



TOWN OF *Kiawah Island*

Mayor

John D. Labriola

Council Members

Maryanne Connelly
John Moffitt
Scott M. Parker, MD
F. Daniel Prickett

Town Administrator

Stephanie Monroe Tillerson

WAYS & MEANS COMMITTEE MEETING

Kiawah Island Municipal Center

Council Chambers

March 22, 2020; 3:00 pm

AGENDA

- I. Call to Order:
- II. Pledge of Allegiance
- III. Approval of Minutes:
 - A. Ways and Means Committee Meeting of February 22, 2021 [Tab 1]
- IV. Old Business:

None
- V. New Business:
 - A. Consideration and Recommendation to Town Council for Approval of the AirMedCare Contract Renewal [Tab 2]
 - B. Consideration and Recommendation to Town Council for the Approval of the Charitable Grant Recommendations [Tab 3]
 - C. Consideration the Approval of the Proposal from the Brand Consultant SDDO Partners [Tab 4]
 - D. Consideration and Recommendation to Town Council for Approval of the Contract with LS3P for the Municipal Garage Improvements [Tab 5]
 - E. Consideration and Recommendation to Town Council for Approval of the Proposal from Outdoor Spatial Design for Landscape Architectural Design Services [Tab 6]
 - F. Consideration and Recommendation to Town Council to Enter into a Contract with Evergreen Solutions to Conduct a Compensation and Benefits Study [Tab 7]
 - G. Consideration and Recommendation to Town Council for the Approval of the Proposal from Fast Signs for the Installation of a New Kiawah Island sign [Tab 8]
- VI. Chairman's Report:
- VII. Treasurer's Report:
 - A. Fiscal Year 2021-2022 Budget Discussion - Expenses [Tab 9]
- VIII. Committee Member's Comments:
- IX. Adjournment:



Tab | 1

WAYS AND MEANS

Agenda Item

WAYS & MEANS COMMITTEE MEETING

Kiawah Island Municipal Center

Council Chambers

February 22, 2020; 3:00 pm

Minutes

I. Call to Order: *Chairman Prickett call the meeting to order at 3:00 pm.*

II. Pledge of Allegiance

Present at the meeting: Dan Prickett, *Chairman*
John D. Labriola, *Mayor*
Maryanne Connelly, *Committee Member*
John Moffitt, *Committee Member*

Absent: Dr. Scott Parker, *Committee Member*

Also Present: Stephanie Tillerson, *Town Administrator*
Dorota Szubert, *Town Treasurer*
Petra Reynolds, *Town Clerk*

III. Approval of Minutes:

A. Ways and Means Committee Meeting of January 26, 2021

Mayor Labriola made a motion to approve the minutes of the January 26, 2021 Ways and Means Committee meeting. The motion was seconded by Committee Member Moffitt and was unanimously passed.

B. Ways and Means Committee Special Call Meeting of February 2, 2021

Committee Member Connelly made a motion to approve the minutes of the February 2, 2021 Special Call Ways and Means Committee meeting. The motion was seconded by Mayor Labriola and was unanimously passed.

Citizen's Comments: Agenda Items

Mr. Neal, with Island Beach Services, stated that he and Mr. Cyrulik were in attendance to answer any questions on their franchise agreement agenda item.

IV. Old Business:

None

V. New Business:

A. Consideration and Recommendation to Town Council for Approval of the Island Beach Services Franchise Agreement Amendment

Ms. Tillerson stated that the Town has had a franchise agreement with Island Beach Services (IBS) to provide umbrella and chair rental services for over thirty years. The Town, residents, and guests are pleased with the level of service provided by IBS.

The current franchise agreement with IBS was signed in January 2018 is set to expire on March 31, 2021. IBS has requested to be awarded the two-year extension provided for in the agreement commencing on April 1st and expiring on March 31, 2023.

Committee Member Connelly made a motion to recommend to Town Council the approval of the Island Beach Services Franchise Agreement Amendment. The motion was seconded by Mayor Labriola.

Mayor Labriola asked for an explanation of the Town's procurement process, how services are evaluated and why contracts provide for an extension.

Ms. Tillerson explained that Town Ordinance states that, depending on the cost of the services to be provided, the Town must go through a procurement process by obtaining three bid proposals or compiling a formal "Request for Proposals." Once a contract has been in place for a period of time, or a project is proposed, the services will be put out to bid to make sure any organization providing the services has the opportunity to submit a proposal and to ensure the Town receives competitive pricing. As part of a services contract, with Council's approval, an extension period is provided, allowing the Town to revisit the contract and do any modifications if necessary.

Following the discussion, the motion was unanimously approved.

B. Consideration and Recommendation to Town Council for Approval of the Night Heron Park Franchise Agreement

Ms. Tillerson stated a franchise agreement with the Night Heron Park Company has been in place for over twenty years. The agreement allows the Kiawah Island Golf Resort to provide umbrella, chair, and kayak rental services in a designated area in front of the Sanctuary. The current franchise agreement was signed in March of 2018 is set to expire as of March 31, 2021. Night Heron Park Company is requesting to enter into a new five (5) year agreement with the Town commencing on April 1st and expiring on March 31, 2026.

Committee Member Connelly made a motion to recommend to Town Council the approval of the Night Heron Park Franchise Agreement. The motion was seconded by Mayor Labriola and was unanimously passed.

C. Consideration and Recommendation to Town Council for Approval of the Agreement with Kimley-Horn

Ms. Tillerson stated that in 2018 when concerns were raised with the traffic on Beachwalker Drive, Kimley-Horn were the consultants that performed a traffic analysis and recommended the addition of a turn lane at the entrance to the County Park. They also provided roadway design services and construction administration for the Beachwalker improvements.

In 2019, Kimley-Horn provided Transportation Planning and Engineering Services for concerns raised with development in the Duneside Drive area. These recommendations included the addition of speed tables and additional signage.

Ms. Tillerson stated that additional safety concerns had been raised along Beachwalker Drive. To complete the loop of pedestrian and safety studies, the Town would like Kimley-Horn to complete a Pedestrian and Bicycle Safety Study on Beachwalker Drive. The purpose of this study will be to analyze continuous bicycle paths, analyzed options for raised pedestrian crossings, and analyze safety options for the cohesion between bicycles, pedestrians, and vehicles. To supplement the

Beachwalker Drive Pedestrian and Bicycle Safety Action Plan, they will analyze the potential geometric improvements to the Beachwalker Drive at Kiawah Island Parkway intersection. The cost of the study would be \$16,500.00, with additional cost envisioned to implement the recommendations.

Committee Member Connelly made a motion to recommend to Town Council the approval of the agreement with Kimley-Horn. The motion was seconded by Mayor Labriola.

Committee member discussion included that future development is taken into consideration as part of the study and included in the contract along with the study look at several scenarios concerning the improvement of the intersection.

Following the discussion, the motion was unanimously approved.

D. Consideration and Recommendation to Town Council for Approval of the Contract for Services with LS3P for the Wet Trash and Recycling Center at the Municipal Center

Ms. Tillerson stated that at the January 2021 Town Council Retreat, the Public Works Manager discussed the issues the Town faces with the trash and recycling center currently located on Kestrel Court. For many years there has been a problem with trash being left on the ground throughout the site even when the trash and recycling bins are not full. To remedy the problem, the Town swapped out the dumpster for compactors to increase capacity, increased the recycling bin size, installed security cameras, and added more and larger signage. Still, the problem persists and has continued to get worse over time as the Island grows.

The Town has very limited options to make improvements or the staff to manage the current site properly. The recommendation had been made to relocate the wet trash and recycling center from the Kestrel Court location to the Municipal Center next to the garage. The Town can better manage and control the trash and recycling center by establishing operation hours, adding appropriate lighting and security system, adding appropriate signage, and controlling the center for better access by patrons and the waste management company. The request is to enter into a contract with LS3P for Programming & Conceptual Design only in an amount not to exceed \$10,000.

Committee members discussed the recommendation and agreed to move forward with the design phase of the proposal.

Mayor Labriola made a motion to recommend to Town Council the approval of the Contract for Services with LS3P. The motion was seconded by Committee Member Connelly and was unanimously passed.

Citizen's Comments:

None

VI. Chairman's Report:

Chairman Prickett reported that the development of a procedure for obtaining emergency funding has been completed and is now in place.

VII. Treasurer's Report:

A. Fiscal Year 2021-2022 Budget Discussion - Revenues

Ms. Szubert began the Fiscal Year 2021-2022 budget discussion by reviewing history over the past fifteen years used to develop trends. She noted that a slow-growing trend in revenue sources could

be seen, pointing out that one of the biggest changes included the Town taking over the building permitting process and their total revenues along with improvements made in compliance with Accommodation Tax payments.

When the Town began preparation for the FY2021 budget, no one could foresee the financial impacts we would face due to the COVID-19 pandemic. In June 2020, Town Council approved a balanced budget with very conservative assumptions. In November 2020, mid-year evaluation of revenue performance allowed the Town to increase budgeted revenues by \$460,000.00. With the collections tracking on pace, the total revenues will exceed the amended amount by the end of the current fiscal year by \$1.7 million.

In preparation for the next year's budget, there is still a very high level of uncertainty. To be conservative, most of the revenues were budgeted based on FY2019 (pre-pandemic) levels. Overall, the total budgeted revenues of \$9.3 million for FY2022 are 2%, or \$185,000.00 lower than current year projections and 7%, or \$652,000.00 less than FY2019 actuals.

Ms. Szubert reviewed the comparisons that were made to FY2019 actuals unless otherwise noted:

- ✓ Building Permits revenue is estimated to decrease 9%, or \$88,000.00, mostly due to a slowdown in new construction activity on the Island. A one-time special project permit revenue is projected from the Parcel 13 development.
- ✓ Business Licenses revenue is estimated to increase 6%, or \$160,000.00. The increase is attributable to continuous enforcement efforts with licensing compliance.
- ✓ Berkeley Electric Coop, Beach Services, and Other Franchise fees are estimated with no change.
- ✓ Local Option Sales Tax is projected to increase by 2% or \$12,000.00 based on the overall trend.
- ✓ State Accommodation Tax revenue is projected to increase 2% or \$32,000.00 based on the overall trend.
- ✓ Local Accommodation Tax revenue shows 2%, or \$19,000.00 increase, based on the overall trend.
- ✓ The Town is estimating to receive \$200K in County Accommodation Tax. Due to the pandemic, Charleston County suspended all the tax remittances to their municipalities for the current year until the final review of the County's revenue performance for FY2021. It is a 59%, or \$284,000.00 decrease when compared to FY2019.
- ✓ Hospitality Tax revenue is estimated with no change when compared.
- ✓ Solid Waste revenue is estimated to increase 11%, or \$59,000.00. The increase is mostly attributable to additional efforts in garbage fee collection from rental properties.
- ✓ Interest Revenue shows 92%, or \$399,000.00. The decrease is attributable to the very low-interest rates market.
- ✓ Other revenues include the following sources:
 1. Aid to Subdivision - \$35,000.00 - no change
 2. Planning Fees - \$10,000.00 - no change
 3. Court Fees & Fines - \$25,000.00 - no change
 4. Beverage Permits revenue - \$45,000.00 - no change
 5. Victim's Assistance Fees - \$10,000.00 - no change
 6. Miscellaneous revenue - \$35,000.00 - no change

Ms. Szubert reviewed the five-year projections based on historical trends, pointing out revenues from future special projects she has included in the projections.

Committee members discussed the projections, comparison to FY2019, Investment revenues, and permitting leading indicators.

Ms. Szubert explained the new business license law passed by the State in September requiring all municipalities to standardize their business licensing process but does not regulate the fee structure. She noted that license and permit fees are set by Council and may be changed every other year. She reviewed the Town's current fee structure along with a comparison to other area jurisdictions. Her recommendation was to leave the existing fees "as is," considering the business that has been hurt by the pandemic noting there was an opportunity for reconsideration at a future date.

VIII. Committee Member's Comments:

None

IX. Adjournment:

Mayor Labriola made a motion to adjourn the meeting at 4:18 pm. Committee Member Connelly seconded the motion and was unanimously passed.

Submitted by,

Petra S. Reynolds, Town Clerk

Approved by,

F. Daniel Prickett, Chairman

Date



Tab | 2

WAYS AND MEANS

Agenda Item



Request for Ways and Means Action

TO: Chairman and Committee Members

FROM: Stephanie Monroe Tillerson, AICP, Town Administrator

SUBJECT: Meducare (AirMedCare Network) Municipal Site Membership

DATE: March 22, 2021

BACKGROUND:

On April 20, 2016, the Town entered into a one-year contract with AirMedCare Network (Meducare) to provide air medical transport services for Kiawah Island residents. Each additional year thereafter was renewed for one year. The current contract expires the end of April 2021. While the Town had a few air medical transport services during our five-year contract period, to our knowledge those individuals airlifted to the hospital were not Town residents. Therefore, the Municipal Site Membership plan was not activated.

In 2018, Mr. McAden notified us that AirMedCare Network stopped offering the Business Plan to new subscribers effective January 1, 2018, due to the continued decline in insurance rate reimbursement and the reduction of larger employers in the AirMedCare Network. The Municipal Site membership falls under the Business Plan, and therefore it was eliminated as well. However, those with an active Business/Municipal Site membership plan are grandfathered in with the option of renewing. If the contract lapses, the membership plan option we are currently participating in will no longer be available.

The Public Safety Committee considered the renewal at its February 10, 2021 regular scheduled meeting. After discussion, the Committee made a motion to recommend to the Ways and Means Committee that the AirMedCare Municipal Site Plan Membership be renewed for another year at the same cost of \$8,163.00 (annual).

ANALYSIS:

The Municipal Site Membership will cover transport that originates out of Charleston County. There is no cost to residents with medical insurance. A resident can upgrade to a full coverage membership for \$35.00 (annual) that will give them coverage in over 220 locations across 32 states. **Coverage also applies to renters provided that it is their primary residence.**

Resident Defined:

Any individual who owns a home on the island, regardless of whether it is their primary residence, would be considered a "resident" and eligible for coverage under the Municipal Site Plan (MSP). For example, John Q. Taxpayer's primary residence is in Columbia, SC and as such, he is considered part of that tax base. He owns a second home on Kiawah that he lives in for just three months out of the year. For purposes of the Municipal Site Plan, he would be considered a "resident" of Kiawah, covered by the plan and eligible to upgrade to a full membership for just \$35.00. That being said, if John lets Nephew Tim and his family use his beach house for a week during the summer, they would not be covered by the Municipal Site Plans.

Coverage:

The MSP will provide coverage for all **insured** household residents from a pickup location originating anywhere in Charleston County (this allows for coverage both on and off the island) and all subsequent flights. (For example,

patient is airlifted to MUSC and then transported to the burn unit in Augusta, GA. In this situation, both flights would be covered by membership.)

If a member resident is **uninsured** at the time of transport, Med-Trans Medical transport will bill the member the "Medicare Allowable Rate." The uninsured member resident may elect to pay \$35.00 to upgrade to a "Full Membership" and receive no bill along with gaining coverage across a 32-state service area

*****Any member resident may elect to obtain a "Full Membership" for \$35.00 per year. Again, this will provide full coverage across a 32-state service area and for the uninsured.**

ACTION REQUESTED:

Recommend to Town Council the approval of the request to renew the annual agreement with AirMedCare for Municipal Site Plan Membership services at an annual rate of \$8,163.00. It comes as a recommendation from the Public Safety Committee.

BUDGET & FINANCIAL DATA: If approved, the cost will be included in the FY 2020-2021 Budget.



Plan Code: 10228

**AirMedCare Network Municipal Site Membership
For Town of Kiawah Island, SC**

Organization: Town of Kiawah Island, SC
Physical Address: 4475 Betsy Kerrison Pkway
Kiawah Island, SC 29456

Contact: Petra Reynolds
Phone: 843-768-5101
Email: preynolds@kiawahisland.org
County: Charleston

Membership Sales Manager/Base: (Name/Base)

Covered Individuals and Transports:

Any individual who resides within the boundaries of Kiawah Island, SC when transported for medical necessity by MedTrans Corporation (or any AirMedCare Network Provider) will be covered under the standard terms and conditions for an AirMedCare Network membership (attached), except:

- Transport must be from a pickup location in Charleston County, SC; and
- If the covered individual transported is uninsured at the time of transport, MedTrans Corporation will bill the covered individual at the "Medicare Allowable Rate" for the transport.

Fees:

Kiawah Island, SC will pay to AirMedCare Network a total of \$8,163.00 annual.

Upgrade Benefit to Covered Individuals:

Any individual who resides within the boundaries of Kiawah Island, SC may elect to obtain a full household membership (which eliminates the exceptions listed above) by completing an application and paying the following fees:

Standard Annual Rate	*Senior Annual Rate
\$45	\$35
<i>*Senior rate is available to the primary and secondary household member if they are 60 years of age or older.</i>	

Duration:

This agreement will be effective upon AirMedCare Network's receipt of (a) this agreement signed by the participating Organization AND (b) payment of the amount as provided above. This agreement will be effective for one (1) year, and will be evaluated by both parties for renewal at least thirty (30) days prior to the end of the one (1) year term.





Terms and Conditions

AirMedCare Network is an alliance of affiliated air ambulance providers* (each a “**Company**”). An AirMedCare Network membership automatically enrolls you as a member in each Company’s membership program. Membership ensures the patient will have no out-of-pocket flight expenses if flown by a Company by providing prepaid protection against a Company’s air ambulance costs that are not covered by a member’s insurance or other benefits or third party responsibility, subject to the following terms and conditions:

1. Patient transport will be to the closest appropriate medical facility for medical conditions that are deemed by AMCN Provider attending medical professionals to be life- or limb-threatening, or that could lead to permanent disability, and which require emergency air ambulance transport. A patient’s medical condition, not membership status, will dictate whether or not air transportation is appropriate and required. Under all circumstances, an AMCN Provider retains the sole right and responsibility to determine whether or not a patient is flown.
2. AMCN Provider air ambulance services may not be available when requested due to factors beyond its control, such as use of the appropriate aircraft by another patient or other circumstances governed by operational requirements or restrictions including, but not limited to, equipment manufacturer limitations, governmental regulations, maintenance requirements, patient condition, age or size, or weather conditions. FAA restrictions prohibit most AMCN Provider aircraft from flying in inclement weather conditions. The primary determinant of whether to accept a flight is always the safety of the patient and medical flight crews. Emergent ground ambulance transport of a member by an AMCN Provider will be covered under the same terms and conditions.
3. Members who have insurance or other benefits, or third party responsibility claims, that cover the cost of ambulance services are financially liable for the cost of AMCN Provider services up to the limit of any such available coverage. In return for payment of the membership fee, the AMCN Provider will consider its air ambulance costs that are not covered by any insurance, benefits or third party responsibility available to the member to have been fully prepaid. The AMCN Provider reserves the right to bill directly any appropriate insurance, benefits provider or third party for services rendered, and members authorize their insurers, benefits providers and responsible third parties to pay any covered amounts directly to the AMCN Provider. Members agree to remit to the AMCN Provider any payment received from insurance or benefit providers or any third party for air medical services provided by the AMCN Provider, not to exceed regular charges. Neither the Company nor AirMedCare Network is an insurance company. Membership is not an insurance policy and cannot be considered as a secondary insurance coverage or a supplement to any insurance coverage. **Neither the Company nor AirMedCare Network will be responsible for payment for services provided by another ambulance service.**
4. Membership starts 15 days after the Company receives a complete application with full payment; however, the waiting period will be waived for unforeseen events occurring during such time. Members must be natural persons. Memberships are non-refundable and non-transferable.
5. Some state laws prohibit Medicaid beneficiaries from being offered membership or being accepted into membership programs. By applying, members certify to the Company that they are not Medicaid beneficiaries.
6. These terms and conditions supersede all previous terms and conditions between a member and the Company or AirMedCare Network, including any other writings, or verbal representations, relating to the terms and conditions of membership.

*Air Evac EMS, Inc. / Guardian Flight, LLC / Med-Trans Corporation / REACH Air Medical Services, LLC — These terms and conditions apply to all AirMedCare Network participating provider membership programs, regardless of which participating provider transports you.



Agreed to by:

Signature

Printed Name

Title

Organization Name

Date

Signature

Keith Hovey

Printed Name

Vice President

Title

Membership

Division

Date





Tab | 3

WAYS AND MEANS

Agenda Item



Tab | 4

WAYS AND MEANS

Agenda Item



REQUEST FOR TOWN COUNCIL ACTION

TO: Mayor and Members of Town Council

FROM: Stephanie Braswell, Communications Manager

SUBJECT: Request for approval of contractual proposal with brand standards consultant in preparation for TOKI website redesign

DATE: March 17, 2021

BACKGROUND:

This year the Town will embark on a website redesign project to pursue an improved website for the community. The redesign intends to ensure that the end product reflects the Kiawah brand and the Town's identity within the community for our present and future needs.

One of the obstacles the Town encountered in the last redesign was the lack of established brand guidelines for the website firm to work from. To further complicate things, we technically have two logos (script logo, seal logo). We feature the seal in some places and the script in others.

ANALYSIS:

It is in the Town's best interest that we work with a consultant to advise and establish brand guidelines while the website RFP process is taking place for a website. Brand guidelines will establish a formal visual identity for the Town consisting of official color palettes, typography, rules for logo use, and messaging. These guidelines will help formulate the best version of the Town's visual identity moving forward and allow for a smoother transition to a new website.

Local branding firm [SDCO Partners](#) is the preferred firm. They are firmly established with the Kiawah brand and are the producers of [Legends magazine](#), [Kiawah River](#) branding, and are the firm the Community Association used for their recent rebranding.

ACTION REQUESTED:

Staff requests Town Council approval of the proposal for the brand standards consultant as listed with SDCO Partners.

BUDGET & FINANCIAL DATA:

\$13,625 - Funds for this expenditure will be taken from the approved website redesign budget.

Contact

121 Wentworth Street
Charleston, SC 29401
843.722.6296

Portfolio

sdcopartners.com
[@stitchdesignco](#)



"When we set out to build this brand, we wanted to find partners whose vision and previous work felt bigger than just the product itself. SDCO Partners truly embodies that spirit. "

JESSICA MILLER
FOUNDER
COLORED COCKTAILS



About

SDCO Partners was founded in 2009 by designers and owners Amy Pastre and Courtney Rowson. Over the past decade, we've built a national and international presence, received accolades, reimagined brands and redefined industries through the power of collaboration, design, strategy, and story.

Most importantly, we've built meaningful, enduring relationships based on trust, communication, and the pursuit of excellence.



values

We strive for excellence - collaborating both internally and externally - challenging each other to find new ways to improve the company and the work we produce.

We are committed to creating a positive, creatively driven environment that encourages and fosters growth for ourselves and our clients.

We define success through meaningful partnerships, with team members, clients and collaborators.



Strategic Approach

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We are listeners and observers, constantly studying visual trends and great, enduring brands.

