31083 + 46425.97111*@TREND + 569534.7253*D2001ANDAFTER

Trash Fee Rebate:

Forecast:

a.	**$**	**217,697**
	$	**208,224**
b.	**$**	**142,259**

Variables Used:

Previous Year Construction Values:	85,000,000
Forecast (a) for Trash Rev This Year:	1,262,074.58
Forecast (b) for Trash Rev This Year:	1168051.689

Equations Used:

a. TRASH_FEE_REBATE =
0.001065016912*CONSTRUC_VALUE
S(-1) +
0.1007641549*TRASH_REVENUE

b. TRASH_FEE_REBATE = 195090.339 - 6603.916286*TREND

Rental Dwelling Permits (Inspection Fee):

Forecast:

a.	**$**	**294,173**
b.	**$**	**312,663**

Variables Needed:

Previous Year's Inspection Fee:	295,000

Other Variables Used:

Previous Year's Construction Values:	85,000,000
Trend:	12

Equations Used:

a. RENT_INSP_FEE =
0.3252664469*RENT_INSP_FEE(-1) +
0.002331614878*CONSTRUC_VALUE
S(-1) +
0.0002365761847*CONSTRUC_VALU
ES(-1)*D_UNDER_05
b. RENT_INSP_FEE = 170198.4884 + 11872.00743*@TREND

Library Fines:

Forecast: $ 36,658

Variables Used:
Kent Population: 155,138.00

Equation Used:
FINES_REC = 0.2362922634*KENT_POP - 26424.1675*D99

Plumbing and HVAC

Forecast: $ 78,285

Variables Used:
Construction Values: 85,000,000.00

Equation Used:

PLUMB_HVAC =
0.000921251994*CO
NSTRUC_VALUES +
0.0006137289897*CO
NSTRUC_VALUES*D
_UNDER_05

Recreation Revenue:

Forecast:

a.	**$**	**119,000**
b.	**$**	**106,458**

Variables Used:

Delaware Personal Income:	151,419
Dover Employment:	17,804
Kent Population:	155,138

Equations Used:

a. REC_REVENUE = 0.5116696698*PINC_DE + 2.332326054*EMPDOVER

b. REC_REVENUE = 0.6862164381*KENT_POP

Impact Fee:

Forecast: **$ 849,745**

Variables Used:
Construction Values- Previous Fiscal Year: 85,000,000

Equation Used:
IMPACT_FEE =
0.009996850321*CONSTRUC_VALUES(-1)
+
0.005293997312*D_UNDER_05*CONSTRU
C_VALUES(-1)

Franchise Fees:

Forecast: $ 376,040

Variables Used:
Construction Values: 85,000,000.00

Equation Used:
FRANCHISE_FEES = 0.004423606806*CONSTRUC_VALUES

Business Licenses:

Forecast: **$ 1,451,514**

Variables Needed:
Previous Year's Business Licenses: 1,410,000.00

Other Variables Used:
Construction Values: 85,000,000.00

Equation Used:

BUS_LICENSES =
0.9663858704*BUS_LICENSES(-1) +
0.001046244651*CONSTRUC_VALU
ES +
0.0007918606757*D_UNDER_05*CO
NSTRUC_VALUES

Building Permits:

Forecast: $ 599,420

Variables Used:
Construction Values: 85,000,000.00

Equation Used:

BUILD_PERMITS =
0.006040382563*CONSTRUC_VALUES
+
0.0004051900263*CONSTRUC_VALUES
*D_UNDER_05 +
0.001011669087*CONSTRUC_VALUES*
DUMMY_05

Fuel Waste-Water Adjust

Forecast:

a.	**$**	**4,001,768**
b.	**$**	**4,230,082**

Variables Needed:

Previous Year's Fuel Wwater Adjust:	4,264,357

Variables Used:

Dover Construction Values:	85,000,000.00
Trend	12

Equations Used:

a. FUEL_WWATER = 2422482.549 + 45361.41617*@TREND + 1034948.116*D06

b. FUEL_WWATER =
0.9439119195*FUEL_WWATER(-1) +
0.002410645569*CONSTRUC_VALU
ES + 1179631.69*D06

Total General Fund Revenue:

Forecast: **$ 43,002,523**

Variables Needed:
Previous Year's General Fund Revenue: 38,133,833

Other Variables Used:
Dover Unemployment: 483

Equation Used:
GENFUNDREV =
1.172224217*GENFUNDREV(-1) +
0.1581043808*D01*GENFUNDREV(-1) +
0.1962100932*D04*GENFUNDREV(-1) -
3514.684549*UNEMPDOVER

Revenue Forecasting
Forecast FY 2009 vs Expert Opinon 2009
as of January 18, 2008

Account Number	Description	2009 Forecast	2009 Expert Forecast	Difference	Variance
110-0000-311-01-00	PROPERTY TAXES a	9,887,504	9,737,672	149,832	1.54%
	PROPERTY TAXES b	9,787,374	9,737,672	49,702	0.51%
	PROPERTY TAXES c	9,790,519	9,737,672	52,847	0.54%
110-0000-311-06-00	REALTY TRANSFER TAX	1,627,609	2,650,222	(1,022,613)	-38.59%
110-0000-319-01-00	PENALTIES - TAXES a	72,847	90,500	(17,653)	-19.51%
	PENALTIES - TAXES b	75,317	85,000	(9,683)	-11.39%
110-0000-321-01-00	BUSINESS LICENSES	1,451,514	1,450,000	1,514	0.10%
110-0000-321-11-00	BUILDING PERMITS	599,420	550,000	49,420	8.99%
110-0000-321-17-00	PLUMBING/HEATING/AIR COND	78,285	80,000	(1,715)	-2.14%
110-0000-321-22-00	RENTAL INSPECTION FEE a	294,173	300,000	(5,827)	-1.94%
	RENTAL INSPECTION FEE b	312,663	300,000	12,663	4.22%
110-0000-331-05-00	RECREATION a	119,000	140,000	(21,000)	-15.00%
	RECREATION b	106,458	140,000	(33,542)	-23.96%
110-0000-341-01-00	COURT OF CHANCERY FEES a	751,634	761,000	(9,366)	-1.23%
	COURT OF CHANCERY FEES b	1,028,769	761,000	267,769	35.19%
	COURT OF CHANCERY FEES c	757,345	761,000	(3,655)	-0.48%
	COURT OF CHANCERY FEES d	1,063,920	761,000	302,920	39.81%
110-0000-347-02-00	FINES RECEIVED	36,658	46,350	(9,692)	-20.91%
110-0000-347-06-00	KENT CTY BOOK REIMBURSEMT	334,404	450,000	(115,596)	-25.69%
110-0000-351-11-00	COURT OF COMM PLEAS FINES	155,443	154,000	1,443	0.94%
110-0000-351-12-00	J P COURT FINES	244,759	250,000	(5,241)	-2.10%
110-0000-351-13-00	POLICE DEPARTMENT FINES	307,217	230,000	77,217	33.57%
110-0000-369-12-00	FRANCHISE FEES	376,040	426,220	(50,180)	-11.77%
110-0000-369-16-00	POLICE EXTRA DUTY	319,687	300,000	19,687	6.56%
110-0000-369-36-00	TRASH REVENUE a	1,262,075	1,191,411	70,664	5.93%
	TRASH REVENUE b	1,168,052	1,191,411	(23,359)	-1.96%
110-0000-369-39-00	DSWA TRASH FEE REBATE a	217,697	167,500	50,197	29.97%
	DSWA TRASH FEE REBATE b	208,224	167,500	40,724	24.31%
	DSWA TRASH FEE REBATE c	142,259	167,500	(25,241)	-15.07%
	TOTAL GENERAL FUND REVENUE	43,002,523	32,654,821	10,347,702	31.69%
412-0000-369-41-00	WATER FEES a	4,410,581	4,415,619	(5,038)	-0.11%
	WATER FEES b	4,411,461	4,415,619	(4,158)	-0.09%
412-0000-369-42-00	SEWER FEES a	2,989,649	2,533,686	455,963	18.00%
	SEWER FEES b	2,583,285	2,533,686	49,599	1.96%
412-0000-369-43-00	FUEL/WASTE-WATER ADJUST a	4,001,768	4,307,001	(305,233)	-7.09%
	FUEL/WASTE-WATER ADJUST b	4,230,082	4,307,001	(76,919)	-1.79%
412-0000-369-86-00	IMPACT FEE-CURRENT RECPT	849,745	746,500	103,245	13.83%