That means we ask a lot of questions and immerse ourselves in your brand, market, and industry to best understand the project goals, identify challenges and opportunities, hone your ideal audience, and differentiate you from the competition. Based on those insights, we explore the visual and written possibilities that lay the groundwork for the visual vocabulary and brand language — and set the foundation for brand development.

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Creating a voice that reflects the brand is an essential part of crafting the identity.

We collaborate with clients to ensure the copy communicates the most important information, elicits emotion, inspires action, and feels like a natural extension of the brand itself.

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We work collaboratively to develop an identity system that will serve as your library of branded assets.

The visual identity typically includes a main logo, secondary logo configurations, sub marks, graphic elements, a font family, and color palette. These elements are organized into a comprehensive document created at the end of the development process to assist you in understanding the identity system and as a guide for its application.

Our process is thoughtful, interactive, iterative, collaborative — and designed to produce smart solutions to real world challenges.

Key Steps in our Process

NO. 01 ——— Discovery

Through research and inquiry, we reveal your brand's purpose and goals and begin the exploration of the visual vocabulary and brand language.

NO. 02 ——— Brand Development

With brand purpose, project goals, and visual and language direction confirmed, we craft a visual identity and messaging system that serve as your brand guide and library.

NO. 03 ——— Implementation

From print materials and environmental design to websites, digital media, packaging, products, photography, and video direction, we craft, produce, and apply your brand to the mediums and platforms that create the greatest impact.

Scope of Services

Town of Kiawah
Brand Development, Messaging
and Guidelines

Discovery

VISUAL RESEARCH / DISCOVERY MOODBOARD

A design exercise in which we share relevant examples we've gathered from both inside and outside of your industry to help us understand your aesthetic preferences and needs.

Deliverable

A discovery document that lays the foundation for brand development and summarizes our research and findings.

Brand Identity and Messaging

MULTIPLE IDENTITY DIRECTIONS

Main Logo Identity
Secondary Logo Configurations
Sub-marks and Graphic Elements
Sizing and Lockup
Font Family and Typography Use Guidelines
Color Palette and Use Guidelines
Conceptual Application Examples

POSITIONING

A concise description that summarizes what your brand does, who your brand targets, and why you're different from your competitors

BRAND PURPOSE

The reason why your brand exists, other than making a profit, or the difference your brand wants to make in the lives of its customers

KEY ATTRIBUTES

The key personality traits, or characteristics of your brand

BRAND DESCRIPTORS

Short phrases that can quickly define your brand

Deliverable

A brand guide that outlines key components of your new visual identity and language.

Town of Kiawah
Brand Development, Messaging
and Guidelines

Project Management

Our Project Coordinator and Producer are client advocates and liaisons, ensuring that every project is delivered on-time, on-budget, and with excellence. From creation of comprehensive project schedules to day-to-day communication, they oversee every milestone and detail.



Proposed Budget & Payment Terms

\$13,625.00

Total Project Value of \$13,625.00 to be paid over a 3 month billing cycle at a fee of \$4,541.67 per month.

This estimate is based on 69 hours. Should the hours spent reach within a 5% tolerance of this total, the client will be notified before SDCO proceeds with additional work. Should the work outlined above not be completed within the 3 month billing window, SDCO Partners retains the right to renegotiate the fee for the remaining work or begin billing hourly at \$200/hr. Should the project conclude sooner than 3 months, the remaining balance will be billed in full at the time of completion. If the client terminates the project or places it on hold for an indeterminate period, Stitch Design Co. retains the right to collect the remaining balance for the full agreement.

Disclaimer

PRINTING This pricing is for design only. Estimates for printed pieces will be provided once the final design has been determined. SDCO Partners marks up all print related expenses by 25% as our firm receives industry pricing not available to the general public.

FILES Logo files will be provided to Client upon final approval. Logo files will be provided in .ai, .eps, .pdf and .jpg formats. No other digital native files will be provided to Client. Names of fonts used in designs will be provided to Client so that Client may purchase.

REVISIONS This estimate is based on certain parameters given by the client. Revisions incurred beyond this estimate will be billed at an hourly rate of \$200/hour. Client will be notified if project exceeds parameters of this estimate.

EXPENSES The client shall reimburse Stitch for all expenses arising from this assignment, including travel and lodging, the payment of shipping fees and costs associated with proofs and samples needed for this assignment, also including web related expenses such as font and plug in licenses.

MODIFICATIONS Modifications of the Agreement must be written, except that the invoice may include, and the Client shall pay, fees or expenses that were orally authorized in order to progress promptly with the work.

LIMITATION OF LIABILITY Client agrees that it shall not hold the Designer or its employees liable for any incidental or consequential damages that arise from the Designer's failure to perform any aspect of the Project in a timely manner, regardless of whether such failure was caused by intentional or negligent acts or omissions of the Designer or third party. Client assumes all responsibility for the copy writing and/or trademarking of all names and marks. Clients will not hold Designer responsible for omissions, typographical errors or other false information. Proofreading and correct information is a Client responsibility.

INTELLECTUAL PROPERTY Any and all intellectual property rights to any and all designs created by Stitch under the terms of this Agreement shall remain the property of Stitch until such time as the invoice has been paid in full. In addition, Stitch Design Co. retains the right to use designs created for the Client for purposes of self-promotion.

TIME OF PAYMENTS All invoices are payable within 30 days of receipt. A 2% monthly service charge is payable on all overdue balances. The grant of any license or right of copyright is conditioned on receipt of full payment.

DEFAULT IN PAYMENT The Client shall assume responsibility for all collection of legal fees necessitated by default in payment.

MISC Photography, Illustration and Copywriting will be billed separately, if needed.

BY SIGNING THIS ESTIMATE, CLIENT IS AWARE OF THE FOLLOWING This estimate does not include cost of printed materials. This estimate is based on certain parameters given by the client. If clients' parameters change, a new quote will need to be given. Client will be notified if actual costs are projected to exceed 5% before further work continues on project. Should client or designer stop the project at any time, client will be billed for work completed at the point of termination. Any delinquency in payment will result in a finance charge of 2%. This estimate is good for 30 days.

CLIENT SIGNATURE _____

DATE _____

Thank you for
this opportunity

Address

121 Wentworth Street
Charleston, SC 29401
843.722.6296

Email

meredith@sdcopartners.com



Tab | 5

WAYS AND MEANS

Agenda Item

Fee Proposal

March 17, 2021

Stephanie Monroe Tillerson, AICP
Town Administrator
4475 Betsy Kerrison Pkwy
Kiawah Island, SC 29455

Kiawah Island Municipal Wildlife Offices
Expansion
M701-210530

Dear Stephanie,

LS3P is pleased to offer our design services to the town of Kiawah Island for their proposed renovation and expanded Wildlife Biologist offices in the existing garage building.

The following proposal outlines our scope of services for the design, construction documents and construction contract administration phases for the Kiawah Island Municipal Wildlife Office expansion.

SCOPE

Programming & Conceptual Design

The Town wishes to expand into the first adjacent garage bay and convert to two (2) separate offices. The existing overhead garage door will be replaced with an insulated storefront unit and an additional window will be added to the rear of the building for the other office. Room finishes and associated MEP systems will be updated and expanded to satisfy the added program. Existing MEP systems will be modified and relocated as necessary. The existing restroom layout will also be studied for improvements. Finally, an additional wash area is desired to clean larger vehicles.

We anticipate the programming and conceptual design phase to take approximately 4-weeks.

Construction Documents and Bidding/Negotiation

Upon receipt of town's comments and approval of the Conceptual Design package we will proceed with the preparation of construction documents. This package will define and depict the necessary building and engineering systems necessary and required for constructing the center's enclosure. The final construction documents will include complete architectural, structural, plumbing, and electrical drawings and specifications.

Civil Engineering and landscape architecture (as required) shall be contracted separately by the Town; however, we will coordinate with them to ensure a comprehensive building design and set of documents.

We will assist with submission of all necessary drawings and documents for obtaining the building permit, exclusive of any civil/site permits. We anticipate one building package to include the permit documents for the

building on the site. Release of additional packages will be considered an additional service and a fee will be negotiated prior to release of the package(s). We anticipate the CD phase to take approximately 10-weeks and the bidding/ permitting phase subject to normal county and town review time.

Construction Contract Administration

LS3P and our consultants will provide construction contract administration services throughout the construction of this project. LS3P will conduct site visits by a Construction Contract Administrator (CCA). The CCA will provide a field report of each visit. This will result in a maximum of 4 visits by over the anticipated construction schedule.

Our consultants will visit the site at appropriate times while work relating to their discipline is underway.

We will review up to two rounds of each shop drawing for compliance with the construction documents. Additional shop drawing reviews will be invoiced as an additional service per the LS3P hourly rate schedule. Substitution requests from the contractor must be made during design or the bidding/negotiation phase. Review of substitution requests made during construction and any necessary redesign to accommodate such requests will be considered an additional service and will be invoiced per the LS3P hourly rate schedule.

EXCLUSIONS

We have excluded from our scope of design services as listed above the following:

1. Construction cost estimating
2. Representation or design beyond the described scope of design services as made part of this proposal
3. Providing services to investigate existing soil and environmental conditions including geotechnical conditions.
4. Providing topographic or property surveys
5. Full-time representation on site during construction
6. Environmental graphics and project signage
7. Landscape architecture design services including hardscape design
8. Civil engineering services

SCHEDULE

We propose the following production schedule for the project (subject to change based on town and county review process):

Programming and Conceptual Design

Mar. 22 – Apr. 19

Construction Documents

April 19 – June 21

Bidding & Permitting

June 21 – July 19

Construction

August 2 – Dec 6, 2021

COMPENSATION

For the scope of work outlined above, we propose the following fee:

BASIC SERVICES:

Programming & Conceptual Design	lump sum	\$10,688
Construction Documents & Pricing	lump sum	\$19,238
Bidding	lump sum	\$ 2,137
Construction Contract Administration	lump sum	\$10,687
SUB-TOTAL		\$42,750

Reimbursable expenses	estimated	\$ 1,500
TOTAL FEE		\$44,250

We will bill monthly to the percentage of the work completed in each phase. Please see the attached "Standard Agreement Provisions and Hourly Rates" for additional information regarding billing.

ADDITIONAL SERVICES

Additional services not covered in the above scope of work as part of this proposal but found to be necessary in final design production or construction administration services shall be recoverable. Revisions to the construction drawings as a result of "Value Engineering" or other Owner-requested changes shall be considered an additional service. Additional services for consultants are billed at 1.25 times the consultant's direct invoice to the Architect. Additional site visit trips outside of our proposed scope of services shall be billed hourly based on the attached hourly rate schedule.

REIMBURSABLE EXPENSES

In addition to our compensation, we would ask that we be reimbursed for expenditures incurred by LS3P and our consultants specifically for this project. These expenses will be invoiced monthly at our and our consultant's actual cost times a multiple of one and one-tenth (1.1) for administrative expenses. These expenses are outlined and described in the attached rate schedule as made part of this proposal.

This proposal includes an estimated amount of \$1,500 for reimbursable expenses. If the extent of reimbursable expenses reaches this amount, the client shall be advised of additional costs and shall approve the same before Architect proceeds with activities resulting in an expense.

CONCLUSION

We look forward to continuing to work with you on the Kiawah Island Municipal Recycling Center project. Please contact me with any questions regarding this proposal.

Sincerely,

LS3P ASSOCIATES LTD.

A handwritten signature in black ink, appearing to read 'D. Burt', with a long horizontal flourish extending to the right.

David Burt, AIA
Vice President / Principal

AGREED:

Town of Kiawah Island

By:

NAME

DATE



Tab | 6

WAYS AND MEANS

Agenda Item



Request for Ways and Means Committee Recommendation

TO: Ways and Means Chairman and Committee Members

FROM: Brian Gottshalk, Public Works Manager

SUBJECT: Request to Recommend Approval for Landscape Design Proposal

DATE: 22 March, 2021

BACKGROUND:

The natural beauty and landscape of Kiawah Island is one of its biggest attractions for residents and guests alike. Maintaining this attractive, natural look requires constant attention and care, specifically in maintained areas along roadways, common areas, and public buildings. The Municipal Complex was designed to be the “Gateway to Kiawah” and it is important that the standard for look and feel that is set on the island remains upheld, and perhaps exceeded, at Town Hall.

ANALYSIS:

In the nearly four years that The Town has been located at the current complex, it has become evident that the landscape needs significant upgrading and repair in a number of areas. The first, and most important is a safety aspect. As the landscape has established and grown, there are several areas on the complex that obstruct the line of sight for motorists and pedestrians, specifically at the first curve on the driveway and the turn into the visitor parking area.

Further, there are a significant number of plants and trees that have either died or failed to establish themselves, ultimately bringing down the quality of the overall landscape on the complex.

ACTION REQUESTED:

Town Staff requests that the Ways and Means Committee recommend to Town Council the approval of task 1 of this proposal from Outdoor Spatial Design.

BUDGET & FINANCIAL DATA:

The cost for Task 1 of this proposal is \$6,500 and would be sourced from the General Fund.





To: Brian Gottshalk, Jim Jordan, Town of Kiawah Island

Date: March 2, 2021

From: Evan W. Brandon, PLA, ASLA - Outdoor Spatial Design, LLC

Re: Landscape Design - Kiawah Island Town Hall

LANDSCAPE DESIGN PROPOSAL

Dear Brian and Jim,

This proposed agreement delineates professional services and applicable fees for Landscape Architectural Design Services for the above referenced property. It is our understanding that the client is **The Town of Kiawah Island** (client) and that **Outdoor Spatial Design, LLC**. (OSD) will be providing Landscape Architectural Design Services as follows:

Tasks:

1. OSD shall develop a 50% complete set of planting plans for review with the client. These planting plans will include the following:
 - a. Demolition and tree removal plan
 - b. Overall colored schematic planting plan with possible plant selections
 - c. Plant palette photo-board
2. To help illustrate the vision for the new landscape, OSD shall use existing site photography to create several 3D "before and after" renderings to show the proposed styles of plantings.
3. Based on input from the client, OSD shall progress the planting plans into a 100% pricing set. These planting plans will include the following:
 - a. Demolition and tree removal plan
 - b. Overall planting plan
 - c. Enlarged detailed planting plans
 - d. Overall plant schedule and planting details
4. OSD shall prepare an opinion of probable cost associated with the planting plans.
5. OSD shall provide (2) revisions to the planting plans based on client feedback. Any additional revisions will be billed out hourly as additional services.
6. As this landscape will likely be implemented in phases, OSD will separate out the planting plans and schedules once phases are determined. OSD shall also forward the drawings to (3-4) qualified landscape contractors, field questions, review pricing and negotiate with the contractor to help receive the best price to implement the landscape design.



7. Once the contractor has been selected and the Town enters into a contract with the landscape contractor, OSD shall be available to both the client and the contractor for questions and clarifications on an as-needed basis throughout construction. This will ensure that the drawings are followed correctly and will allow us to adjust the design as needed to allow for unforeseen field conditions. Construction observation includes:
 - a. On site construction coordination meetings to review and approve planting layout, quality and location, stake-out of bed lines, tree locations, lighting installation, etc.
 - b. On site “punch-list” inspection at substantial completion of all landscape and site construction.
 - c. On site inspection at completion of all landscape and site construction punch list items.
 - d. Miscellaneous phone calls, emails and coordination with the contractor and owners.

CLIENT’S RESPONSIBILITIES (Exclusions to Scope of Services)

The client shall provide the following information or services as required for performance of the work. Should OSD be required to provide services in obtaining or coordinating completion of this information, such services shall be charged as additional services. OSD assumes no responsibility for the accuracy of such information or services, may rely on the accuracy of such information, and shall not be liable for errors or omissions therein.

- A. Topography and boundary surveys (.pdf and .dwg formats).
- B. Legal descriptions of property.
- C. Soils investigations and / or engineering.
- D. Existing site engineering and utility base information (.pdf and .dwg formats).

STANDARD CONDITIONS

Landscape Architectural Services will be subject to the following Standard Conditions:

- A. This Agreement is to be signed and returned to Outdoor Spatial Design, LLC within 30 days in order to proceed with the described services. Otherwise, the offer to perform the described services may, in Outdoor Spatial Design, LLC’s sole discretion, be withdrawn and be null and void.
- B. Upon not less than seven days written notice, Outdoor Spatial Design, LLC shall suspend all services including access to drawing files if the client fails to pay in full within 60 days for services rendered or expenses incurred and for nonpayment of outstanding invoices. Outdoor Spatial Design, LLC shall have no liability because of such suspension of services or termination due to Client’s nonpayment.



- C. Invoices will be submitted monthly or after services are rendered and are payable within seven (7) days of receipt. Accounts with balances extending over 30 days will be assessed a finance charge that will be calculated at the rate of 1.50% per month for an annual rate of 18.0%
- D. Either Client or Landscape Architect may terminate this Agreement upon seven days written notice. If terminated by Client, Client agrees to pay Landscape Architect for all Basic and Additional Services rendered and Reimbursable Expenses incurred in accordance and conditions of this agreement, up to the date of termination.
- E. Outdoor Spatial Design, LLC shall not be responsible for delay caused by circumstances beyond its reasonable control.
- F. Outdoor Spatial Design, LLC assumes no liability for the accuracy of surveys and survey information and may rely on the accuracy of survey information provided.
- G. Client acknowledges and agrees that proper project maintenance is required after the project is complete. A lack of or improper maintenance may result in damage to property or persons. Client further acknowledges and agrees that, as between the parties to this Agreement, Client is solely responsible for the results of any lack of or improper maintenance.

COMPENSATION

- A. The Client shall compensate OSD for services described above and in accordance with the Terms and Conditions of this Agreement on a lump sum by phase basis, plus expenses. Services will be billed by phase plus expenses as follows:

Task:	Fees:
• Task 1	\$6,500.00
• Task 2	\$4,000.00
• Tasks 3-5	\$8,000.00
• Task 6	Hourly as needed
• Task 7	Hourly as needed

Note: Fees for Sub-Consultants including, but not limited to lighting, electrical, irrigation and structural engineering are not included and, if needed, will be billed as a reimbursable expense plus handling fees (with approval from owner).



- B. Schedule of Rates indicated below does not include allowances for overtime in excess of a forty-hour workweek. Travel time to and from the office of the Landscape Architect to the work site shall be billed hourly in addition to the design fee outlined above. *(These rates are valid for six months from the date of this contract):*

<u>Personnel</u>	<u>Hourly Rate</u>
Principal	\$150.00
Landscape Architect	\$125.00
Project Manager	\$105.00
Designer	\$85.00

Reimbursable Expenses

Mileage	Subject to Federal Guidelines
Large Format Color Prints	\$8/sq ft
Large Format Black and White Prints	\$2/sq ft
11x17 Color Print	\$3.50 ea
11x17 Black and White Print	\$1.50 ea

- C. Additional Services include but are not limited to:
1. Plan preparation for and construction observation of portions of the project let on a segregated bid basis or to be phased during construction.
 2. Site visits over and above the number stated in this contract.
 3. The preparation of public agency documents other than plans specified in this proposal, or meetings/negotiations with regulatory agencies.
 4. Revisions to approved drawings and the preparation of alternates or deductive change orders requested by the Client.
 5. Design or product research for planters, pools, garden furniture or other garden elements not specified in this proposal.
 6. Visits to plant nurseries to select plant material.
 7. Services with respect to replacement of any work damaged during construction.
 8. Services required as a result of the default or insolvency of contractor.
 9. Preparation of as-built, record drawings or of measured drawings of existing conditions.



10. Providing prolonged construction observation should the construction time be substantially extended through no fault of OSD.
11. Design changes if budget is adjusted by +/- 10%.
12. Consultation in regards to drainage issues, other than standard grading plan, on lots where site drainage is problematic.
13. Consultation with irrigation consultants regarding preparation of irrigation plans

NOTE: OSD will be happy to provide any of these additional services at the request of the client.

If you accept the terms of this proposal, please sign at the bottom and return (1) copy as acceptance of conditions stated herein. If you have any questions regarding the terms of this agreement, please do not hesitate to call.

Thank you,

A handwritten signature in black ink that reads 'Evan Brandon'.

Evan W. Brandon, PLA, ASLA
Principal

Outdoor Spatial Design, LLC
1060 East Montague, STE 315
North Charleston, SC 29405
843.718.5554

Accepted by: _____

Date: _____



Tab | 7

WAYS AND MEANS

Agenda Item



Request for Ways and Means Action

TO: Chair and Ways and Means Committee Members

FROM: Stephanie Monroe Tillerson, AICP, Town Administrator

SUBJECT: Compensation Study

DATE: March 22, 2021

BACKGROUND:

The Town will conduct a Compensation Study ("Study") to update the Town's job descriptions as necessary and provide compensation and benefits information sufficient to assist the Town Administrator and Mayor with compensation decisions. The Mercer Group completed the last Compensation Study in January of 2018. SHRM (Society for Human Resource Management) recommends as a general rule that employers examine the overall salary structure at least every three to five years to determine whether the structure is still aligned with your needs and the labor market.

My goal in updating the compensation plan is to establish a compensation plan that is consistent with prudent public practices; to provide a defensible and technically sound basis for compensating employees; and to ensure that the Town's compensation practices are competitive, both for employee recruitment and retention, and consistent with those of comparable employers.

With that goal in mind, I prepared and posted an RFP that detailed the Town's requirements for the Study. The Town received seven RFP responses. A staff team of three that included me have reviewed and discussed the RFPs based on the following criteria: Relative Experience and Qualifications of the Firm, Technical Merits of the Proposal (methodology and scope), Ability of proposed approach to meet the needs of the Town, and Time-Line for delivery of a final report.

Each of the firms responding to the RFP had excellent experience and qualifications for delivering a Compensation Study as required by the Town. The staff team has unanimously chosen to recommend Evergreen Solutions, LLC, to complete the Town's Compensation Study for several reasons, including:

- The firm demonstrated extensive experience for the project: 17 years experience and a comprehensive client list of town, city, county, and other public agencies;
- In addition, they have worked in 19 communities in the State of South Carolina;
- The Study's methodology and scope were the most comprehensive and inclusive of the six other firms that responded; and
- A commitment to a high amount of communication and meetings throughout the process.

ACTION REQUESTED:

To recommend to Town Council to approve the request to enter into a contract with Evergreen Solutions, LLC in an amount not to exceed \$17,500.

BUDGET DATA: Funding source –from General Fund.

A Proposal to Conduct a Compensation Study for the Town of Kiawah Island, SC RFP #02-21

ORIGINAL



Evergreen Solutions, LLC

March 15, 2021



Evergreen Solutions, LLC

2878 Remington Green Circle - Tallahassee, Florida 32308
850.383.0111 - fax 850.383.1511

March 12, 2021

Ms. Stephanie Monroe Tillerson
Town of Kiawah Island

Dear Ms. Tillerson:

Evergreen Solutions, LLC is pleased to submit a proposal to conduct a Compensation Study for the Town of Kiawah Island. Our response is based on our review of your Request for Proposal (RFP #02-21), our experience working with hundreds of local governments throughout the country, our understanding of the South Carolina labor market, and our knowledge of best practices in human resources management.

Evergreen Solutions was formed in 2004 to provide an alternative to traditional consulting firms. We provide an innovative and effective option by focusing on clients needing partners and not simply another service provider. Evergreen Solutions is a female-owned business, certified as a W/MBE in many states and municipalities across the country. Evergreen is authorized to transact business in the State of South Carolina.

As a national firm, Evergreen Solutions continues to grow and our territory now includes clients in 46 states. In the State of South Carolina, Evergreen has worked with, or is currently on contract to work with, the following public sector clients in providing work similar in scope to the services being requested: Town of Mount Pleasant; Town of Cheraw; Town of Hilton Head Island; Town of Bluffton; Town of Mocks Corner; City of Spartanburg; City of Columbia; City of Mauldin; City of Chester; City of Goose Creek; City of Conway; City of Lancaster; Spartanburg County; Berkeley County; Beaufort County; Laurens County; Dorchester County; Charleston County; Horry County; Orangeburg County; Charleston Park and Recreation Commission; Greenville Water; Municipal Association of South Carolina; Berkeley-Charleston-Dorchester Council of Governments; Housing Authority of Florence; North Charleston Sewer District; Spartanburg County Public Library; Richland Library; Richland County Recreation Commission; Richland County School Districts One and Two; Pickens School District; and Rock Hill Schools.

In other states, Evergreen has worked with, or is currently on contract to work with, the following local governments in a variety of human resources and management capacities: Mahoning County, OH; City of Bloomington, IN; City of Urbana, IL; Carter County, TN; Blount County, TN; City of Pittsburgh, PA; County of Montgomery, PA; Ulster County, NY; Town of Bridgewater, MA; Town of Colchester, VT; City of Hyattsville, MD; City of Baltimore, MD; City of Annapolis, MD; City of Hagerstown, MD; City of Westminster, MD; Allegany County, MD; Washington County, MD; Calvert County, MD; Kent County Levy Court, DE; City of Newport News, VA; City of Suffolk, VA; City of Fredericksburg, VA; City of Covington, VA; City of Williamsburg, VA; County of Culpeper, VA; County of York, VA; Gloucester County, VA; Essex County, VA; Surry County, VA; Isle of Wight County, VA; Prince George County, VA; James City County, VA; Louisa County, VA; Loudoun County, VA; Spotsylvania County, VA; King George County, VA; Alleghany County, VA; City of Raleigh, NC; City of Goldsboro, NC; Union County, NC; Gaston County, NC; New Hanover County, NC; Guilford County, NC; Transylvania County, NC; Franklin County, NC; Haywood County, NC; Buncombe County, NC; Spokane County, WA; City of Albany, OR; Columbia County, OR; City of Page, AZ; City of Flagstaff, AZ; City of Prescott, AZ; Town of Sahuarita, AZ; City of Santa Fe, NM; City of Carlsbad, NM; City of Manitou Springs, CO; City of Fountain, CO; Grand County, CO; Ouray County, CO; Ft. Bend County, TX; Hood County, TX; Brazoria County, TX; Denton County, TX; Kaufman County, TX; Travis County, TX; Town of Little Elm, TX; City of Austin, TX; City of Fate, TX; City of Pearland, TX; City of Seguin, TX; City of Rowlett, TX; City of Sachse, TX; City of Pflugerville, TX; City of Buda, TX; City of Farmers Branch, TX; City of Fredericksburg, TX; City of Gonzalez, TX; City of South Padre Island, TX; City of Conroe, TX; City of Amarillo, TX; City of Mont Belvieu, TX; City of Duncanville, TX; City of Sunset Valley, TX; City of Broken Arrow, OK; Sedgwick County, KS; Shawnee County, KS; City of Lee's Summit, MO; City of Branson, MO; City of Columbia, MO; Jefferson County, MO; Jackson County, MO; St. Charles County, MO; City of Sarasota, FL; City of Winter Park, FL; City of Palm Beach Gardens, FL; City of Sunrise, FL; City of St. Petersburg,

FL; City of Hollywood, FL; City of Melbourne, FL; City of Orlando, FL; City of Ft. Myers, FL; Miami-Dade County, FL; Palm Beach County, FL; Alachua County, FL; Manatee County, FL; Pinellas County, FL; Palm Beach County, FL; Sarasota County, FL; City of Douglasville, GA; City of Alpharetta, GA; City of Brookhaven, GA; City of Statesboro, GA; City of Garden City, GA; City of Stockbridge, GA; City of Fayetteville, GA; City of Dublin, GA; City of Dunwoody, GA; City of Roswell, GA; City of Tybee Island, GA; City of Chamblee, GA; City of Savannah, GA; Forsyth County, GA; Lumpkin County, GA; Douglas County, GA; Worth County, GA; Cherokee County, GA; Baldwin County, AL; Lee County Commission, AL; City of Foley, AL; and many others. Information regarding the services provided to some of these local governments as they relate to the services being requested can be found in **Section 2** of our proposal.

The Evergreen Team is able to fully comprehend the challenges and goals of the Town of Kiawah Island because of our vast understanding of local government human resource management and the fact that we possess the necessary experience and expertise. Our team has significant expertise in conducting compensation studies for local governments and other public sector organizations as can be seen in **Section 2**.

Some of the human resource services Evergreen has focused on include: compensation studies; classification studies; salary and benefits surveys; staffing studies; workload analyses; performance evaluation and appraisal system design; recruitment, hiring, and retention studies; strategic and workforce planning; and labor pool availability.

Through our experiences in conducting this wide range of projects, we have gained knowledge of all operations in local government human resources management. As a result, our team knows how critical an effective a compensation system is to the overall operation of a proficient and progressive local government. Moreover, we have developed helpful methods and tools that assist our clients in implementing and maintaining our study recommendations and results.

Evergreen's approach to conducting a compensation study draws not only from extensive human resources work with local government clients, but also from direct feedback of our past clients. In essence, we offer you tools that are innovative as well as those that have been proven to work in real places with real people. Some of the key facets of our approach identified in **Section 3** of our proposal include:

- We emphasize communication as the key to successful study completion as well as implementation. Our team understands that compensation by its very nature creates anxiety in staff and managers alike. In order to ensure a successful study process and "buy-in" at implementation, Town administrators, department heads, and staff need to be involved in the process. This is a critical component of our communication plan. Continuous communication is ensured through the use of meetings/conference calls and the submission of written progress reports.
- Our methodology utilizes the latest in technology. In order to reduce the cost to our client partners and enhance wider participation, we offer all of our tools in an electronic format. In essence, every step of the process can be done on the Web.
- We understand that one size does not fit all. Some consultants provide the same overall solution to every client; however, we provide a variety of alternatives that allow our client partners to select the solution that best meets their business and human capital needs.

As President of Evergreen Solutions, I am authorized to commit our firm contractually to this engagement. Attached is the Submittal Form along with the Non-Collusion Oath Form.

We appreciate this opportunity and commit to you our best effort if selected for this engagement. If you have any questions, please feel free to contact me at (850) 383-0111 or via email at jeff@consultevergreen.com.

Sincerely,



Dr. Jeff Ling, President
Evergreen Solutions, LLC

DATE: 3/12/2021, 2021

ORGANIZATIONAL INFORMATION

NAME OF OFFEROR: Evergreen Solutions, LLC

BUSINESS ADDRESS: 2878 Remington Green Circle
Tallahassee, FL 32308

BY SUBMITTING HIS PROPOSAL, THE UNDERSIGNED OFFEROR REPRESENTS:

1. that he has carefully examined specifications for the Services;
2. that he is familiar with all the conditions surrounding the performance of the Services;
3. that, if awarded the Contract, he will provide all labor, material, supplies, and equipment necessary to execute the Services in accordance with the Contract Documents;
4. that he understands that the Town reserves the right to reject any or all responses which do not meet the proposed requirements or all proposals in the event that the Project is canceled, postponed, or if it is in the best interest of Town of Kiawah Island;
5. that, if awarded the Contract, he will enter and execute a contract as required in the Invitation to Bid;
6. that the Offeror is legally able to enter into and perform a contract, if awarded;
7. that the Offeror is current on all taxes and fees owed to the Town.
8. that the Offeror has provided proof of insurance as required by the Town.

I. PERSONNEL:

Provide a list of personnel that will be committed to this engagement and their job function.

Included in Section 1 of our Proposal

II. EXPERIENCE:

At least three (3) references for similar work performed are required; however, you may provide as many as five (5) references.

1. COMPANY NAME: Town of Hilton Head, SC
 Contract Title: Classification & Compensation Study
 Contract Period: From 10/4/19 To 9/24/20
 Geographic Area Served: SC, NC, FL, IN
 Scope of Work: Classification and Compensation (see Section 2)
 Contracting Office: HR
 Contact Name: Angie Stone
 Title: HR Director
 Address: One Town Center Court
 City: Hilton Head Island State: South Carolina
 Telephone: (843) 341-4621
 Email: angies@hiltonheadislandsc.gov

Evergreen also previously worked w/ the Town.

II. EXPERIENCE (Continued):

2. COMPANY NAME: Town of Moncks Corner, SC
Contract Title: Pay and Classification Study
Contract Period: From 11/1/17 To 7/20/17
Geographic Area Served: SC
Scope of Work: Pay and Classification Study (See Section 2)
Contracting Office: HR
Contact Name: Jeff Lord
Title: Town Administrator
Address: 118 Carolina Avenue
City: Moncks Corner State: South Carolina
Telephone: (843)
Email: Jeff.Lord@town-mc.com
3. COMPANY NAME: City of Conway, SC
Contract Title: Employee Compensation & Pay Classification Study
Contract Period: From 7/1/18 To 12/1/18
Geographic Area Served: SC
Scope of Work: Employee Comp and Pay Class Study (See Section 2)
Contracting Office: HR
Contact Name: Lynn Smith
Title: HR Director
Address: P.O. Drawer 1075
City: Conway State: South Carolina
Telephone: (843) 488-7635
Email: lsmith@cityofconway.com

4.

COMPANY NAME:

City of Lancaster

Contract Title

Classification + Compensation Study

Contract Period: From

10/25/18

To

5/22/19

Geographic Area Served

SC and NC

Scope of Work:

Classification and Compensation Study (See Section 2)

Contracting Office:

HR

Contact Name:

Angela Roberson

Title:

HR Director

Address:

216 South Catawba Street

City

Lancaster

State:

South Carolina

Telephone:

(803) 289-1456

Email:

aroberson@lancastercitysc.com

Evergreen previously worked for the city as well

5.

COMPANY NAME:

Contract Title

Contract Period: From

To

Geographic Area Served

Scope of Work:

Contracting Office:

Contact Name:

Title:

Address:

City

State:

Telephone:

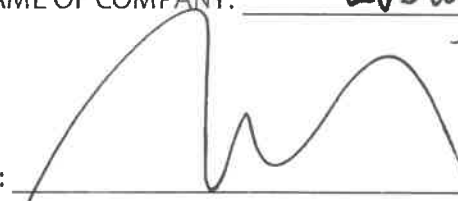
Email:

III. COST:

In Compliance with Request for Proposals, the undersigned hereby proposes to provide all services except as otherwise noted, for the following:

Proposed Cost
TOTAL COST: \$ 17,500 ⁰⁰ —

NAME OF COMPANY: Evergreen Solutions, LLC

By: 
Signature

Jeff King
Print Name

Title: President (i.e., Owner, Partner, Corporate Officer, etc.)

Address: 2878 Remington Green Circle

City: Tallahassee State: FL Zip: 32308

Telephone Number: (850) 383-0111 Business Fax Number: (850) 383-1511

Is your firm a _____ Corporation, _____ Sole Proprietorship, or ☒ Partnership?

LLC

If incorporated, please list state of incorporation: _____

FEIN or SSN: 20-183348

BUSINESS LICENSE:

The Offeror is not required to have valid business licenses to submit a Proposal. However, Offeror's must possess a valid Business License for business undertaken within the corporate limits of the Town of Kiawah Island.

Does your business have a valid **Town of Kiawah Island** Business License?

_____ Yes ☒ No If yes, list the number _____

Contact (843) 768-9166 with any questions. If no, a business license must be obtained upon award of the contract. ✓

INSURANCE:

The successful offeror, at his own expense, shall keep in force and at all times and maintain during the term of any contract resulting from this RFP the insurance requirements as outlined below.

PROFESSIONAL LIABILITY: \$1,000,000 per claim with a \$2,000,000 general aggregate limit. In no event shall the deductible on any such policy of insurance exceed \$25,000.

COMMERCIAL GENERAL LIABILITY: \$1,000,000 combined single limit per occurrence and must include the following coverages: (a) completed operations coverage, (b) blanket contractual coverage, including both oral and written contracts, (c) personal injury coverage.

AUTOMOBILE LIABILITY: \$1,000,000 combined single limit per accident for bodily injury and property damage.

WORKERS' COMPENSATION: Statutory limits are required by South Carolina state law and employer's liability limits of \$100,000 per accident.

The successful offeror shall provide an acceptable Insurance Certificate(s) and Endorsement(s) to the Town no later than the execution of any contract resulting from this RFP. The Town reserves the right to receive any additional documentation or information verifying insurance coverage as the Town deems necessary. The Town may contact the successful offeror's insurance agent(s) or carrier(s) directly concerning any insurance issues.

The Town of Kiawah Island must be advised immediately of any changes in required coverage(s).

INDEMNIFICATION

Except for expenses or liabilities arising from the negligence of the Town, the offeror hereby expressly agrees to indemnify and hold the Town of Kiawah Island harmless against any and all expenses and liabilities arising out of performance or default of any resulting contract as follows:

The offeror expressly agrees to the extent that there is a causal relationship between its negligent, reckless or intentionally wrongful action or inaction, or the negligent, reckless or intentionally wrongful action or inaction of any of its employees or any person, firm or corporation directly or indirectly employed by the offeror, and any damage, liability, injury, loss or expense (whether in connection with bodily injury or death or property damage or loss) that is suffered by the Town and its employees or any member of the public, to indemnify and save the Town and its employees harmless against any and all liabilities, penalties, demands, claims, lawsuits, losses, damages, costs, and expenses arising out of the performance or default of any resulting contract from this RFP. Such costs are to include any defense, settlement, or reasonable attorneys' fees incurred by the Town or its employees. This promise to indemnify shall include bodily injuries or death occurring to offeror's employees and any person directly or indirectly employed by the offeror (including without limitation any employee of any subcontractor), the Town's employees, the employees of any other independent contractors, or occurring to any member of the public. When the Town submits a notice, the offeror shall promptly defend any aforementioned action. This obligation shall survive the suspension or termination of this Agreement. The limits of insurance coverage required herein shall not serve to limit this obligation to indemnify. The recovery of costs and fees shall extend to those incurred in the enforcement of this indemnity.

MINORITY/WOMEN-OWNED ENTERPRISE:

Are you a Minority or Woman-Owned business? ☒ Yes ☐ No

If so, are you certified? ☒ Yes ☐ No *But not in SC*

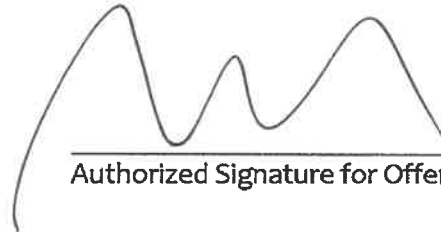
If you are certified, you must furnish a copy of your certificate with your submittal.

NON-COLLUSION OATH

COUNTY OF: Leon
STATE OF: Florida

Before me, the Undersigned, a Notary Public, for and in the County and State aforesaid, personally appeared Dr. Jeff Ling and made oath that the Offeror herein, his agents, servants, and/or employees, to the best of his knowledge and belief, have not in any way colluded with anyone for and on behalf of the Offeror, or themselves, to obtain information that would give the Offeror an unfair advantage over others, nor have they colluded with anyone for and on behalf of the Offeror, or themselves, to gain any favoritism in the award of the contract herein.

SWORN TO BEFORE ME THIS 12th DAY OF March, 2021



Authorized Signature for Offeror

Please print Offeror's name and address:

Jeff Ling, President
2878 Remington Green Cir
Dallahassee, FL 32308

Print Name: Jacqueline Barnes
Notary Public for The State of FL
My Commission Expires: 10/23/23

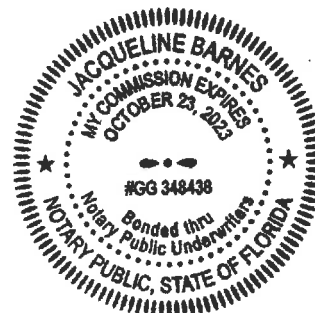


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Section 1.0

Qualifications to Meet Town's Objectives



1.0 *Qualifications to Meet Town's Objectives*

Evergreen Solutions, LLC is well qualified to conduct a Compensation Study for the Town of Kiawah Island due to our experience in conducting more than 600 of these studies for local governments and other public sector organizations across the country, including many in the State of South Carolina. In this section we provide you with our firm's profile and history, and the qualifications of our proposed project team.

2.1 Firm's Profile and History

Evergreen Solutions, LLC is a national, multidisciplinary, public sector management consulting firm, which specializes in working with public sector organizations, including hundreds of local governments, across the nation. We provide a unique approach, rather than the "consulting as usual" approach, by partnering with our clients to find innovative, real world solutions to public management.

Evergreen Solutions was formed in 2004 as a limited liability company to provide a modern, practical alternative to the typical consulting options. The firm is made up of management and human resource professionals as well as strategic partners who came together to form an innovative alternative that places clients and their needs before any individual, model, or corporate goal.

Evergreen's philosophy is based on an understanding that there is not a "one size that fits all" solution to compensation management. Our approach is built on working collaboratively with all parties to make sound, implementation-focused recommendations.

Evergreen Solutions is a female-owned business, certified as a W/MBE in many states and municipalities across the country. Evergreen is authorized to transact business in the State of South Carolina.

Our main focus is on people, management, and technology. This focus allows our team to provide a broad variety of services, including, but not limited to: compensation studies; classification studies; salary and benefits studies; performance appraisal reviews; workload analyses; staffing studies; disparity studies; training assessments; and strategic planning.

We invite you to browse our Web site at www.ConsultEvergreen.com or visit us on Facebook at www.facebook.com or LinkedIn at www.linkedin.com for more information about our services, staff, and past experience.



Evergreen Solutions assists public sector professionals in exercising control over the inter-related elements that determine success or failure. We do that by applying a situation-responsive discipline that emphasizes:

- full visibility into the entire organization through research and discovery;
- a spirit of partnership with staff and leadership;
- sound recommendations based on best practices and proven methods; and
- a practical go-forward plan that leads to quantifiable results.

Collectively, the members of the Evergreen Solutions Team have:

- extensive experience in conducting compensation studies for local governments and other public sector organizations throughout the country, including South Carolina;
- comprehensive experience in all components vital to the successful completion of this engagement;
- knowledge of relevant South Carolina statutes and regulations as well as federal regulations;
- objectivity and flexibility due to the fact that we have no vested interests; and
- specialized analytical tools that we bring to the project.

Clients nationwide have been successfully implementing recommendations from our team of professional consultants for decades. Evergreen has contracted with public sector, quasi-governmental, and non-profit organizations in 46 states throughout the country.

Exhibit 2-1 includes a sample list of local government clients that Evergreen has worked with, or is currently on contract to work with, in a variety of human resources management consulting capacities. Evergreen has also worked with many other public sector organizations in South Carolina, including: Charleston Park and Recreation Commission; Greenville Water; Municipal Association of South Carolina; Berkeley-Charleston-Dorchester Council of Governments; Housing Authority of Florence; North Charleston Sewer District; Spartanburg County Public Library; Richland Library; Richland County Recreation Commission; Richland County School Districts One and Two; Pickens School District; and Rock Hill Schools.



Exhibit 1-1: Sample List of Local Government Clients

Spokane County, WA	St. Charles County, MO	City of Kissimmee, FL	Duplin County, NC
City of Ridgefield, WA	City of Bloomington, IN	City of Sarasota, FL	Buncombe County, NC
City of Albany, OR	Blount County, TN	City of Palm Beach Gardens, FL	Franklin County, NC
City of Beaverton, OR	Carter County, TN	City of Plantation, FL	Gaston County, NC
Columbia County, OR	City of Urbana, IL	City of North Miami Beach, FL	Guilford County, NC
County of Monterey, CA	Mahoning County, OH	City of Melbourne, FL	Haywood County, NC
City of Flagstaff, AZ	Marshall County, AL	Alachua County, FL	Lee County, NC
City of Page, AZ	City of Foley, AL	Bay County, FL	New Hanover County, NC
City of Prescott, AZ	Baldwin County, AL	Brevard County, FL	Transylvania County, NC
Town of Sahuarita, AZ	Lee County, AL	Charlotte County, FL	Union County, NC
Pima County, AZ	Chambers County, AL	Citrus County, FL	Town of Carolina Beach, NC
City of Carlsbad, NM	City of Alpharetta, GA	Flagler County, FL	City of Covington, VA
City of Santa Fe, NM	City of Brookhaven, GA	Gadsden County, FL	City of Fredericksburg, VA
Ouray County, CO	City of Chamblee, GA	Gulf County, FL	City of Newport News, VA
Grand County, CO	City of Commerce, GA	Hernando County, FL	City of Suffolk, VA
City of Fountain, CO	City of Dahlonega, GA	Highlands County, FL	City of Williamsburg, VA
City of Manitou Springs, CO	City of Dalton, GA	Leon County, FL	Alleghany County, VA
Ogden City Corporation, UT	City of Douglasville, GA	Manatee County, FL	Chesterfield County, VA
City of Amarillo, TX	City of Dublin, GA	Martin County, FL	County of Culpeper, VA
City of Austin, TX	City of Duluth, GA	Miami-Dade County, FL	County of Northampton, VA
City of Buda, TX	City of Dunwoody, GA	Monroe County, FL	County of York, VA
City of Conroe, TX	City of Fayetteville, GA	Osceola County, FL	Essex County, VA
City of Duncanville, TX	City of Forest Park, GA	Palm Beach County, FL	Gloucester County, VA
City of Farmers Branch, TX	City of Garden City, GA	Pinellas County, FL	Isle of Wight County, VA
City of Fate, TX	City of Kingsland, GA	Santa Rosa County, FL	James City County, VA
City of Fredericksburg, TX	City of Roswell, GA	Sarasota County, FL	King George County, VA
City of Lakeway, TX	City of Savannah, GA	Seminole County, FL	Loudoun County, VA
City of Lockhart, TX	City of Statesboro, GA	Sumter County, FL	Louisa County, VA
City of Mont Belvieu, TX	City of Stockbridge, GA	City of Spartanburg, SC	Montgomery County, VA
City of Pflugerville, TX	City of Tybee Island, GA	City of Chester, SC	Prince George County, VA
City of Rowlett, TX	City of Woodstock, GA	City of Columbia, SC	Prince William County, VA
City of Sachse, TX	Cherokee County, GA	City of Isle of Palms, SC	Shenandoah County, VA
City of Seguin, TX	Douglas County, GA	City of Conway, SC	Spotsylvania County, VA
City of Sunset Valley, TX	Forsyth County, GA	City of Goose Creek, SC	Surry County, VA
City of Portland, TX	Lumpkin County, GA	City of Lancaster, SC	Northumberland County, VA
City of Padre Island, TX	Worth County, GA	City of Mauldin, SC	City of Baltimore, MD
Town of Little Elm, TX	Effingham County, GA	Town of Bluffton, SC	City of Annapolis, MD
Brazoria County, TX	City of Winter Park, FL	Town of Cheraw, SC	City of Hagerstown, MD
Denton County, TX	City of Fort Myers, FL	Town of Hilton Head Island, SC	City of Hyattsville, MD
Fort Bend County, TX	City of Coral Springs, FL	Town of Moncks Corner, SC	City of Westminster, MD
Hood County, TX	City of Daytona Beach, FL	Town of Mount Pleasant, SC	Allegany County, MD
Kaufman County, TX	City of Cape Coral, FL	Laurens County, SC	Charles County, MD
City of Broken Arrow, OK	City of Panama City, FL	Berkeley County, SC	Calvert County, MD
Sedgwick County, KS	City of Fort Walton Beach, FL	Charleston County, SC	Washington County, MD
Shawnee County, KS	City of Pensacola, FL	Dorchester County, SC	Kent County Levy Court, DE
City of Branson, MO	City of Gainesville, FL	Spartanburg County, SC	City of Kalamazoo, MI
City of Lee's Summit, MO	City of Jacksonville, FL	Beaufort County, SC	City of Pittsburgh, PA
City of Columbia, MO	City of Key West, FL	City of Goldsboro, NC	County of Allegheny, PA
City of Dardenne Prairie, MO	City of Lake City, FL	City of Raleigh, NC	County of Montgomery, PA
Clay County, MO	City of Orlando, FL	City of Hendersonville, NC	Ulster County, NY
Jackson County, MO	City of Dunedin, FL	Davie County, NC	Town of Colchester, VT

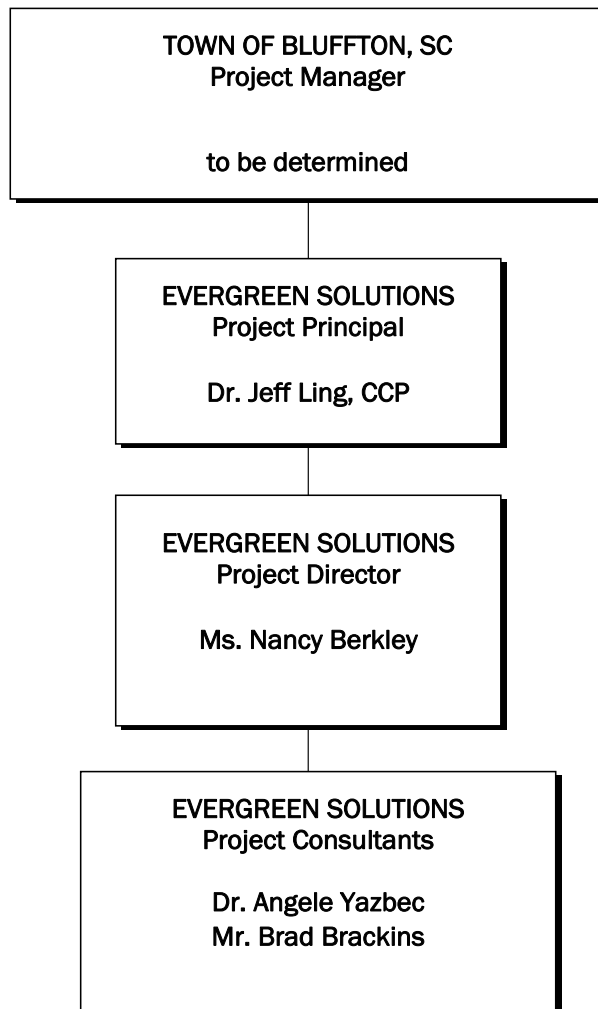


1.2 Proposed Project Team

Exhibit 1-2 Proposed Project Management Organization and Personnel Assignments

In this section we provide you with the qualifications of our proposed project team. Detailed resumes are available upon request.

Exhibit 1-2 reflects our proposed project management and personnel assignments. The structure has been designed to clearly define the roles and responsibilities of each part of the Compensation Study so that there will be no confusion as to who is responsible for any aspect of this engagement with the Town of Kiawah Island.



Town of Kiawah Island Project Manager. With each project engagement, we work with the client to identify one specific point of contact to serve as a Project Manager. The Town's Project Manager will be our reference point throughout the engagement. We will take project direction, leadership, and guidance from the Town's Project Manager and all project deliverables will be filtered through the Town's Project Manager throughout the duration of the project.



Evergreen Solutions' Project Principal. Our Project Principal will have ultimate accountability for the success of this project. Evergreen Solutions' Project Principal is always a senior leader in our firm, typically the President. The Project Principal will have contractual authority over the contract, and will be our top level of project responsibility.

Evergreen Solutions' Project Director. Evergreen Solutions designates a Project Director for each HR consulting project. The Project Director will work with the Project Principal regarding the scheduling of the project with the Town. The Project Director will have the most frequent contact with the Town's Project Manager and will assign project activities to the Project Consultants, and will ensure that deliverables are met within specified timelines.

Evergreen Solutions' Project Consultants. Our Project Consultants are a team of consultants who have worked together on numerous projects, and who will provide consulting and analytical work on all project activities. The Project Consultants will review pay plans, collect the data for the salary and benefits survey, and prepare draft and final reports.

Consultant Team Members must be thoroughly knowledgeable in the portion of the project they are responsible for, as well as have expertise in the issues that are unique to each individual client. Our firm is proposing an exceptional team of consultants who have worked together on many similar projects. We always make sure each project is sufficiently staffed to handle any additional tasks or unforeseen issues that may arise during the course of the study. The combination of our individual knowledge and skills form a superior team who will be able to competently perform all of the pieces of the Compensation Study for the Town of Kiawah Island.

Key Personnel

The following paragraphs provide summaries of each team member's qualifications and experience related to his/her role in this engagement.

Project Principal Dr. Jeff Ling, CCP

Dr. Jeff Ling is the President of Evergreen Solutions and has been with the firm since its inception in 2004. He is a Certified Compensation Professional (CCP) who has more than 25 years consulting experience in the following areas: human resources; performance improvement; process analysis; strategic planning; statistical analysis; research methodology; data management; surveys and polling; technology analysis; change management; and risk analysis.

Dr. Ling has planned, organized, and managed studies on human resources assessment, survey analysis, government efficiency, technology planning, information utilization, public opinion, market expansion, and privatization. Each of these studies dealt with summarizing major alternatives for decision makers and providing viable recommendations. He has consulting experience in public sector Evaluation, research management, efficiency analysis, survey analysis, statistical modeling, and technology planning.

Dr. Ling has worked with a multitude of clients in the capacity of Project Principal. He has worked on hundreds of engagements across the nation and



includes work in state and local governments, school districts, institutions of higher education, quasi-governmental agencies, and private industry.

Dr. Ling has been instrumental in creating, reviewing, and evaluating the methodology employed by Evergreen Solutions on all human resource engagements. His background and skill set make him uniquely qualified for assessing organizational critical needs and strategy. He is also an expert in policy development and long-term planning.

A sample of the types of studies Dr. Ling has been involved with include:

- Compensation/Classification– He developed the methodology and techniques for organizations to employ for successful data collection and implementation based on internal and external equity needs. He has been the Project Principal for numerous projects related to classification and/or compensation. **Note: He has served as the Project Principal for more than 600 Classification and/or Compensation studies for public sector clients.**
- Performance Evaluation – He has provided the framework for many organizations transitioning into goal based performance evaluation systems or fully functional merit-based pay structures. He understands the importance of a well stratified, objective based review process and has been instrumental in assisting a number of large organizations transition from traditional systems into merit-based pay structures with minimal transitional costs and interruption.
- Market Research – He provided the basis for which market research was collected, analyzed, and review. He ensured that data collection procedures and methods were statistically reliable using his knowledge of statistics and overall market research.
- Policy Development – He has a thorough and firm understanding of policy development and has assisted many clients with implementing tailored policies and practices that reflect best practices.

Dr. Ling holds a Doctorate's Degree from Florida State University in Political Science and has taught courses addressing research methodology, statistical analysis, technological innovations, and political economy at various universities.

**Project Director
Ms. Nancy Berkley**

Ms. Nancy Berkley is the Vice-President of Evergreen Solutions who has been with the firm more than seven years. She has over 30 years human resources experience demonstrating a thorough knowledge of multiple HR disciplines including, recruiting and staffing, workforce planning and retention, on-boarding, compensation and benefits, employee and labor relations, employee leave administration, voluntary and in-voluntary employee separations, performance management, employee surveys, organizational design and development, organization effectiveness, employee learning, training, and development, employee records administration and retention, and awards and recognition programs. She has



consistently enhanced organizational capability by integrating HR with strategic business planning, development and assessment. She has provided individualized executive coaching and led HR team development and high performance teams. She has led corporate change initiatives and built talent-rich organizations by strengthening people and integrating processes and has directed human resources in high-volume, transactional service organizations and high-level, consulting organizations. She has excellent conflict resolution, negotiation, and influencing skills.

Ms. Berkley possesses expertise in the following HR areas:

- Designing and implementing a shared service, centralized virtual staffing organization, increasing efficiency of staffing function for hiring managers.
- Analyzing and responding to employee relation trends—positively influenced work environments reducing employee complaints by ~90 percent.
- Consulting with senior leaders and successfully leading project teams to develop new policies, programs and tools—including total revision and communication of a company's HR policies and practices to be in accordance with state and federal laws;
- Creating HR metrics reviews utilizing business goals and human resources information systems data—set improvement goals and developed action plans for unique business requirements.
- Conceptualizing and implementing complex workforce reduction plans—then redeployed ~50 percent of the affected employees.
- Representing companies in state and federal agency reviews, e.g. Office of Federal Contract Compliance Program (OFCCP) reviews—Equal Employment Opportunity Commission (EEOC) charges, workers compensation charges, and unemployment compensation claims.

Some of the public sector projects that Ms. Berkley has directed or served on the Evergreen Team include: a Pay and Classification Study for the Town of Moncks Corner, SC; a Classification and Compensation Study⁷ for the Town of Bluffton, SC; a Classification and Compensation Study for the Town of Hilton Head Island, SC; a Classification and Compensation Study for Berkeley County, SC; Classification and Compensation Study Services for Beaufort County, SC; a Comprehensive Classification, Compensation, Performance Management, and Benefits Study for the City of Columbia, SC; an Employee Evaluation System for the North Charleston Sewer District, SC; a Classification and Compensation Study for the City of Goose Creek, SC; a Classification and Compensation Study for the Richland Library, SC; Classification and Compensation Plan Review for the City of Annapolis, MD; a Wages and Salary Scale Study for Washington County, MD; Personnel Manual Review and Revision Services for Calvert County, MD; a Classification and Compensation Study for Gloucester County, VA; a Compensation Study for



King George County, VA; a Pay and Classification Study for the Isle of Wight County, VA; a Classification and Compensation Study for Essex County, VA; a Compensation and Classification Study for Montgomery County, VA; a Classification and Compensation Study for Alleghany County and the City of Covington, VA; a Personnel Policy and Salary Study for Northumberland County, VA; a Pay and Classification Study for the City of Williamsburg, VA; a Classification and Compensation Study for Blount County, TN; a Comprehensive Classification and Compensation Study for Carter County, TN; Classification and Compensation Study Services for the City of Urbana, IL; a Compensation and Classification Study for the Central Ohio Transit Authority; a Compensation Update for the Central Ohio Transit Authority; a Classification and Compensation study for Transylvania County, NC; a Salary Equity Study for Guilford County, NC; a Position Classification and Compensation Study for Gaston County, NC; a Pay and Classification Study for Buncombe County, NC; a Classification and Compensation Study and Benefits Survey for New Hanover County and New Hanover ABC Board, NC; a Classification Study and a Compensation Survey for the City of Page, AZ; a Classification and Compensation Study for the Town of Little Elm, TX; a Human Resources Department Assessment for the City of Buda, TX; a Market Salary Update for the City of Buda, TX; a Classification and Compensation Study for the City of Pflugerville, TX; a Classification and Compensation Study for the City of Conroe, TX; a Comprehensive Compensation and Classification Study for the City of Farmers Branch, TX; a Classification and Compensation Study for the City of Portland, TX; a Comprehensive Compensation and Benefits Study for the City of Rowlett, TX; a Compensation Plan Study for the City of South Padre Island, TX; a Classification and Compensation Study for the City of Lockhart, TX; a Salary Compensation Study for Hood County, TX; a Compensation and Classification Study for Brazoria County, TX; a Classification and Compensation Study for Sedgwick County, KS; a Classification and Compensation Study for Jefferson County, MO; Classification and Compensation/Benefits Study for the City of Jacksonville Beach, FL; a Salary Survey for the City of Dania Beach, FL; a Classification, Compensation, and Benefits Study for the Town of Jupiter, FL; a Classification and Compensation Study for the Town of Cutler Bay, FL; a Comprehensive Compensation and Classification Study for the City of Panama City, FL; a Comprehensive Compensation and Classification Study for the City of Panama City Beach, FL; a Compensation Plan Update for the City of Panama City Beach, FL; a Classification and Compensation Study for the City of Destin, FL; a Compensation and Classification Study for Alachua County, FL; Job Audits for the City of Gainesville, FL; a Pay and Classification Study for the City of Fort Walton Beach, FL; a Compensation and Classification Study for the City of North Port, FL; a Compensation Study for the Village of North Palm Beach, FL; a Compensation Study for the City of Hollywood, FL; a Compensation Study for Lake County, FL; a Pay and Classification Study for Martin County, FL; a Performance Evaluation Study for Lake County, FL; a Compensation and Classification Study for Highlands County, FL; Compensation and Classification Study Services for Monroe County, FL; a Classification and Compensation Study for the City of New Smyrna Beach, FL; a Compensation Study for the a Compensation and Benefits Study and Analysis for the City of Dahlonega, GA; a Comprehensive Position Classification and Compensation/Benefits Study and Analysis for the City of Woodstock, GA; a



Compensation Analysis for the City of Alpharetta, GA; Employee Classification and Compensation Study for the City of Savannah, GA; Comprehensive Classification and Compensation Study for the City of Garden City, GA; a Compensation and Classification Study for the City of Brookhaven, GA; a Comprehensive Compensation and Classification Study for the City of Tybee Island, GA; a Pay and Classification Study for the City of Chamblee, GA; a Compensation Study for the City of Dalton, GA; a Pay and Classification Study for the City of Fayetteville, GA; a Wages and Salaries Compensation Study the City of Stockbridge, GA; a Compensation and Classification Study and Analysis for the City of Dublin, GA; a Classification and Compensation Study and Analysis for the City of Douglasville, GA; a Salary Survey for the City of Dunwoody, GA; a Compensation Study for the City of Statesboro; a Salary and Benefits Survey for the City of Roswell, GA; a Classification and Compensation Study for the City of Commerce, GA; a Compensation and Benefits Survey for Forsyth County, GA; a Compensation Market Study and Survey for Forsyth County, GA; a Compensation Study for the Forsyth County Public Library, GA; a Pay and Classification Study for Worth County, GA; a Classification and Compensation Study and Analysis for Douglas County, GA; a Job Description/Classification Study and Analysis for Douglasville-Douglas County Water and Sewer Authority, GA; and a Classification and Compensation Study for Lumpkin County, GA.

Ms. Berkley has a Bachelor's Degree in Psychology from Florida State University.

**Project Consultant
Dr. Angele Yazbec**

Dr. Angele Yazbec is a Consultant with Evergreen who has been with the firm more than two years. She possesses a Ph.D. in Cognitive Psychology from Florida State University, and has a strong background in quantitative and qualitative analysis. She is able to apply her knowledge and skills as a Consultant for Evergreen through various functions including: conducting market research and collecting compensation data, running regression analyses and recommending appropriate pay grades, and editing job descriptions.

Recent public sector projects that Dr. Yazbec has been involved with include: a Classification and Compensation Study for the Town of Bluffton, SC; a Classification and Compensation Study for the Town of Hilton Head Island, SC; a Wage and Compensation Study for the City of Isle of Palms, SC; Classification and Compensation Study Services for Beaufort County, SC; a Classification System and Pay Plan Development Study for Franklin County, NC; a Compensation and Classification Study for the City of Goldsboro, NC; a Classification and Compensation Study for the City of Hendersonville, NC; a Compensation and Classification Study for Transylvania County, NC; a Compensation, Classification and Benefits Study for Haywood County, NC; a Classification and Compensation Study for the Alliance Health, NC; a Management, Organizational Structure, and Efficiency Study for the Town of Carolina Beach, NC; a Comprehensive Position Classification and Compensation Study for Gaston County, NC; a Position Analysis and Revision Project for Harnett County, NC; a Compensation and Classification Study for Charles County Government, MD; a Salary Survey for the Charles County Correctional Officers Association, MD; Personnel Manual Review and Revision



Services for Calvert County, MD; a Compensation Study for the City of Hagerstown, MD; a Personnel Policy and Salary Study for Northumberland County, VA; a Classification and Compensation/Benefits Study for the City of Jacksonville Beach, FL; a Compensation, Classification, and Benefits Study for the Volusia County Sheriff's Office, FL; a Compensation Study for the Brevard County Property Appraiser's Office, FL; a Compensation Study for the City of Orlando, FL; a Comprehensive Compensation Study for The Florida Bar, FL; an Executive Director Compensation and Benefits Study for The Florida Bar; a Performance Evaluation Review for The Florida Bar, FL; a Compensation and Benefits Study for Loxahatchee River District, FL; a Pay and Classification Study for the Peace River Manasota Regional Water Supply District, FL; a Salary Survey and Gender Analysis for the Town of Medley, FL; a Pay Plan Study for Southwest Florida Water Management District, FL; a Pay Plan, Classification and Compensation Study and Analysis for the Okaloosa Gas District, FL; a 360 Degree Review for the City of Groveland, FL; a Classification, Compensation, and Benefits Study for the Village of Pinecrest, FL; a Classification and Compensation Study for the City of New Smyrna Beach, FL; a Compensation and Classification Study for the Town of Surfside, FL; a Salary Review for the City of Brookhaven, GA; a Compensation and Benefits Study and Analysis for the City of Woodstock, GA; a Compensation Study for the City of Dalton, GA; a Comprehensive Compensation and Classification Study of the City of Forest Park, GA; a Staffing Study for the City of Powder Springs, GA; a Classification and Compensation Study for the City of Powder Springs, GA; a Pay Study and Analysis for the City of Duluth, GA; a Salary Survey for the City of Dunwoody, GA; a Pay and Class Study for the City of Roswell, GA; a Comprehensive Employee Comp Study Plan for the City of Tybee Island, GA; a Pay Study of the Fire Department for the City of Albany, GA; a Compensation Study for the Forsyth County Public Library, GA; a Classification and Compensation Study and analysis for Effingham County, GA; a Classification, Pay and Benefits Study for Lee County Commission, AL; a Classification, Compensation, and Benefits Study for the Chambers County Commission, AL; a Compensation Study for the Auburn-Opelika Tourism Bureau, AL; a Compensation Survey for the Susquehanna River Basin Commission, PA; a Compensation, Classification, and Organizational Design Study for SUNY Ulster, NY; a Non-Union Compensation Study for Boston Public Health Commission, MA; a Classification and Compensation Study for Jefferson County, MO; a Classification and Compensation Study for Shawnee Community College, IL; a Classification and Compensation Study for the City of Portland, TX; a Compensation and Classification Study for Brazoria County, TX; a Classification and Compensation Study for Kaufman County, TX; an Employee Compensation Study for Tarrant Community College District, TX; a Salary Compensation Study for Hood County, TX; a Classification and Compensation Study for the City of Lockhart, TX; a Compensation Plan Study for the City of South Padre Island, TX; a Classification and Compensation Study for Santa Fe, NM; and a Compensation and Classification Study for Columbia County, OR.



Project Consultant
Mr. Brad Brackins

Mr. Brad Brackins is a Consultant at Evergreen Solutions and has been with the firm more than three years. With his background in data analysis and public administration, he assists public organizations in navigating the unique human resources challenges that they face today.

Mr. Brackins experience at Evergreen Solutions includes conducting compensation and classification studies. He works closely with organizations to gather employee feedback and organizational data in order to evaluate their current situation. He also conducts market studies in order to evaluate competitiveness with peer organizations. Through his research and analytical skills, he is able to use this information to formulate customized solutions that help public sector clients improve their ability to recruit and retain high-quality employees.

A sample of some of the recent public sector projects that Mr. Brackins has been involved with include: a Classification and Compensation Study for the Town of Bluffton, SC; a Classification and Compensation Study for Rock Hill Schools, SC; a Compensation Study for Horry County Government, SC; an Emergency Medical Services Salary Study for Spartanburg County, SC; an Employee Evaluation System for the North Charleston Sewer District, SC; a Pay and Classification Study for Buncombe County, NC; a Compensation and Classification Study for Union County, NC; a Classification and Compensation Study for Alleghany County and the City of Covington, VA; a Personnel Policy and Salary Study for Northumberland County, VA; a Classification and Compensation Study for Shenandoah County, VA; a Classification and Compensation Study Services for the City of Westminster, MD; a Classification and Compensation Study for Blount County, TN; Classification and Compensation Study Services for the City of Urbana, IL; a Classification Study for Jefferson Community College, NY; a Classification and/or Compensation Study for Orange County Community College, NY; a Compensation and Classification Study for SUNY Erie Community College, NY; Human Resources Consulting Services to the Redevelopment Authority for the County of Butler, PA; a Total Compensation Study for Spokane County, WA; a Classification Study for Spokane County, WA; a Salary Survey for the City of Lakeway, TX; a Salary Survey for the City of Carlsbad, NM; a Compensation Study for the City of Flagstaff, AZ; a Compensation and Classification Study for Jackson County 16th Judicial Circuit Court, MO; a Compensation Study Services for Jackson County, MO; a Classification and Compensation Study for Jefferson County, MO; a Compensation Plan Survey for Northwest Florida Beaches International Airport, FL; a Compensation Study for Monroe County School District, FL; a Compensation and Classification Study for the Broward County Housing Authority, FL; an Update to Salary Structure for CareerSource NE Florida; a Compensation Study for the City of Alachua, FL; a Compensation Study for the Florida Virtual School; a Compensation Study for the Town of Lady Lake, FL; a Job Classification and Compensation Study for the City of Parkland, FL; a Compensation, Classification, and Benefits Study for the Volusia County Sheriff's Office, FL; a Pay and Classification Study for the Town of Lake Park, FL; a Salary Study for the City of Holmes Beach, FL; a Job Classification and Compensation Study for the City of Parkland, FL; a Compensation and Benefits Study for Cherokee County, GA; a Compensation and Classification Study and Analysis for the



City of Dublin, GA; a Pay and Classification Study for the City of Fayetteville, GA; and a Compensation and Pay Classification Plan Study for the City of Foley, AL.

Mr. Brackins has a Master's Degree in Public Administration from Florida State University and Bachelor of Art's Degree in Business Administration from the University of Florida.



Note: A team of experienced analytical and clerical support staff will contribute to this study, as needed.



Section 2.0

Prior Work Performed



2.0 *Prior Work Performed*

In this section we provide you with a list of similar projects we have conducted, or are currently on contract to conduct. References are included on the Submittal Form along with the other required forms that we attached to our cover letter.

Select Relevant Experience

Because Evergreen has conducted over 600 projects that are similar in scope to the services being requested, we have included in this section only a sample of some of our local government work.

Classification and Compensation Study/Wage and Compensation Study Town of Mount Pleasant, South Carolina

Evergreen Solutions was hired in 2011 to assist the Town of Mount Pleasant to assist with a Compensation and Classification Study. The Evergreen Team conducted employee orientation sessions, focus groups, job analysis, market assessment, and provided recommendations.

Evergreen was again hired in the later part of 2015 to conduct a Wage and Compensation Study and Benefits Survey. The purpose of the study was to evaluate the Town's present wage and compensation plan, as well as its benefit package against those of comparable municipalities and competitive businesses, analyze and amend job descriptions, and develop a recommendation for improving the Town's current performance evaluation process and the forms used in this process. Attention was paid to private employers that competed for similar, qualified employees in the labor markets comparable to the Town. Evergreen is providing ongoing support with regard to salary classification and creation of job descriptions for new positions as they occur, and reclassification of current positions when requested.



Classification and Compensation Study Town of Hilton Head Island, South Carolina

Evergreen Solutions was engaged with the Town of Hilton Head Island to conduct a Classification and Compensation Study for all its employees. The study included the following primary objectives: to conduct a thorough, complete and accurate class specifications/job descriptions for all positions; appropriate valuation of each position relative to other Town positions; and to develop a competitive total rewards package (salary and benefits) relative to similar positions in the market.



Evergreen provided written guidelines for maintaining class specifications/job descriptions, for evaluating/re-evaluating job class specifications/job descriptions and for maintaining model compensation structure (s). Evergreen further recommended pay administration policies to include, but not be limited to, policies regarding movement through ranges, adjustments within pay grades, adjustments for assumption of additional duties (temporary or permanent), reclassifications, promotions, transfers, demotions, career ladders, etc. and recommended reliable external market data sources for salary structure adjustments and determination of merit budget. Upon recommendation to the Town for the implementation of a new classification and compensation program, Evergreen's consultants reviewed current performance management system documentation and provided recommendations to strengthen link between pay and performance as appropriate. In addition, Evergreen recommended future merit allocation approaches, considering changes to classification and compensation program and limited budgets. **Note:** Evergreen recently completed an update of the Town's Classification and Compensation Plan.



**Pay and Classification Study
Town of Moncks Corner, South Carolina**

Evergreen Solutions is engaged with the Town of Moncks Corner to conduct a Pay and Classification Study for its employees. As part of the study, Evergreen will conduct orientation sessions, focus groups, and interviews. Employees will complete a Job Assessment Tool (JAT) in order to analyze job duties and revise the current classification structure. A market salary survey will be issued to local and regional employers to assess market competitiveness. Based on the findings from the classification and compensation review, a new pay plan as well as policies and procedures will be recommended.



**Classification and Compensation Study
Town of Bluffton, South Carolina**

Evergreen Solutions is engaged with the Town of Bluffton to conduct a Comprehensive Classification and Compensation Study. Evergreen will review and validate current job descriptions for each Town position and update and/or create new job classifications and specifications as necessary to ensure they are current, describe use of current or emerging technologies, meet legal qualifications, and are consistent with Equal Employment Opportunities (EEO) and Americans with Disabilities Act (ADA) considerations. Evergreen will also conduct a compensation survey, analyzing information and developing recommendations for appropriate salary structure and allocation of classifications to pay ranges including longevity step and recommendations. In the end, Evergreen will meet with Town representatives as necessary to present results and recommendations derived from the study, to present cost impact,



and to propose a transition strategy. Evergreen will develop written and oral communications to employees explaining the reasons for the structure change (if any) and any impact to the employee.



**Classification and Compensation Study
City of Lancaster, South Carolina**

Evergreen Solutions was retained by City of Lancaster, SC to conduct a detailed compensation and classification analysis of its employees. Employees participated in focus groups, interviews, and job analysis to determine the best classifications for the work performed. In addition, pay ranges were analyzed in the public and private sector to determine the appropriate pay levels for all included jobs. Recommendations were provided to improve the fairness and equity.



**Classification and Compensation Study
City of Chester, South Carolina**

Evergreen Solutions was engaged by the City of Chester to conduct a comprehensive compensation and classification study for all City employees. The Evergreen Team conducted orientations and focus groups with general employees. Employees completed Job Assessment Tools, and supervisors completed Management Issues Tools, as needed. The data gathered through this process resulted in JAT scores for each job title, placement of each job into an internal hierarchy, and potential recommendations for revision to the current classification structure. Evergreen Solutions also conducted a comprehensive salary survey. The results will be combined with the internal hierarchy to help generate recommendations for a comprehensive compensation and classification structure. The Evergreen Team provided detailed recommendations for implementation of the new structure and related employee salary adjustments.



**Comprehensive Classification, Compensation, Performance Management and Benefits Study
City of Columbia, South Carolina**

Evergreen Solutions was retained by the City of Columbia to conduct a comprehensive evaluation of the City's current compensation and classification structure for its 2,352 employees. The primary objective of the study was to determine whether the City's current pay structure, policies, and practices were effective as compared to peer organizations or whether future adjustments were needed. Evergreen's consultants conducted a job-task



analysis/job audit of all employee positions to verify and validate information from existing job descriptions. Based on the data collected, Evergreen defined the essential functions of the job class, including, required education, experience, knowledge, skills, and abilities, to ensure compliance with ADA regulations; identified discrepancies between existing and proposed classifications; reported areas that were understaffed or underutilized; identified management, supervisory, professional, technical and general employees, including each employee's FLSA status (exempt/non-exempt); evaluated and recommended other programs that could be implemented by the City to attract candidates for hard-to-recruit positions; and developed a tool that the City could utilize to evaluate and process future reclassifications.

To ensure external equity, Evergreen consultants compared the City to what other local jurisdictions were doing as it related to salary ranges, steps within ranges, and range spread, and listed options and made recommendations that could improve the City's position in the market and its ability to recruit and retain qualified employees. Evergreen reviewed policies and procedures to determine consistency with prevalent practices among City governments and other local jurisdictions related to setting salaries for new hires, and handling transfers, promotions, additional duty pay and retroactive adjustments.

Evergreen also developed and recommended a new and revised performance appraisal instrument(s) that would support the City's mission and strategic objectives and the City's compensation philosophy, and would work in concert with the classification and pay system that was established. Evergreen consultants worked with the Human Resources Department and other City officials to link the proposed performance evaluation system to the pay structure, and identified any real or perceived internal equity and salary compression issues within the City's various departments/offices, and listed options to address such questions as to how these issues were addressed by other municipalities.

In the end, Evergreen provided recommendations to the classification and compensation structure along with associated costs or savings of implementing those recommendations. Evergreen also provided training/education presentations to managers and senior management staff to ensure that there was an understanding and commitment to the new classification and compensation system.



Compensation and Classification Study City of Mauldin, South Carolina

The City of Mauldin retained Evergreen Solutions to provide oversight into the data collection process regarding compensation and classification as well as provide recommendations following the collection of the data for the City to transition into a purely merit-based pay system. The purpose of the study was



to review the current structure that had not been updated in the last few years utilizing the position rating manual and position analysis questionnaire; review the salary survey methods and results collected from local municipalities and national IMCA data; verify overall grade placement and internal equity for the organization as a whole; ensure external equity with the marketplace; and provide oversight on transition to performance management, merit-pay system. As part of the study, Evergreen reviewed the materials provided by the City and gave feedback on best practices and market trends; analyzed internal equity data collected by City and gave feedback to address internal equity; reviewed salary survey data collected by the City for accuracy and provided insight regarding findings; developed the strategic position for the City utilizing collected data and desired intentions of the City; and assisted the City with developing transition plan.



Classification and Compensation Study City of Goose Creek, South Carolina

Evergreen Solutions was retained by the City of Goose Creek to conduct a Classification and Compensation Study. Evergreen reviewed the current classification system by including a job analysis, assessed job descriptions and made recommendations for changes; provided the tools necessary to maintain the classification system for future positions if a new classification system was recommended; and revised the current Compensation Plan based on the labor market. In the end, Evergreen provided recommendations for the ongoing internal administration and maintenance of the proposed compensation and classification plan.



Wage and Compensation Analysis City of Isle of Palms, South Carolina

Evergreen Solutions is retained by the City of Isle of Palms to conduct a Wage and Compensation Analysis. Evergreen will perform the following tasks:

- review the City's mission statement and align project goals and objectives to include classification and compensation compliance initiatives;
- review and analyze individual job titles and descriptions by conducting interviews or questionnaires to ensure they reflect current duties;
- conduct a comprehensive analysis of the current compensation program and make recommendations for improvement and suggest plans to address issues including but not limited to target



comparison market, internal equity assessment, salary compression, competitive salary analysis, index or standards for cost of living comparison, and strategies for recruitment and retention;

- identify comparable organizations and competitive labor market comparisons for position classifications and conduct a full compensation survey, including wages with monetary and non-monetary benefits, complete with recommendations and cost of implementation; and
- provide options and recommendations for a classification and total compensation plan, including feasibility of implementation that takes into consideration budget constraint.



Classification and Compensation Study City of Spartanburg, Spartanburg County, and Spartanburg County Public Library, South Carolina

Spartanburg County was retained Evergreen Solutions to complete a Classification and Compensation Study. This study included services for the City of Spartanburg and the Spartanburg County Public Library. Evergreen established a timeline to determine project milestones for the County, Library, and City and evaluated current employee data for each entity. Evergreen developed a classification plan; worked with the County's Project Manager to identify and survey targets for a salary survey, and provided an external assessment summary based on the results of the survey; proposed strategic positioning recommendations; and conducted a final solution analysis. In the end, Evergreen created a report that described the classification and pay plan; recommended procedures for the implementation and continued maintenance of the plans.



Employee Compensation and Pay Classification Study City of Conway, South Carolina

Evergreen Solutions was retained by the City of Conway to conduct an Employee Compensation and Pay Classification Study. The objectives of the study were to: attract and retain qualified employees; ensure positions performing similar work with essentially the same level of complexity, responsibility, knowledge, skills, and abilities are classified together; provide salaries commensurate with assigned duties; outline promotional opportunities and provide recognizable compensation growth; provide justifiable pay differential between individual classes; and maintain a competitive position with other comparable government entities and private employers within the same geographic area.



Salary Parity Study / Structural and Compensation Systems Study Charleston County, South Carolina

In 2005-06, Charleston County conducted a Classification and Compensation Review using another consulting firm. Then in 2007, Evergreen Solutions was hired by the County to review the results and verify the recommendations that accompanied the study. The primary issue examined by Evergreen was the internal equity relationships present within the County's pay plan. The Evergreen Team administered a job analysis tool to County employees that helped determine job worth and verify internal equity relationships as they relate to compensation. Although the study's primary emphasis was ensuring that internal equity relationships were proper, the study also ensured that employees were paid consistently with the market. Evergreen provided detailed recommendations for adjusting the County's pay and classification structure and developed an implementation plan complete with costing information.

Note: Evergreen was again hired to conduct a Structural and Compensation Systems Study. The Evergreen Team worked with elected official and employee committee throughout the process. Our phases included employee outreach, best practice research, and consensus building to recommend a 21st Century approach to compensation and classification management.



Comprehensive Market Analysis Charleston County, South Carolina

Evergreen Solutions was again hired to assist Charleston County with conducting comprehensive market analysis using selected benchmarks. A market survey was conducted to determine the external equity of the County against its peers.



Classification and Compensation Study Berkeley County, South Carolina

Evergreen Solutions was retained by Berkeley County to conduct a Classification and Compensation Study for 1,153 employees. Evergreen's consultants reviewed the County's current classification and compensation plan and recommended a consistent and competitive market position that the County could maintain based on a salary survey results from peer organizations. Evergreen recommended an appropriate salary range for each position in the County based on a review and analysis of the classification plan, the compensation survey results, internal relationships, and external and internal equity. Evergreen provided recommendations for the ongoing internal administration and maintenance of the proposed compensation and classification plan.



Pay and Classification Study Dorchester County, South Carolina

Evergreen Solutions was retained by Dorchester County Government to conduct a Pay and Classification Study and make recommendations for implementation of a revised pay plan. The study included all employees and classifications in the County. As part of the study, Evergreen conducted focus groups and interviews with employees, and employees completed a Job Assessment Tool (JAT). Evergreen conducted a comprehensive salary survey of local and regional employers to assess the market competitiveness of the County. Finally, a detailed plan was developed to provide the County with specific steps to implement an equitable and competitive compensation and classification plan. **Note:** Evergreen was recently hired to perform an update to the County's Compensation Plan.



Compensation Study Laurens County, South Carolina

Evergreen Solutions is retained by Laurens County to conduct a comprehensive wage study and analysis for regular and part-time positions. The goals of the study are to: ensure fair and equitable relationships within the organization; recommend and identify a consistent and competitive market position that the County can strive to maintain; remain cognizant of trends in wage or compensation inequality; and apply goals organization-wide, professionally, consistently and objectively.



Classification and Compensation Study Services Beaufort County, South Carolina

Evergreen Solutions is engaged with Beaufort County to provide Classification and Compensation Study Services. The purpose of the study is to address changes in county operations and staffing over the past decades, which may have affected the type, scope, and level of work being performed. The objectives of the study are to: attract and retain qualified employees; ensure positions performing similar work with essentially the same level of complexity, responsibility, and knowledge, skills, and abilities are classified together; provide salaries commensurate with assigned duties; clearly outline promotional opportunities and provide recognizable compensation growth; provide justifiable pay differentials between individual classes; and maintain a competitive position with other comparable governmental entities and private employers within the same geographic area. **Note:** This project is nearing completion.



Salary and Benefits Review, and Analysis City of Hyattsville, Maryland

Evergreen Solutions was hired by the City of Hyattsville to conduct a Salary and Benefits Review and Analysis of all classifications. The process included a comprehensive review of market compensation averages using a detailed duties-based salary survey approach as well as a comprehensive benefits survey. Market position was determined, a compensation philosophy was developed and strategic positioning recommendations were made with the goal of providing the City a more equitable compensation model. **Note:** Evergreen was again hired to conduct a Compensation System Analysis for the City.



Classification and Compensation Plan Review City of Annapolis, Maryland

Evergreen Solutions was engaged with the City of Annapolis to conduct a Classification and Compensation Plan Review. The primary objectives of the study were to: review and revise the current classification system; review and revise job descriptions; determine relevant competitive markets by conducting a salary survey of selected peer organizations; propose guidelines for an improved or new compensation program; and provide recommendations to keep the current pay structure competitive.



Classification and Compensation Study Services City of Westminster, Maryland

Evergreen Solutions was retained by the City of Westminster to provide Classification and Compensation Study Services. The scope of work included the review and updating of the City's current job descriptions as well as providing technical assistance in the development of a comprehensive performance evaluation system to integrate with the new classification system. The primary study objectives for this study was to:

- develop a formal compensation philosophy for adoption by the Mayor and Common Council;
- identify comparable benchmark employers to guide the City's future employee salary and benefit decisions to facilitate the attraction and retention of high performance staff members, while being financially sustainable;
- establish a comprehensive job classification system using the approved job evaluation system that accommodates the City's needs for an internally and externally equitable, defensible, market



sensitive, and easily administered system for all current and future positions within the City;

- train Human Resources staff to apply the adopted compensation philosophy to maintain the adopted classification and compensation system; and
- provide legally defensible classification specifications (ADA, FLSA, and any other applicable federal and state laws).



Compensation Study City of Hagerstown, Maryland

Evergreen Solutions was retained by the City of Hagerstown, MD to conduct a Compensation Study. Evergreen's consultants worked with the City to evaluate what type of pay plan would reinforce current and future goals. Evergreen identified external targets for surveying select positions. After conducting the market salary survey, Evergreen produced a pay plan for employees that best met the needs of the City and included the number of grade, steps, and ranges as well as recommendations for continued administration of the compensation system.



Compensation Study Allegany County, Maryland

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



Wages and Salary Scale Study Washington County, Maryland

Evergreen Solutions was retained by Washington County to conduct a comprehensive study of the County's wages as they related to neighboring jurisdiction's wages and salaries—the purpose of which was to assure adequacy of pay and employee wages when compared to area private and public employees. Evergreen met with each Division Director to gather information regarding pay issues that were unique to their departments. Evergreen conducted a brief review of the method of classifying positions to ensure its adequacy in today's pay and classification environment. Using the current or revised classification system, Evergreen evaluated all positions and placed them in an appropriate "grade". Evergreen recommended a system the County could use in the years to come to evaluate job positions.



Classification, Compensation, and Benefits Survey Kent County Levy Court, Delaware

Evergreen Solutions was hired by Kent County Levy Court (KCLC) in Dover, Delaware to conduct a Classification, Compensation, and Benefits Study. Evergreen's consultants reviewed all current classification specifications and analyzed, documented, and validated the same for distinguishing characteristics, position definition and purpose, knowledge, skills, abilities, essential job functions, minimum qualifications, education and experience relevance and hierarchal consistency, conformity with ADA language relative to essential job functions (including physical and intellectual requirements), working/environmental conditions, supervision received and exercised, standby/call back responsibilities, and special requirements including licensing, regulatory, and certification requirements.

Evergreen conducted on-site interviews with employees, as well as appropriate supervisor and management personnel, to verify/clarify information received in the questionnaires and to ensure information regarding organizational structure, supervision, essential job duties, and working environment was accurately captured and reflected in the descriptions that were developed. Evergreen recommended updates proposed a new system utilizing a standardized rating system that analyzed each position against multiple evaluation criteria.

Evergreen also conducted a market salary and benefits survey of public sector organizations comparable to the County in size, population, economic climate, proximity to major cities, etc. The market survey included the hours worked per week by employees in each position in those comparable communities—in an effort to consider both internal and external equity—and was used to compare base annual salary for each position included in the study by minimum, midpoint, and maximum.



Utilizing the market survey results, comparable job descriptions, and other data collected, Evergreen prepared a recommended compensation plan design and salary schedule to correspond to the classification plan and customized to reflect the County's pay progression policy and compensation philosophy. Evergreen recommended the vertical salary relationship and/or differentials between classes in each class series. In the end, Evergreen provided KCLC with a final report that included specific, itemized recommendations, including a discussion of the methods, techniques, and data used to develop the classification and compensation plan and benefits program.



Salary Plan Review City of Suffolk, Virginia

Evergreen Solutions was retained in 2015 by the City of Suffolk to review the Compensation and Classification Study Final Report completed in 2009 by another firm. The goal of this review was to assess the applicability of recommendations since the study's completion, with an emphasis on reviewing: Phase 3 recommendations and applicability given time since completion of study; salaries of employees included in the 2009 study and those not included in the 2009 study (~300 employees hired after study completion) to assess internal equity; title changes recommended; and the City's Compensation Philosophy. In the end, Evergreen provided a final report that included: a comparison of current market compensation data (obtained primarily from TechNet database) to City compensation data; recommendation for placement of all employee salaries for both employees included and not included in the 2009 study; a recommended pay plan/salary schedule; and a recommendation to address compression caused by Phase in approach across all employee groups, including police and fire.

Note: Evergreen Solutions was previously hired by the City of Suffolk to conduct a Compensation and Classification Study. Evergreen consultants assessed both internal and external equity of the City's compensation and classification plan, and provided recommendations for a new plan to cover the City's approximate 1,000 employees.



Pay and Classification Study City of Williamsburg, Virginia

Evergreen Solutions was retained by the City of Williamsburg to conduct a Pay and Classification Study. Employees participated in focus groups, interviews, and a job analysis was conducted to determine the best classifications for the work performed. In addition, pay ranges were analyzed in the marketplace to determine the appropriate pay levels for all jobs. Recommendations were provided to improve the fairness and equity in the current classification and compensation system.



Classification and Compensation Study City of Fredericksburg, Virginia

Evergreen Solutions was engaged with the City of Fredericksburg to conduct a Classification and Compensation Study. Evergreen conducted a full job analysis of City positions and revised, if necessary, existing job descriptions based upon the findings of the job analysis. Evergreen also surveyed the local labor market to ensure that the City's overall package of compensation and benefits was competitive and evaluated whether the City's current human resources policies were affecting the City's ability to compete in the labor marketplace.

Evergreen assisted the City in updating its current classification and compensation plan and developing a strategy to increase employees' pay to a competitive level that aligned with the results of the study. Evergreen provided recommendations to the overall classification and compensation plan that provided internal equity and that was competitive in the marketplace to attract and retain qualified employees.



Classification and Compensation Study County of Culpeper, Virginia

Culpeper County retained Evergreen Solutions to assist with a comprehensive classification and compensation study of all its employees. The study involved conducting a job analysis through desk audits, interviews, and focus groups. A more detailed analysis was performed on clerical and law enforcement staff. A salary and benefits survey was also issued to peers to assess the County's current market position. Recommendations were made for all employees to address job and compensation changes.



Classification and Compensation Study Gloucester County, Virginia

Evergreen Solutions was retained by Gloucester County to conduct a detailed compensation and classification analysis of its non-faculty employees. Employees participated in focus groups, interviews, and job analysis to determine the best classifications for the work performed. Pay ranges were analyzed in the public and private sector to determine the appropriate pay levels for all included jobs. Recommendations were provided to improve the fairness and equity.



Compensation Study (Salary and Benefits) Louisa County, Virginia

Evergreen Solutions was retained by the Louisa County to conduct a Compensation Study. Evergreen's consultants reviewed the effectiveness of the County's current pay plan as it related to the market competitiveness for attracting and retaining quality employees. Pay ranges as well as benefits were analyzed in the public and private sector to determine the appropriate pay levels for all included jobs. Recommendations were provided to improve the fairness and equity in the current compensation system.



Classification and Compensation Study Essex County, Virginia

Evergreen Solutions was hired by Essex County to conduct a Classification and Compensation Study that will allow the County to be competitive in the marketplace in attracting and retaining qualified employees. Evergreen's consultants will perform the following: survey each unique job class to determine a definition of the job class, essential functions, education requirements, experience, knowledge, skills, and abilities, and review and update existing job descriptions, as needed; review the County's current pay practices including overtime pay, awarding compensatory time, half-time pay for emergency services, and all other pay for public safety; prepare a cost analysis for employees in positions that fall below the proposed minimum salaries following reclassification; and recommend appropriate salary range for each existing or proposed position based on the classification plan, the compensation survey results, and internal relationships and equity.



Classification and Compensation Study (Phase I) Loudoun County, Virginia

Evergreen Solutions was engaged with Loudoun County to conduct a Classification and Compensation Study. Evergreen conducted a comprehensive review and evaluation of the County's compensation philosophy and competitive market and made recommendations to retain, modify and/or change the compensation philosophy and/or competitive market. Evergreen also conducted a comprehensive review and evaluation of policies governing the County's total compensation program (pay and benefits offerings) and classification system; benchmarked the elements of the County's total compensation and classification program against its current competitive market and other potential competitor jurisdictions; and made recommendations to retain, modify and/or change elements of the total compensation and classification program.



Evergreen further conducted a comprehensive review and an evaluation of the County's performance plan system; benchmarked the County's system against the job description systems of its competitive market and other potential competitor jurisdictions; and made recommendations to retain, modify, or change the current system. In the end, Evergreen provided comprehensive recommendations for modifying classification and compensation policies and procedures.



Classification and Compensation Study (Phase II) Loudoun County, Virginia

Evergreen Solutions was again hired by Loudoun County to conduct a Classification and Compensation Study (Phase II). Evergreen accomplished the objectives of the Phase II of the study by performing the following tasks:

- developed recommendations on a strategy to implement and administered a compensation philosophy range of 95 percent to 105 percent of the comparator market.
- conducted a comprehensive benchmark market analysis of all County jobs.
- developed a new market competitive pay plan that included an open range pay plan for the general workforce and a "grade and step" pay plan for Public Safety positions.
- provided recommendations for any additional pay incentives and supplements that would assist in maintaining competitive pay as described in Loudoun's compensation philosophy.
- developed a new comprehensive classification system that allowed for more levels and specificity within and across each job group, to and included the development of standardized job descriptions.
- obtained an analysis of pay compression within the County and provided recommendations for addressing pay compression once a new pay plan was implemented; and
- developed recommendations for revisions to the Board approved classification and compensation policies found in Chapter 5 of the Human Resources Handbook.



Classification and Compensation Study Chesterfield County, Virginia

Evergreen Solutions was on contract with Chesterfield County to conduct a Classification and Compensation Study and Pay Plan Development for Public Safety. The study included an examination of the County's classification and compensation system in order to make recommendations for compensation policies, practices, and procedures; and develop a Public Safety Pay Plan. Evergreen worked with the County to develop a comprehensive plan for County employees based upon an objective analysis and thorough evaluation of job content and internal equity. Evergreen reviewed current job descriptions, salary relationships, classifications, and grade methodology. Based on this review and a compression analysis, Evergreen recommended pay and classification strategies for the County. Evergreen also identified and recommended pay incentives and supplements for employees; and policies and procedures to administer the new Public Safety Pay Plan.



Compression Analysis City of Raleigh, North Carolina

City of Raleigh retained Evergreen Solutions to analyze compression in its fire and police pay plans and recommend conversion options for open range pay plans. The study included a comprehensive review of employee placement, promotional practices, and systematic inequities. Evergreen Solutions recommended several alternatives for improving current pay differentials and managing City pay practices in the future.



Compensation and Classification Study City of Goldsboro, North Carolina

Evergreen Solutions was engaged with the City of Goldsboro to conduct a Compensation and Classification Study. Evergreen's consultants evaluated the current compensation and classification systems for the City; conducted a market survey of comparable peer organizations; developed a Final Report that outlined the methodology used to conduct the compensation and classification study, documented the results of the study, including all market research; and developed recommendations for the administration of the new or updated compensation and classification systems.



Pay and Classification Study Buncombe County, North Carolina

Evergreen Solutions was retained by Buncombe County to conduct a Pay and Classification Study. Evergreen Solutions conducted a classification analysis using Evergreen Solutions' Job Assessment Tool job evaluation methodology in addition to a statistical assessment of current conditions. Evergreen Solutions also analyzed local market and benefits data taken from peer organizations to determine the appropriate compensation levels for benchmark positions. Recommendations for adjustments to the compensation and classifications plan were made and procedures for the continued maintenance of the plans were provided.



Compensation and Classification Study Union County, North Carolina

Evergreen Solutions was retained by Union County to conduct a Compensation and Classification Study. Evergreen Solutions performed the following tasks:

- conducted a comprehensive evaluation of every classification within the County to determine relative worth within the organization (internal equity), placement in the organizational pay plan and for the establishment of pay bands;
- established appropriate benchmarking standards and included should be a comparison and analysis of salaries and wages of like or similar jobs (external equity) in comparable government and private employers in North Carolina, South Carolina and Virginia for which the County competed for a labor supply;
- created class/position descriptions that included required knowledge, skills and abilities (KSA) for each position class in a standardized format. The analysis produced a sampling that produced statistical reliability and valid results;
- recommended needed changes to the existing compensation & classification plan to alleviate salary compression issues;
- provided a multi-year implementation plan to adjust compensation as identified in analysis;
- provided a synopsis prepared for management review, covering the salient features of the proposal including overall costs and term of work; and
- provided a procedure manual and training for Human Resources employees that enable them to maintain the recommended classification and compensation plan.



Compensation and Classification Study Transylvania County, North Carolina

Evergreen was retained by the Transylvania County to conduct a Compensation and Classification Study. Evergreen evaluated the current compensation and classification plan and identified the classification of existing positions. Evergreen identified appropriate benchmarking standards and conducted a total compensation survey with comparable municipalities and private sector employers, when applicable. Survey data was provided to the County in a usable electronic format for analysis for each position. Evergreen conducted a solution analysis and developed strategic positioning recommendations. Evergreen reviewed the total compensation system, identified potential pay compression and/or inequities (both internally and to the market), and provided recommendations.



Comprehensive Position Classification and Compensation Study Gaston County, North Carolina

Evergreen Solutions was engaged with Gaston County to conduct a Comprehensive Position Classification and Compensation Study for its employees (1,410 full-time, 46 part-time, and 143 temporary). The primary objective of the study was to implement a fair, consistent, competitive, equitable, and legally defensible classification and compensation system that allowed the County to attract, reward and retain qualified individuals. To accomplish this, Evergreen Solutions' consultants performed a comprehensive review of the County's classification and compensation system which included conducting an internal equity analysis of employee salaries.

Evergreen Solutions provided recommendations to create a system that not only aligned with the State of North Carolina's substantially equivalency requirement, but allowed for flexibility so as not to inhibit those departments that were not required to have this alignment.



Classification and Compensation Study and Benefits Survey New Hanover County, North Carolina

Evergreen Solutions was retained by New Hanover County and the New Hanover Alcohol Beverage Control Board to conduct a Classification and Compensation Study for its employees. Evergreen Solutions' consultants conducted an employee classification and compensation study of public and private employers who were providing equitable services and, based on that study and determined if individualized position/job descriptions were needed, and if so, assisted in the development of those descriptions. Evergreen Solutions prepared a comprehensive analysis that identified New Hanover



County's competitive position in the labor market and provided a recommendation for total salaries and benefits, including the total compensation package of insurance and other benefits (including paid leave), and prepared recommendations for compensation policies, including variable incentive pay options, to maintain competitiveness, reward employees, and ensure equity.

Select County and ABC Board members were provided the necessary training and materials so that an understanding of the methodology and how to implement, administer, and maintain the recommended total classification and compensation system could be accomplished.



Salary Equity Study Guilford County, North Carolina

Evergreen Solutions was retained by Guilford County to assess pay equity based on race and gender for all County employees. Evergreen's consultants performed a review of approximately 1,500 plus positions for internal salary equity. This was accomplished by reviewing the incumbent's related education and experience prior to County employment and related experience gained with the County. Evergreen's consultants also reviewed job descriptions, in conjunction with County Staff, to ensure that content and titles were current, accurate and were consistent with FLSA, EEO and ADA considerations. At the conclusion of the study, Evergreen made recommendations by individual position/employee for internal salary equity pay adjustments and provided an analysis that included a statistical treatment of pay placement and progression.



Compensation, Classification, and Benefits Study Haywood County, North Carolina

Evergreen Solutions is retained by Haywood County to conduct a Compensation, Classification and Benefits Study. Evergreen's consultants will review the County's current pay grades and classification information; conduct salary and benefits surveys of the County's peers; make recommendations to update or restructure the County's pay grades and classification system; and provide revised job descriptions for the updated/restructured classification system. **Note:** This project is nearing completion.



Classification System and Pay Plan Development Study Franklin County, North Carolina

Evergreen Solutions was retained by Franklin County to conduct a Classification System and Pay Plan Development Study. The Evergreen Team worked with the County to obtain the current classification system and pay plans. After an initial assessment, Evergreen consultants collected data using the Job Assessment Tool© and conducted market salary and benefits surveys to develop recommendations for strategic positioning, a new job classification, and compensation and position evaluation system based on analyses of the data gathered.



Employee Classification and Compensation Study Blount County, Tennessee

Evergreen Solutions was retained by Blount County to conduct an Employee Classification and Compensation Study for its workforce. Evergreen conducted focus groups and interviews with employees and employees completed a Job Assessment Tool (JAT) that identified work performed. Evergreen presented to the Human Resources Director and Mayor any resultant classifications recommended in the classification study and provided for the maintenance of the new structure, including periodic review, reclassification review procedure and promotion guidelines.

For the compensation study, Evergreen identified survey labor market and benchmark classes to use for a market analysis; conducted a comprehensive compensation search utilizing other similar public sector employers; completed internal salary relationship analysis, including the development of appropriate internal relationship guidelines; developed externally competitive and internally equitable salary recommendations for each class included within the study in order to maintain appropriate competitive position in relation to other employers within the region; and assigned a salary range to each classification which reflected the results of the market survey and the analysis of internal relationships. Evergreen presented survey results to management to make a decision on overall pay philosophy. In the end, Evergreen recommended appropriate premium pay options to supplement the compensation plan. Examples included options for pay for certifications, professional licenses, special skills, temporary “acting” assignment at higher level duties, “on-call” and “callout” pay, pay alternatives for exempt level workers not normally eligible for overtime, and similar pay practices.



Compensation Plan Update Blount County, Tennessee

Evergreen Solutions was again retained by Blount County in late 2017 to conduct a Compensation Plan Update. Evergreen assessed the current conditions of the current pay plan; used County approved targets and benchmarks to conduct a salary survey; provided recommendations for updates/changes to the pay plan to compete with the labor market at a more competitive position (~ 70th percentile); provided recommendations for implementing the new pay structure; provided recommendations for revisions to pay practices as appropriate; provided recommendations for merit pay practice to differentiate salary increases based on employee performance; and prepared and delivered a draft and final report.



Comprehensive Classification and Compensation Study Carter County, Tennessee

Evergreen Solutions is retained by the Carter County Government to conduct a Comprehensive Classification/Compensation Study. Evergreen's consultants will work with County management to develop an employment/wage strategy consistent with the County's employment goals. To accomplish this, consultants will be required to conduct focus groups and interviews with selected employees; review employees completed Job Assessment Tools (JAT). A labor market survey of the County's peers in the County's target employment area will be conducted to assess the County's market competitiveness. Draft and final reports will be provided to the County summarizing the study. Finally, Evergreen's consultants will work with the County's management to update or create accurate job descriptions, as needed.



Salary and Benefits Study City of Bloomington, Indiana

Evergreen Solutions was retained by the City of Bloomington to conduct a Salary and Benefits Study. Evergreen examined the wages and benefits of the City's employees (including transit) as compared to public and private sector entities in Indiana and surrounding areas to determine whether the City's wages and benefits were competitive in the market.



Classification and Compensation Study Services City of Urbana, Illinois

Evergreen Solutions is engaged with the City of Urbana to provide Classification and Compensation Study Services. The City of Urbana seeks to achieve the following goals: 1. Maintain a high level of employee satisfaction by providing a classification and compensation system that is both fair and competitive. 2. Demonstrate fiscal responsibility to the community by providing a classification and compensation system that makes the best of The City's financial resources. 3. Ensure a close alignment between pay and performance by providing a classification and compensation system that rewards merit.



Employee Compensation and Classification Study Mahoning County, Ohio

Evergreen Solutions was retained by Mahoning County to conduct an Employee Compensation and Classification Study for all the County's 1,746 employees. Employees participated in focus groups, interviews, and a job analysis was conducted to determine the best classifications for the work performed. Pay ranges were further analyzed in the public and private sector to determine the appropriate pay levels for all included jobs. Evergreen consultant's also reviewed and updated existing job descriptions and determined FLSA designations for each job title/classification. Evergreen designed an implementation strategy for the compensation system with the lowest financial impact on the County's operating budget and with the greatest gain to positions that fell outside of a designated range. In the end, recommendations were made to improve the fairness and equity in the current system.



Compensation Study County of Montgomery, Pennsylvania

Evergreen Solutions was retained by the County of Montgomery to conduct a Compensation Study. The study included an examination of the County's compensation plan in order to provide recommendations for compensation policies, procedures and practices that provided internal equity and allowed the County to be competitive in the marketplace for attracting and retaining qualified employees. Evergreen recommended and identified a market position for Montgomery County by administering a comprehensive labor market salary survey to select public and private sector peers. Evergreen also conducted a comparative analysis of benefits provided in the market that included PTO, health, dental, vision and prescription, including percentage of contribution between employee and employer, long term disability (LTD), life insurance and pension benefits.



Evergreen then recommended appropriate salary ranges (i.e., min, mid, and max) for all non-represented classifications. Evergreen prepared a cost analysis for the recommended salary ranges.



Classification and Compensation Study and Analysis Town of Bridgewater, Massachusetts

Evergreen Solutions is retained by the Town of Bridgewater to conduct a Classification and Compensation Study and Analysis. The purpose of study is to address changes in Town operations and staffing over the past several years, which may have affected the type, scope, and level of work being performed and to also address Police and Fire compensation that takes into account the various benefits.

The objectives of the study are to:

- Attract and retain qualified employees;
- Ensure positions performing similar work with essentially the same level of complexity, responsibility, authority, and knowledge, skills, and abilities are classified together;
- Provide salaries commensurate with assigned duties;
- Clearly outline promotional opportunities and provide recognizable compensation growth;
- Provide justifiable pay differential between individual classes; and
- Maintain a competitive position with other comparable government entities and private employers within the same general geographic areas.

Note: This project is nearing completion.



Compensation and Pay Classification Plan Study City of Foley, Alabama

Evergreen Solutions was retained by the City of Foley to conduct a Compensation and Pay Classification Plan Study. The objectives of the study were to conduct and implement a total compensation plan (including benefits) structure for the City's workforce which would provide both internal and external equity, establish a classification system that accurately describes the duties, knowledge, skills, abilities and minimum qualifications required for each job class, determine and implement a program of accurate



job descriptions based on job analysis, and develop a maintenance program for job descriptions and classification recommendations.

Evergreen conducted a wage and benefit survey among competing jurisdictions as well as public and private organizations to determine competitive wages in the appropriate labor market(s). Using the survey results, Evergreen assigned each job to a pay grade with a view toward achieving proper internal relationships among classes and making salary ranges competitive with relevant markets with due consideration of the financial condition of the City. Evergreen provided estimates of the cost to install and implement the new pay plan and recommended a methodology for implementation.



Classification and Compensation Study Baldwin County, Alabama

Evergreen Solutions was retained by Baldwin County to conduct a Comprehensive Classification and Compensation Study for its 973 employees. Evergreen consultants conducted a job analysis, evaluated and revised job descriptions, conducted a market salary survey, developed a new pay plan based on the market results and job analysis, and prepared and presented a final report that recommended a new classification and compensation structure for the County.



Classification, Pay, and Benefits Study Lee County Commission, Alabama

Evergreen Solutions was retained by the Lee County Commission to conduct a Classification, Pay and Benefits Study for approximately 436 employees. To begin this study, Evergreen Solutions conducted a comprehensive, preliminary evaluation of the County's current pay scale and existing classification plan. Evergreen used its unique Job Assessment Tool© (JAT) to identify classifications of positions and perform job analyses, including an evaluation of supervisory comments. Follow-up interviews were conducted, as needed, and classification changes recommended.

Benchmarks and targets were identified for a market salary and benefits survey. Survey data and internal equity (with proper consideration of the financial condition of the jurisdiction), was used to determine proper pay scale, identify highly competitive positions within the County, and to make strategic positioning recommendations. Evergreen Solutions completed the study by conducting a solution analysis, developing and administering an employee appeals process, developing and submitting final reports, and recommendations for compensation administration to ensure that staff could conduct audits/adjustments consistent with study methods until the next formal study is conducted.



Compensation and Benefits Study and Analysis City of Dahlonega, Georgia

Evergreen Solutions was engaged with the City of Dahlonega to conduct a comprehensive classification, compensation, and benefit study and analysis of its workforce. Evergreen's consultants evaluated the City's present salary and benefit structure as compared to the relevant job market for comparable positions in both the private and public sectors. Evergreen reviewed all current job descriptions and analyzed the same for knowledge, skills, abilities, education and experience relevance and internal consistency, job definitions and summaries, distinguishing characteristics, supervision received and exercised, conformity with the ADA relative to essential job functions and special requirements, including licensing and certifications. Evergreen also analyzed all existing job family classifications, pay grades and salary ranges, and recommended modifications as necessary as well as analyzed all existing FLSA classifications and recommended modifications, as necessary.



Classification and Compensation Study City of Douglasville, Georgia

Evergreen Solutions was retained by the City of Douglasville to conduct a Classification and Compensation Study and Analysis of its workforce consisting of 225 full-time employees in approximately 96 job titles.

Evergreen performed the following tasks:

- Evaluated the City's present salary structure as compared to the relevant job market for comparable positions in both the private and public sectors.
- Reviewed all current job descriptions and analyzed same for knowledge, skills, abilities, education and experience relevance and internal consistency, job definitions and summaries, distinguishing characteristics, supervision received and exercised, conformity with the ADA relative to essential job functions (including physical demands); and special requirements including licensing and certifications.
- Reviewed the City's current Position Classification and Wage Administration Plans and provided recommendations for enhancement and specific guidelines for requests pertaining to the following: creating new positions, salary adjustments and reclassifications, retroactive pay, compensation for additional duties (temporary and permanent assignments) and internal equity adjustments.



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- Analyzed all existing job family classifications, pay grades and salary ranges and recommended modifications as necessary.
 - Analyzed all existing FLSA classifications and recommended modifications as necessary.
 - Identified potential pay compression issues and provided alternative solutions.



Compensation Analysis City of Alpharetta, Georgia

Evergreen Solutions was engaged with the City of Alpharetta to conduct a competitive compensation analysis. The purpose and intent of the study was to compare and contrast the City's current wage and benefit structure and levels with those of key competing employers—both public and private. The analysis was based upon job descriptions and/or duties performed rather than upon job titles in order to ensure accurate comparisons and to consider all aspects of the City's compensation package. At the time of the study, the City of Alpharetta employed 414 full-time and five part-time positions, excluding senior management and elected officials, defined across 132 position descriptions. The base salary ranges for these positions were divided among eight pay grades.

The primary goals of this project were to: determine the City's competitive position within the marketplace in terms of its overall compensation package; determine the relative value and competitive positioning of each compensation/benefit area; and identify any weaknesses within the components of the City's existing compensation package that may negatively impact the organization's ability to attract and retain talented employees.



Employee Classification and Compensation Study City of Savannah, Georgia

Evergreen was engaged with the City of Savannah to conduct an Employee Classification and Compensation Study for its workforce of 2,500 employees. Evergreen developed a comprehensive job classification system that accommodated the City's need for a flexible, internally and externally equitable, defensible, market sensitive and easily administered system for all current and future jobs within the City. Evergreen established career paths for occupations, provide clear distinctions in different job levels, established performance standards/job qualifications for all newly created job classifications, produced job descriptions that were legally defensible and are in accordance with ADA and FLSA, assigned classifications to pay ranges designed by the City that were labor market appropriate, and trained Human



Resource staff so that they could maintain, enhance, and use the classification system to identify and consistently apply the system to modify an existing position or classification or create a new position or classification scheme.

Evergreen further assisted the City in formulating a formal compensation philosophy and developing a compensation system for all job classifications based upon the adopted compensation philosophy. Evergreen identified comparable benchmark employers to guide the City's future employee salary and benefit decisions in order to facilitate the retention and attraction of high performing staff members, while being financially sustainable.



Comprehensive Classification and Compensation Study City of Garden City, Georgia

Evergreen Solutions was retained by the City of Garden City to conduct a Comprehensive Classification and Compensation Study for its workforce. The primary objectives of the Classification and Compensation Study were to: attract and retain qualified workers who would be paid equitable salaries; provide fair salaries for all workers of the City; and provide a salary structure that enabled the City to maintain a competitive position with other cities and companies within the same geographic area. To accomplish this, Evergreen: worked with the City's management staff to identify a market position for the City; developed a comprehensive labor market salary survey for the Chatham County area and surrounding municipalities that reflected both cities and private industry; analyzed existing internal hierarchy based on job relationships, identified problem areas within the internal hierarchy system, and proposed implementation methods to correct identified problems; reviewed current classification grade methodology, and proposed recommended strategies for the City of Garden City; and developed a pay plan identifying specific parameters (i.e., percent spreads between ranges and within ranges). In the end, Evergreen prepared a cost analysis for positions that fell below the proposed minimum salaries following reclassification and developed recommendations and an instrument for the ongoing internal administration and maintenance of the proposed classification/compensation plan.



Comprehensive Classification and Compensation Study City of Tybee Island, Georgia

Evergreen Solutions was retained by the City of Tybee Island to conduct a Comprehensive Compensation and Classification Study. Evergreen's consultants reviewed the City's current compensation plan (salary grade levels and steps) to understand the current challenges of recruiting and retaining employees and identified and recommended a consistent and competitive



market position that the City could strive to maintain based on a salary survey of both private and public sector peer organizations. In the end, Evergreen recommended an appropriate salary range for each position in the City based on a review and analysis of the classification plan, the compensation survey results, internal relationships, and external and internal equity.

Evergreen prepared a new salary structure based on results of the salary survey and best practices and developed guidelines to assist the City staff with determining the starting pay for new employees based on knowledge and experience above minimum requirements of the position, how difficult the position is to fill, and market competitiveness. Evergreen further provided recommendations for the ongoing internal administration and maintenance of the proposed compensation and classification plan.



Salary and Benefits Survey City of Roswell, Georgia

Evergreen Solutions was retained by the City of Roswell to conduct a Salary and Benefits Survey. Evergreen examined wages and benefits of the City's employees as compared to public and private sector entities in Georgia and surrounding areas to determine whether the City's wages and benefits were competitive in the market.



Compensation Study City of Statesboro, Georgia

Evergreen Solutions was engaged with the City of Statesboro to review and update the City's Classification and Compensation Plan for its 300 employees. The primary goals of this project was to: ensure job descriptions accurately reflect work performed; identify career ladders/promotional opportunities for each classification; determine the City's competitive position within the marketplace; and identify any weaknesses within the components of the City's existing compensation plan that may negatively impact the organization's ability to attract and retain talented employees. Evergreen recommended appropriate salary ranges for existing or proposed positions based on the classification study and the compensation survey results.



Classification and Compensation Plan Development City of Brookhaven, Georgia

Evergreen Solutions was engaged with the City of Brookhaven to develop a Classification and Compensation Plan. The primary goals of this project was to: ensure job descriptions accurately reflect work performed; identify career ladders/promotional opportunities for each classification; determine the City's competitive position within the marketplace; determine the relative value and competitive positioning of each compensation area; and identify any weaknesses within the components of the City's existing compensation plan that may negatively impact the organization's ability to attract and retain talented employees. Evergreen recommended appropriate salary ranges for existing or proposed positions based on the classification study and the compensation survey results. Evergreen also recommended a performance management and evaluation program, including a comprehensive evaluation form and rating system for fiscal year 2016 implementation. The evaluation plan included a performance based component.



Compensation and Benefits Study Forsyth County, Georgia

Evergreen Solutions was engaged with Forsyth County to conduct a Compensation and Benefits Survey for the various departments/offices of the County. The objective of the survey was to provide Forsyth County Government a competitive position with other comparable government entities and private employers within the same geographic area to attract and retain qualified employees. Evergreen's consultants reviewed the current compensation plan and salary grade levels to understand the current challenges facing the County in recruiting and retaining employees. Evergreen surveyed comparable labor markets competing with the County for labor in the greater metro Atlanta labor market and comparable public organizations. The survey was designed to capture not only base salary information but comprehensive benefits information (inclusive of: deferred compensation; leave plans; employer paid medical, dental, vision, disability insurance, life insurance) to ensure that the County was competitive with other public organizations in the greater metro Atlanta labor market in its total compensation package.

In the end, Evergreen prepared a final report of findings with written recommendations regarding specific classifications, salary market adjustments, and preferred benefit package and recommended any necessary salary range changes for the County's job classifications.



Classification and Compensation Study and Analysis Douglas County, Georgia

Evergreen Solutions was engaged with Douglas County to conduct a Classification and Compensation Study and Analysis. Evergreen evaluated the County's present salary structure as compared to the relevant job market for comparable positions in both the private and public sectors. Evergreen performed the following tasks:

- reviewed all current job descriptions and analyze same for knowledge, skills, abilities, education and experience relevance and internal consistency, job definitions & summaries, distinguishing characteristics, supervision received and exercised, conformity with the ADA relative to essential job functions (including physical demands); special requirements including licensing and certifications;
- reviewed the County's current Position Classification and Wage Administration Plans and provided recommendations for enhancement and specific guidelines for requests pertaining to the following: creating new positions, salary adjustments and reclassifications, retroactive pay, compensation for additional duties (temporary and permanent assignments) and internal equity adjustments;
- analyzed all existing job family classifications, pay grades and salary ranges and recommend modifications as necessary;
- analyzed all existing FLSA classifications and recommended modifications as necessary;
- established appropriate benchmarking standards and conducted salary surveys as needed for similar positions with comparable Georgia counties as required;
- identified potential pay compression issues and provided alternative solutions; and
- develop applicable classification/reclassification questionnaire.



Classification and Compensation Study Lumpkin County, Georgia

Evergreen Solutions was engaged with Lumpkin County to conduct a comprehensive classification and compensation study of its workforce which assisted the County in updating its current classification plan, revising salary administration guidelines, and developing a strategy to increase employees' pay to a competitive level that would align with the results of the study.



Evergreen provided recommendations to the overall classification, compensation, and performance plan that provided internal equity and would be competitive in the marketplace to attract and retain qualified employees. Evergreen provided options on ways to keep the pay structure current in future years in order to avoid compression and provided the necessary training for the implementation of the new salary schedules and plans. Evergreen provided the County with multiple pay scales for both part- and fulltime employees, including pay scales for employees of the Sheriff's Office and Emergency Services.



Compensation Study City of Orlando, Florida

Evergreen was retained by the City of Orlando to provide human resources consulting services by conducting a compensation study. Evergreen reviewed the City's compensation system, selected targets and benchmarks for market comparison, conducted a market survey, and developed strategic positioning recommendations to keep the City's compensation plan competitive.



Salary Survey Update City of Orlando, Florida

Evergreen was retained again by the City of Orlando to conduct a Salary Survey Update for fire positions. Evergreen used the same targets and positions used for the original salary survey conducted in 2016 and collected the following additional information:

- Do they provide a supplement for paramedic or EMT?
- Is an EMT a minimum requirement for firefighters?
- What is their hourly schedule?
- Do they have a step plan?
- Do they move a step and the plan min and max each year?
- What do they do when a fire staff member is maxed out?



Compensation Consulting City of Orlando, Florida

Evergreen was again retained by the City of Orlando to provide compensation consulting services. Evergreen analyzed the current labor market trends in the Orlando metro area, including the pay increases being offered by Disney between now and 2020; collected information from public entities in the Orlando metro area regarding how they were responding to turnover and



talent shortages; examined best practices on implementing wage floors to address local market changes; proposed several alternatives to the City to address local market changes, especially those related to the increase in the minimum wage to \$15 per hour by some private organizations; worked with the City HR staff to model and cost different implementation scenarios; and provided a short summary of the analysis and recommendations.



**Job Classification and Compensation Study
City of Melbourne, Florida**

Evergreen Solutions was retained by the City of Melbourne to conduct a Job Classification and Compensation Study. Evergreen reviewed the City's salary and benefit structure and assist in updating information on essential job functions, responsibilities, required knowledge, skills and abilities, and physical demands of each position. Evergreen examined all job descriptions to include a review of position FLSA designations; essential functions; minimum qualifications, license requirements, working conditions, etc., provided recommended updates and/or changes, established criterion for the selection of survey participants with City staff members, prepared a survey to send to the participants, and prepared recommendations based on the results.

Evergreen addressed compression/equity issues between pay grades and classifications and established an equitable classification methodology and salary ranges to provide for the recruitment and retention of qualified staff as well as the equitable relationships of one job to another within the organization. Recommendations were provided to classify/reclassify positions as appropriate. In addition, a recommendation was made for a new compensation plan that is fair and equitable in order to attract, motivate, and retain a quality workforce. Evergreen provided three (3) separate proposed pay plan structures based on salary scales that are 90%, 100% and 110% of the surveyed labor market.



**Compensation Study
City of Hollywood, Florida**

The City Hollywood retained Evergreen to conduct a compensation study of all non-represented employees (Executive; Managerial; Legal; Technical; and Confidential Administrative Support). A job-task analysis/job audit was conducted to determine whether classifications were correctly placed in the organizational hierarchy and whether individual job positions were classified correctly. Evergreen reviewed job descriptions using the Job Assessment Tool job valuation methodology and conducted a statistical assessment of current conditions to ensure compliance with federal and state laws including proper designation of classifications as "exempt" vs. "non-exempt".



Evergreen conducted a comprehensive survey to ensure that the City of Hollywood's compensation plan was equitable and competitive in its total compensation package relative to internal factors and external markets (The City's goal was to be in the top 25% in salary). Evergreen's consultants reviewed existing salaries to determine proper placement within proposed classifications, and recommend appropriate "equity adjustments" as needed, based upon the results of the salary survey and the recommended pay plan.

Evergreen concluded the study with recommendations designed to alleviate any strains on the current compensation and classification system. Evergreen further recommended procedures, policies, and methods to maintain an on-going Classification & Compensations Plan that was performance based, fair and competitive. In addition, Evergreen's consultants developed policies and procedures for developing and maintaining a career track/progression/retention program and reviewed existing performance appraisal system in order to make recommendations to integrate the performance appraisal system with new Classification & Compensation Plan. **Note:** At the conclusion of the study Evergreen was hired again to conduct a compensation study of all AFSCME employees (i.e., Professional and Supervisory employees).



Compensation, Classification, and Performance Management Study - Manatee County, Florida

Evergreen Solutions was hired by Manatee County to assist with a county-wide Compensation and Classification Study. At the time of the study, Manatee County was a growing county with a population of over 300,000 located on the southwestern coast of FL between Pinellas and Sarasota Counties. An appointed County Administrator oversaw 16 departments, with approximately 2,900 employees within approximately 600 classifications and 58 pay ranges/grades.

The study included all employees that serve in capacities for the Board of County Commissioners. As part of the review, orientation sessions, focus groups, and interviews were conducted in throughout the county. All employees were asked to complete the Job Assessment Tool (JAT) and job analysis was conducted with the results in order to create a classification plan. A salary survey was issued to local and regional employers to assess competitiveness. Based on the classification and compensation findings, a new pay plan as well as policies and procedures were recommended to the County. Evergreen Solutions helped the County attain their goal of maintaining a sound process providing a classification and pay structure that is fair, equitable, and systematic with a compensation plan comparable with other governmental jurisdictions and the private sector. In addition, Evergreen reviewed the performance management system in place within the County, and provided recommendations for improvement.



Compensation and Classification Study Services Monroe County, Florida

Evergreen was retained by Monroe County to conduct a Compensation and Classification Study for 265 non-union employees in 178 classifications as well as 124 union employees in 46 classifications who are represented by the Teamsters bargaining unit. Employees participated in focus groups, interviews, and a job analysis to determine the best classifications for the work performed. Evergreen's consultants compared the County's positions to other similar positions within other County departments to determine the relative value of each position to every other position in the County. Comparisons were made with regard to the actual work being performed and based on the current job description. In addition, positions were compared to other similar positions in other private and public sector organizations throughout the Florida Keys and South Florida. Characteristics such as size of the organization, geographic proximity, economic and budget characteristics, and other appropriate demographic data were taken into consideration when making comparisons. Evergreen's consultants also analyzed pay ranges in the public and private sector to determine the appropriate pay and benefit levels for all included jobs.

Recommendations were provided to improve fairness and equity of all jobs within the County. Select County staff were provided the necessary training and materials so that an understanding of the methodology and how to implement, administer, and maintain the recommended total classification and compensation system could be accomplished.

Note: Evergreen was again retained in 2018 to conduct an update of the County's Classification and Compensation Plan to include fire and rescue.



Classification and Compensation Study Alachua County, Florida

Evergreen Solutions was engaged with Alachua County to conduct a Compensation and Classification Study of jobs under the Board of County Commissioners, the Sheriff, Tax Collector, Property Appraiser, Supervisor of Elections, and the Library District. Specifically, the County desired the following services to be performed by Evergreen:

- develop and administer a job analysis questionnaire for the purpose of having employees state their job duties and qualifications including education, experience, licenses and certificates; working conditions (physical and environmental) and all other pertinent information;
- prepare and present to the Board of County Commissioners a report documenting the results of the job analysis by classification and recommendations concerning a classification structure and pay adjustments;



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- allocate each employee with regard to the new classification structure;
 - identify benchmark classifications to be used to determine appropriate markets for salary survey purposes, as well as to determine the position of the county with regard to salaries for comparable jobs in appropriate markets;
 - administer a salary survey for the purpose of recommending appropriate salaries based on external (market) and internal (equity) considerations;
 - recommend a salary structure, including the number of pay grades, and pay ranges;
 - recommend salaries for each classification, as well as recommended salaries for each employee;
 - provide a classification maintenance plan;
 - provide guidelines and procedures for administering the resulting classification plan to include the following: Initial placement in the salary range and means for movement through the range; and
 - train HR and departmental staff on the methodology and maintenance of the recommended classification and pay plan.



Classification and Compensation Study Palm Beach County, Florida

Evergreen Solutions was retained by Palm Beach County to conduct a Classification and Compensation Study in order to update the current classification and compensation structure. Evergreen performed the following tasks:

- conducted a job analysis across the County to ensure job descriptions matched the duties performed by the employee;
- provided an analysis of all positions— assigning an appropriate salary grade to ensure fairness and equity—and included recommendations for all positions that were found to be above or below the assigned salary grade; and
- conducted a market compensation analysis of salaries and wages of like or similar jobs of comparable Florida public organizations with similar position and organizational characteristics.



Classification and Compensation Study Pinellas County, Florida

Evergreen Solutions was retained by Pinellas County to conduct a comprehensive classification and compensation study that included recommendations and suggestions for an implementation and maintenance process that effectively provided the County with the resources and expertise to further enhance its classification and compensation program. A comprehensive job classification and pay study hadn't been conducted since 2004 so the County believed it was important to invest in a study that would look at both internal and external equity.

The objective of the study was to have a credible classification and compensation plan that: allowed positions performing similar work with similar levels of complexity, responsibility, and knowledge, skills and abilities to be classified appropriately; identified salaries for assigned duties; outlined promotional opportunities and possible compensation growth; identified pay differential between individual classifications; and identified relevant labor markets.



Classification and Compensation Study Sedgwick County, Kansas

Evergreen Solutions was retained by Sedgwick County to conduct classification and compensation study for approximately 2,766 employees. Employees participated in focus groups, interviews, and job analysis to determine the best classifications for the work performed. Classifications were reviewed, as needed, and FLSA determinations were made. Evergreen consultants reviewed pay policies and practices and pay ranges in the public and private sector were analyzed to determine the appropriate pay levels for all included jobs.

Recommendations were provided to improve the fairness and equity within the County and a plan was provided to address maintenance of implemented changes to the County's classification and compensation system. In addition, Evergreen provided County staff with the necessary training and materials so that an understanding of the methodology and how to implement, administer, and maintain the recommended total classification and compensation system would be accomplished.



Classification and Compensation Study and Analysis City of Broken Arrow, Oklahoma

Evergreen Solutions was retained by the City of Broken Arrow to conduct a Classification and Compensation Study and Analysis to evaluate the present salary structure as compared to the specific job market for comparable positions in the public sectors. Evergreen performed the following: reviewed all current job classifications, confirmed and recommended changes to hierarchical order of jobs using The City's evaluation system; established appropriate benchmarking standards and conducted salary surveys as needed for similar positions as required (prefer to assess duplicate benchmarks – both municipalities as well as local employers); identified potential pay compression issues and provided potential solutions; analyzed and recommended changes to the present compensation matrix and/or structure to meet the market analysis; and assessed potential impact of pending DOL changes.



Comprehensive Classification and Compensation Study City of Branson, Missouri

The City of Branson hired Evergreen Solutions to conduct a Comprehensive Compensation and Classification Study to determine whether the City possessed a compensation and classification system that was both equitable as compared to the external competitive employment market as well as equitable internally. The study included a complete classification analysis using the Job Assessment Tool job valuation methodology as well as a statistical assessment of internal conditions and an assessment of external equity including a salary survey of competing organizations. The report culminated with a series of findings and recommendations that were designed to alleviate any strains on the system and, if necessary, redesign or augment the existing system in place at the City of Branson.



Compensation Study City of Lee's Summit, Missouri

The City of Lee's Summit retained Evergreen Solutions to conduct a Compensation Study to determine whether the City possessed a compensation and classification system that was equitable as compared to both the external competitive employment market as well as being internally equitable. The study included a complete classification analysis using the Job Assessment Tool and Management Issues Tool job valuation methodology as well as a statistical assessment of internal conditions and an assessment of external equity including both benefits and salary surveys of competing organizations.



The report culminated with a series of findings and recommendations that were designed to alleviate any strains on the system and, if necessary, redesign or augment the existing systems in place at the City of Lee's Summit. Also included in this study was an evaluation of the City's performance evaluation system to include recommendations for improvement, revision of evaluation instruments and development of a brief training manual for the program.



Classification and Compensation Study Jackson County, Missouri

Evergreen was retained by Jackson County to conduct a classification and compensation study. Evergreen performed a job and analysis to ensure employee's duties and responsibilities were accurate. Evergreen updated job descriptions and reviewed the County's compensation structure, and provided recommendations to optimize the attraction and retention of employees. Evergreen prepared a report with findings and recommendations.



Comprehensive Compensation and Classification Study Jefferson County, Missouri

Jefferson County retained Evergreen Solutions to conduct a Comprehensive Compensation and Classification Study to analyze the County's market competitiveness and internal equity. Located just 40 miles southwest of the City of St. Louis, the County possessed a unique set of challenges being on the border of more rural, suburban, and even metropolitan markets. Maintaining market competitive compensation and classification plans in these environments required special effort. With this in mind, this study included a comprehensive classification analysis using the Job Assessment Tool job valuation methodology in addition to a statistical assessment of current conditions. An assessment of external equity including a salary survey of competing organizations was conducted. The project concluded with a series of findings and recommendations that were designed to alleviate any strains on the system and, if necessary, redesign the existing system in place for the County.



Classification and Compensation Study St. Charles County, Missouri

Evergreen Solutions was engaged with the St. Charles County Government to conduct a Classification and Compensation Study. The primary purpose of the study was to assist the County in the evaluation of its overall employee compensation and pay structure as compared to the market; to perform a job audit and analysis for each full-time position to determine appropriate classification; and to update/develop job descriptions in a standardized format that is ADA and FLSA compliant.

At the conclusion of the study, Evergreen provided a recommended job evaluation plan that will allow the County to evaluate positions every two years as well as provided an administration manual with plan maintenance procedures and a summary document that could be used to communicate the compensation system change to current and future employees.



Classification, Compensation, and Benefits Study Ogden City Corporation, Utah

Evergreen Solutions was engaged with Ogden City Corporation to conduct a Classification, Compensation and Benefits Study. The goals of this study were to ensure that job descriptions accurately reflected actual duties and maintained compensation levels that were both internally and externally equitable.

Evergreen Solutions worked with Ogden City Corporation throughout four project phases that involved:

- conducting a job analysis, including building a classification plan;
- documenting a compensation philosophy;
- reviewing and analyzing the City's total compensation plan, including a market salary and benefits survey; and
- providing a comprehensive report containing recommendations, an implementation approach, and guidelines for maintaining classification and compensation policy updates and changes.



Pay for Performance Study and Salary Survey City of Manitou Springs, Colorado

Evergreen Solutions was retained by the City of Manitou Springs to develop a performance-based pay structure and conduct a salary survey. Evergreen made recommendations regarding enhancements needed to the City's current performance evaluation system and provided the City with a performance evaluation tool.



Classification and Compensation Study Ouray County, Colorado

Evergreen Solutions was engaged with Ouray County to conduct a Classification and Compensation study, including wages and benefits, for full-time and part-time employees of Ouray County. A job analysis was conducted using existing job descriptions to determine the best classifications for the work performed. Evergreen recommended the deletion of outdated or unnecessary jobs descriptions as well as the revision to current positions, if needed. In addition, a salary survey was conducted to ensure external market equity by comparing Ouray County to other county governments, local municipalities and local businesses as appropriate. Recommendations were provided to improve the fairness and equity in the current classification and compensation system.



Classification and Compensation Study City of Seguin, Texas

Evergreen Solutions was hired to assist the City of Seguin in designing and implementing a comprehensive classification and compensation plan for its workforce of 330 full-time employees. The scope of the project included two major components: (1) Working with a City management team to revise the existing pay plan and structures; and (2) Evaluating current salary structure and compensation levels for all regular, classified positions and recommending appropriate adjustments.

Specifically, Evergreen's consultants reviewed the City's current classification/compensation plan; surveyed management and identified problem areas regarding the classification and compensation system; conducted a salary survey to ensure external equity; reviewed current policies and procedures; reviewed salary structure to determine appropriateness; and provided technical assistance and training to City staff to facilitate the implementation and the maintenance of the recommended system and procedures.



Comprehensive Compensation and Benefits Study City of Sachse, Texas

Evergreen Solutions was hired by the City of Sachse to conduct a Comprehensive Compensation and Benefits Study. The study measured and provided an analysis on base salary, pay/step plans, employer-provided medical benefits packages and any other incentive-based compensation options, including “on call” pay. To ensure the project’s validity and applicability, Evergreen conducted a compensation analysis using similar-sized local municipalities for comparison and recommended comparator cities for consideration.

The following study components were compared:

- pay ranges with comparator cities performing the same or similar functions;
- actual employee pay with comparator cities performing the same or similar functions;
- pay/step plans/special assignment pay with comparator cities performing the same or similar functions; and
- city-provided comprehensive employee benefits packages with comparator cities performing the same or similar functions.

Evergreen recommended pay structure features that provided opportunities for advancement while minimizing salary overlap between levels of responsibility.



Classification and Compensation Study City of Pflugerville, Texas

Evergreen Solutions was hired by the City of Pflugerville to conduct a Classification and Compensation Study for its workforce of over 300 full- and part-time employees. Evergreen analyzed each position within the City by conducting interviews and job audits; evaluated employee position descriptions and duties; interviewed department heads and managers; and assessed classifications within positions (I, II, III, or Lead, Foreman).

Evergreen reviewed current job descriptions, focusing on the purpose, job scope, essential duties and responsibilities, education/training requirements, physical job requirements, and working conditions, determined FLSA status (exempt/non-exempt) for positions under federal regulations, and recommended which positions were essential positions in the event the City had a temporary closure. Based on this review, Evergreen presented a proposed classification structure to City management and incorporated input into the final classification document, including a cost



analysis for positions that would require adjustments.

Evergreen surveyed the cities of Georgetown, Round Rock, Hutto, Cedar Park, Leander, San Marcos, and College Station to compare compensation and benefit structures in addition to minimum and maximum rates of pay for select positions and will soon make recommendations toward appropriate ranges for rates of pay for each position identified. This included a minimum, mid-point, and maximum, with 1st and 3rd quartile designations. A Salary Grade Chart was prepared based on these recommendations and was presented to management for final approval.



Comprehensive Compensation and Benefits Study City of Rowlett, Texas

Evergreen Solutions was engaged with the City of Rowlett to conduct a comprehensive compensation and benefits study. The primary goal of the study was to ensure that the City was recognized as an employer of choice that provides a viable, cost effective and competitive pay structure. The study measured and provided a compensation analysis on (a) base salary, (b) pay/step plans, (c) employer-provided medical benefits packages and (d) any other incentive-based compensation options, to include “on call” pay. Evergreen’s consultants identified any weaknesses within the components of the City’s existing compensation package that would negatively impact the organization’s ability to attract and retain talented employees.



Pay Structure Study City of Fate, Texas

Evergreen was hired to develop a new pay plan for the City of Fate. Evergreen performed the following tasks: reviewed the City’s salary data; created a new pay plan for the City; slotted current jobs into the new pay plan; and verified the internal equity of the new pay plan.



Job Classification, Salary Survey, Compensation Plan Study Services City of Duncanville, Texas

Evergreen Solutions was engaged with the City of Duncanville to provide professional Job Classification, Salary Survey, and Compensation Pay Plan Study Services that allowed the creation of a comprehensive job classification and compensation system and pay plans for employees within the City. Evergreen’s consultants reviewed and analyzed the City’s current structure and practices of job classifications and job descriptions including:



conducting orientation sessions; providing questionnaires; conducting management and employee interviews; reviewing questionnaire responses with supervisory and management staff; performing a job analysis; and developing and/or revising job descriptions.

Evergreen prepared a customized market survey of salaries of the local and area municipalities that included all of the competitive markets where the city recruited employees. Evergreen established a system for an ongoing and easily understood maintenance of the new, or updated, pay plan that was easy for employees to understand and for managers to administer. The recommended pay plan effectively balanced market and internal equity, supported the classification system, and promoted an employee's perception of organizational fairness and equity in the City.



A Classification and Compensation Pay Plan City of Amarillo, Texas

Evergreen Solutions was engaged with the City of Amarillo to develop a Classification and Compensation Pay Plan for 2,200 employees. Evergreen's consultants: reviewed the City's existing classification/compensation system; worked with the City's Human Resources Director and staff to identify a market position for the City; gathered necessary information through the use of questionnaires, job audits, some personal interviews; discussed and determined the appropriate labor market for the compensation survey; analyzed existing internal hierarchy based on job relationships and proposed implementation methods to correct any identified specific problems; developed a pay plan identifying specific parameters; and reviewed and assigned all positions to an appropriate pay grade.

In the end, Evergreen recommended implementation strategies including calculating the cost of implementing the study and provided the Human Resources staff with training to maintain and revise the system, as needed.



Comprehensive Classification and Compensation Study City of Farmers Branch, Texas

Evergreen Solutions was engaged with the City of Farmers Branch to conduct a Comprehensive Compensation and Classification Study. The primary objectives of the study were to: review and revise current classification system; determine relevant competitive markets; develop a custom compensation survey to distribute to peer organizations; propose guidelines for an improved or new compensation program and step/grade plan; and provide recommendations to keep the current pay structure competitive.



Comprehensive Compensation Plan City of Padre Island, Texas

Evergreen Solutions is retained by the City of South Padre Island to design and implement a comprehensive compensation plan for the City of South Padre Island that includes a pay for performance component. The scope of this project includes:

- work with an assigned committee to determine specific needs related to the City in regards to compensation;
- work with the committee to review and establish benchmark cities to be used in determining the City's "competitive market";
- conduct a job analysis to establish pay grades/classification groups for all City positions;
- review current compensation philosophy, policies and plan and work with assigned committee to determine City's compensation philosophy;
- conduct a customized market salary and benefit analysis for all full-time positions that includes additional pay types (i.e. assignment pay, certification pay, education pay, etc.);
- recommend and identify a competitive position within the market (i.e. percentile of market);
- recommend pay structures (grades/classification groups and pay ranges;
- develop a complete, market-sustainable compensation plan that includes a pay for performance structure that rewards those employees with high performance;
- coordinate with the City to illustrate initial (single) and/or multi-year implementation cost scenarios;
- meet with the assigned committee and prepare and present to City Council, as required;
- create and provide administrative policies related detailing the complete compensation plan for insertion into the Employee Handbook; and
- provide comprehensive training for key City staff members for implementation and ongoing maintenance of the approved compensation plan.

Note: This project is nearing completion.



Employee Compensation Consulting Services Fort Bend County, Texas

Evergreen was retained by Fort Bend County to provide employee compensation consulting services. Evergreen conducted the following tasks:

- reviewed current compensation plan including policy groups and salary structures;
- conducted Fair Labor Standards Act (FLSA) exempt/non-exempt status review of all positions;
- analyzed internal equity and possible compression issues;
- completed salary survey of City and County governments in the State of Texas as designated by the County;
- designed and executed a salary survey, analyzed results and made recommendations; and
- evaluated and determined each employee's proper step placement on the newly approved salary grade structure.



Compensation and Classification Study Brazoria County, Texas

Evergreen was retained by the Brazoria County to conduct a Compensation and Classification Study. Evergreen developed a compensation program for the County, evaluated current pay grades, and developed a classification system to facilitate the ongoing compensation analysis. Evergreen assessed position titles and identified appropriate employee status in accordance with FLSA. Evergreen also developed multiple alternative recommendations and a communication plan.



Compensation Study City of Carlsbad, New Mexico

Evergreen Solutions was retained by the City of Carlsbad to conduct a Compensation Study. The study included evaluating 50 administrative positions and three elected official positions as benchmarks against the private and public labor market in the State of New Mexico, and making recommendations to improve competitiveness in alignment with the City's strategic goals. Evergreen's recommendations improved the City's competitiveness and helped prepare it for future recruitment challenges.



Comprehensive Compensation and Classification Study City of Santa Fe, New Mexico

Evergreen Solutions was engaged by the City of Santa Fe to conduct a comprehensive compensation and classification study for all City 1,326 employees, including non-bargaining employees and those covered by collective bargaining agreements. Evergreen conducted orientations and focus groups with general employees, and interviewed department directors and other executive managers. Employees completed Job Assessment Tools, and supervisors completed Management Issues Tools, as needed. The data gathered through this process resulted in JAT scores for each job title, placement of each job into an internal hierarchy, and recommendations as needed for revisions to the current classification structure.

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



Classification Study and Compensation Survey City of Page, Arizona

Evergreen Solutions was engaged with the City of Page to conduct a Classification Study and a Compensation Survey for all employees. As part of the study, Evergreen conducted orientation sessions, focus groups, and interviews. Employees completed a Job Assessment Tool (JAT) in order to analyze job duties and revise the current classification structure. A salary and benefits survey was issued to local and regional employers to assess market competitiveness. Based on the findings from the classification and compensation review, a new pay plan as well as policies and procedures were recommended to the City.



Compensation Study City of Flagstaff, Arizona

City of Flagstaff has hired Evergreen Solutions to conduct a Compensation Study. Evergreen Solutions' consultants will:

- evaluate the current broadband pay plan structure;
- evaluate the current skill-based pay plan, public safety, and general 2080 pay plan structures;



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- conduct a market salary survey of at least five other local government and private sector peer organizations;
 - develop a plan for the City's strategic improvement, including the identification of highly competitive positions within the City; and
 - develop recommendations and guidelines for the continued administration and maintenance of the compensation system.

Note: This project is nearing completion.



Classification and Compensation Study City of Prescott, Arizona

The City of Prescott retained Evergreen Solutions to conduct a Classification and Compensation Study, including the development of a compensation philosophy, to design and implement a comprehensive total compensation plan and to classify all positions appropriately within the plan structure. The study included a complete classification analysis using the Job Assessment Tool job valuation methodology as well as a statistical assessment of internal conditions and an assessment of external equity including salary and benefits surveys of competing organizations. The final report culminated in a series of findings and recommendations that were designed to alleviate any strains on the system and, if necessary, redesign or augment the existing system in place at the City of Prescott. **Note:** This project is nearing completion.



Compensation Study Town of Sahuarita, Arizona

Evergreen Solutions was hired by the Town of Sahuarita to conduct a Compensation Study that is in alignment with the Town's Strategic Management Plan. Evergreen assisted the Town in developing a highly competitive pay philosophy to recruit and retain quality professional staff and surveyed the market to identify proper pay ranges in the public and private sector for similar classifications.



Classification and Compensation and Equal Pay Study City of Albany, Oregon

Evergreen Solutions was retained by the City of Albany to conduct a Classification and Compensation and Equal Pay Study. Evergreen's consultants reviewed current job descriptions and compensation structures



to determine the need for modifications to assure external competitiveness and internal equity by performing the following tasks:

- reviewed current job descriptions to analyze knowledge, ability, education, experience, relevance, and hierarchical consistency;
- developed, distributed, and analyzed job specific questionnaires, as needed, and conducted in-person interviews of select staff to complete analysis;
- proposed, where appropriate, broad-banding of classifications, or combining classifications into a series, if beneficial to achieve alignment of similar positions;
- recommended additions, deletions, or modifications to existing classifications and made FLSA determinations (exempt or non-exempt status) for positions;
- surveyed comparator jurisdictions for both wages and total compensation;
- analyzed results and developed appropriate pay structures for City taking into account compression and internal equity;
- conducted equal pay analyses of recommended pay structures that complied with House Bill (HB) 2005 and its implementing administrative rules; and
- trained City HR staff on the methodology used to assess job classifications in order to maintain internal equity when adding, deleting, or modifying jobs in the future.



Compensation and Classification Study and Equal Pay Analysis Columbia County, Oregon

Evergreen Solutions was retained by Columbia County to conduct a Compensation and Classification Study. Evergreen Solutions worked with the Compensation Study Committee (CoSC) to develop a compensation system for the County, evaluated current pay grades, conducted an equal pay analysis in compliance with the Oregon Equal Pay Law, and developed a classification system to facilitate the continued administration of the compensation analysis. Evergreen's consultants assessed position titles and identified appropriate employee status in accordance with FLSA. Evergreen's consultants will then developed multiple alternative recommendations and a communication plan. Finally, Evergreen reviewed and developed different policies procedures and proposed different recommendations.



**Total Compensation Study
Spokane County, Washington**

Evergreen Solutions was retained by Spokane County to conduct a Total Compensation Study. Evergreen reviewed total Compensation (compensation and benefits) for 1,950 regular, full-time employees in 225 positions and recommended possible wage adjustments that align with the County's compensation philosophy. Additionally, Evergreen compared the County's benefits package with those offered in the same local market identified in the pay analysis.

**Classification Study
Spokane County, Washington**

Evergreen Solutions again retained again by Spokane County to conduct a Classification Study. Evergreen will conduct a job analysis to determine internal equity and will provide recommendations regarding the appropriate classification structure. Evergreen will review and revise job descriptions and make FLSA determinations.

**Classification and Compensation Study
City of Ridgefield, Washington**

Evergreen Solutions is engaged with the City of Ridgefield to conduct a Classification and Compensation Study. The City desires to maintain an internally and externally equitable, yet market competitive, classification and compensation plan. The City strives to competitively recruit and retain employees who will provide the best service to the community. The City has not conducted an in-depth review of the classification and compensation structure since 2015-16 and since that time has grown from 37 to 52 FTE's, including seven (7) new classifications.



Section 3.0

Work Plan



3.0 *Work Plan*

In this section we provide our approach to conducting the Compensation Study for the Town of Kiawah Island, a detailed work plan— identifying the tasks, activities, and milestones necessary to accomplish the deliverables included in the scope of work of the Request for Proposal (RFP)—and a proposed timeline for completing the study.

3.1 Approach and Methodology

Evergreen Solutions is uniquely qualified to conduct a Compensation Study for the Town of Kiawah Island as our team includes recognized experts in local government human resources management and understands that there is not a “one size fits all” solution to compensation management. Our approach is built on working collaboratively with all parties to make sound, implementation-focused recommendations.

Specifically, we have developed a methodology that:

- focuses on market competitiveness;
- is based on the organization’s compensation philosophy;
- recognizes that compensation is comprised of more than just base pay levels;
- reflects changes in recent compensation strategies;
- designs custom solutions that take into account the diversity of needs present in the organization and allows you to select the components and options that best meet your overall needs; and
- produces a structure that improves the organization’s ability to recruit, reward, motivate, and retain talent in a competitive environment that includes both public and private sector employers.

We will work closely with the Town’s designated Project Manager, Mayor, and the Human Resources Department throughout the process to ensure constant communication of issues, concerns, and potential outcomes. Our consultants work closely with your staff to gain a solid understanding of your current operational realities, challenges, and desired outcomes. Moreover, Evergreen Solutions will work with you to balance your need to meet your performance goals while carefully managing the organization’s resources.

Compensation management has undergone significant transformation in the private sector and over time public sector organizations have mirrored these changes. While compensation once centered on the separate administration of base pay and core benefits, a shift has occurred that has transformed compensation management.



	<p>Progressive organizations now recognize that to effectively recruit, reward, motivate, and retain employees, compensation management requires strategic thinking and planning. Compensation management must support an organization's overall strategic direction. To accomplish this, effective organizations design a compensation philosophy that details where an organization wants to be in relation to the market in key areas. These key areas include cash compensation, benefits, and work/life balance. Compensation is thus a reflection of the organization's philosophy.</p> <p>Evergreen realizes that we will need to tailor our approach to fit the operating, fiscal, and competitive needs of the organization. Recommendations must always reflect competitive needs while supporting the organization's overall mission.</p> <p>Listed below is an overview of the typically recommended approach that Evergreen takes when conducting a study of this nature.</p>
Kick Off Meeting	<p>Evergreen begins each engagement by meeting with our client's leadership team. Frequently, this initial meeting will accomplish several goals, including:</p> <ul style="list-style-type: none"> • finalizing the project work plan; • identifying milestone and deliverable dates; • gaining insight into the management structure and approach; • collecting compensation and benefits data; • identifying additional data needs; and • developing preliminary schedules for subsequent tasks. <p>At this time, we will also request a copy of the employee database that reflects current compensation and classification data.</p>
Communication Plan	<p>Communication is a critical component of any Compensation Study. Communicating with employees directly and early in the process builds support for the process and the accompanying outcomes. As part of our communication plan, we meet first with key project staff to fully understand the nature and scope of the project. Regular updates are provided to the client's Project Manager and can be posted on the client's intranet site, if available and desired. Additionally, the communication plan for the distribution of the end product, particularly how the results will be distributed to employees, is also critical.</p>
Developing the Compensation Philosophy	<p>An organization's compensation philosophy is designed to support the overall business strategy. It can take many forms, but ultimately the compensation philosophy selected will guide the structure of the overall compensation system. Evergreen will meet with the client's leadership team to ascertain the organization's overall business strategy and document the various alternatives that are available to support that strategy. Based on the client's needs, Evergreen will provide the client with a comprehensive compensation philosophy to guide subsequent decisions. Typically, a consultant can facilitate the process and make recommendations for the compensation philosophy, but the decision will ultimately rest with the organization itself. It</p>



	<p>is imperative for the client to agree upon a compensation philosophy prior to establishing the remaining components of the compensation system.</p>
Compensation	<p>Our approach to pay plan analysis is based on the belief that compensation should be organization-specific, fair, equitable, and directly tied to strategic goals. To ensure that all these criteria are met, we will conduct an extensive analysis on the relevant labor market, the internal structure and inter-relatedness of jobs within the organization, and the relative worth of jobs within the organization vis-à-vis the compensation philosophy.</p>
Market and Benefits Survey	<p>A key component of assessing compensation is to consider market position, which is sometimes referred to as external equity or competitiveness. Evergreen's consultants wait until well into the classification analysis to design the market survey to ensure that jobs are understood, anomalies in classification characteristics are documented, and sufficient input has been received. The market survey will obtain standard range information related to minimum, midpoint, and maximum salaries. Data collection will focus on the public sector, but will include information from the private sector where applicable. Further, we will look to include any employers to whom the organization has recently lost employees.</p> <p>In addition, a benefits survey will also be administered in tandem with the market survey. Special consideration can be given to select highly competitive, market-driven positions if necessary.</p>
Benchmarks	<p>One of the most important components of the external assessment is in the selection and utilization of benchmark positions for the labor market survey of salary. We will work with the client to identify the appropriate number of benchmark positions to best suit the client's needs in the labor market survey. Based on our experience, we have found that it is simply not practical to survey all positions within the organization—the resulting surveys become too cumbersome for labor market peers to complete, and the response rate on the whole suffers. We ensure, through multiple checks and balances, that the benchmark positions chosen will represent a broad spectrum of positions across the organization, from all job families, pay levels, and functional areas.</p>
Targets	<p>To conduct an external labor market assessment we work with the client to identify the most appropriate targets to survey. Evergreen selects peer organizations based on the local labor competition, regional markets, and class-specific markets. Peer organizations should be those organizations that compete with the client for labor in at least one job family. An appropriate mix of peers in the public and private sectors will be included in the survey, and if necessary, augmented with published secondary data sources.</p> <p>An important factor of our methodology is that the client has the final approval of all aspects of the study. We will not proceed with the analysis unless the client is completely comfortable with the survey targets chosen. Often, there are different factors impacting an organization, such as proximity to a major metropolitan area, technology corridor, or specific market (i.e., military base), that have a direct effect on its ability to recruit and retain employees in specific positions. These factors have to be taken</p>



	<p>into account when selecting survey targets. Once the targets are selected and approved, the survey instrument is developed and sent to the client for final approval. Subsequent to client approval, the survey is then distributed to the targets in both paper and electronic formats.</p> <p>Evergreen uses a four-fold method of communicating with respondents. Our staff notifies the target group that the survey is being sent or made available, confirms receipt, and encourages participation. Once the data are received, they are cleaned, validated, and summarized. A separate report is issued that shows the results of the salary survey.</p>
Unifying the Solution	<p>After determining the appropriate division of work and market position, the compensation structure can be created. There is not a single, perfect solution for every client partner. The nuances and unique characteristics of each client necessitate a customized solution to best meet the organization's needs.</p> <p>The Evergreen Team has considerable experience in developing multiple solutions and working with client partners to determine the one that best meets their needs. Our analytical team uses a variety of tools to produce various potential solutions: regression analysis, market thresholds, and other human resource models. Several major options are presented to the client's team before the implementation plan is created.</p> <p>It is at this stage in the process that we typically meet with the client to identify the direction of the final solution. We will present to the client a draft report for review and comment. We typically ask the client to examine the draft solution objectively and provide insights and recommendations on the direction of the report. When this process is completed, Evergreen's consultants will proceed with the final solution. The solution also contains information regarding fiscal impact and implementation.</p>
Compensation Administration Guidelines	<p>In order for clients to maintain the recommended compensation system, Evergreen develops compensation administration guidelines for use by the client after completion of the study. The guidelines will include recommendations on installation and continuing administration of the system. The team first conducts a review of current practices and procedures then assesses their effectiveness, compliance with legal guidelines, and applicability to the recommended system.</p> <p>Once this review and assessment are complete, revisions to the current practices and/or new guidelines can be recommended, as needed. At a minimum, the recommendations will address areas such as:</p> <ul style="list-style-type: none"> • how employees will move through the pay structure/system as a result of transfers, promotions, or demotions; • how to pay employees whose base pay has reached the maximum of their pay range or value of their position; • the proper mix of pay;



	<ul style="list-style-type: none"> • how often to adjust pay scales and survey the market; • timing of implementation; and • how to keep the system fair and competitive over time.
System Maintenance	<p>Our goal is to produce recommendations that are effective and that can be maintained by our clients. We are strongly committed to providing transparent and replicable solutions. In essence, when we complete our core assignment, our goal is that our client's staff can maintain and update the system on their own. We are readily available to provide assistance, but our goal is to give our clients all the tools and training that are needed. Towards this end we will provide the Human Resources Department with all necessary tools and training to maintain the system over time.</p>
3.2 Detailed Work Plan	<p>Evergreen has provided a detailed work plan to conduct a Compensation Study for the Town of Kiawah Island in this section. Evergreen understands that the Town has 18 unique positions that will be assessed for this study.</p> <p>Our work plan consists of the following nine tasks:</p> <ul style="list-style-type: none"> Task 1: Project Initiation Task 2: Evaluate the Current System Task 3: Identify List of Market Survey Benchmarks and Approved List of Targets Task 4: Conduct a Market Salary Survey and Provide External Assessment Summary Task 5: Conduct a Benefits Survey Task 6: Develop Strategic Positioning Recommendations Task 7: Conduct Solution Analysis Task 8: Develop and Submit Draft and Final Reports Task 9: Develop Recommendations for Compensation Administration
Task 1.0 Project Initiation	<p>TASK GOALS</p> <ul style="list-style-type: none"> • Finalize the project plan with the Town of Kiawah Island (Town). • Gather all pertinent data. • Finalize any remaining contractual negotiations. • Establish an agreeable final time line for overall process, milestones, and deliverables. <p>TASK ACTIVITIES</p> <p>1.1 Discuss with the Town's Project Manager the following objectives:</p> <ul style="list-style-type: none"> • understand the objectives for this project, mission and current compensation philosophy (if any);



**Task 2.0
Evaluate the
Current System**

- review our proposed methodology, approach, and project work plan to identify any necessary revisions;
- reach agreement on a process and timeline for the project including all assignments and project milestones/deliverables, beginning and end dates for each phase and additional meetings;
- establish an agreeable communication schedule.

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

1.3 Obtain relevant materials from the Town, including:

- related background documents;
- any previous projects, research, evaluations, or other studies that may be relevant to this project;
- organizational charts for the departments and divisions, along with related responsibility descriptions;
- current position and classification descriptions and salary schedule(s); benefits information; and
- personnel policies and procedures.

1.4 Review and edit the project work plan and submit a schedule for the completion of each project task.

KEY PROJECT MILESTONES

- Comprehensive project management plan
- Comprehensive database of Town employees

TASK GOAL

- Conduct a comprehensive preliminary evaluation of the current compensation plan for the Town of Kiawah Island.

TASK ACTIVITIES

2.1 Obtain the existing pay structure and compensation philosophy (if any) for the Town. Look for potential problems and issues to be resolved.

2.2 Conduct stakeholder meetings with the Town's Project Manager, Mayor, and Department Heads to identify compensation goals, including, compensation, benefits, merit raises, one-time incentives balancing merit/productivity with retention of experience employees.



**Task 3.0
Identify List of
Market Survey
Benchmarks and
Approved List of
Targets**

- 2.3 Determine the strengths and weaknesses of the current pay plans for the Town and discuss any pay compression issues that need to be addressed and resolved.
- 2.4 Discuss with the Town's Project Manager a compensation philosophy of where the Town desires to be in the market as it relates to employee salaries.
- 2.5 Complete an assessment of current conditions that details the pros and cons of the current system for the Town as well as highlights areas for potential improvement in the final adopted solution.

KEY PROJECT MILESTONES

- Review of existing compensation plan(s)
- Preliminary compensation philosophy
- Assessment of current conditions

TASK GOALS

- Reach an appropriate number and identify the proper benchmark positions for the external labor market assessment of salary.
- Identify and develop a comprehensive list of targets for conducting a successful external labor market salary and benefits assessment.

TASK ACTIVITIES

- 3.1 Identify the list of classifications to include in the labor market assessment, taking into consideration geographic applicability, specific job comparability, and departmental structure. **Note:** Evergreen will use all 18 classifications as benchmarks for the salary survey.
- 3.2 Review current duties with employee questionnaires to identify and review each of the 18 individual job titles.
- 3.3 Finalize the list of positions with the Town's Project Manager.
- 3.4 For each employee group review with the Town's Project Manager peer organizations to use as targets for the salary and benefits survey. **Note:** Evergreen will work with the Town's Project Manager to select up to 20 targets for the salary and benefits survey.
- 3.5 Develop a preliminary list of organizations for the external labor market survey of salary, placing a comparative emphasis on characteristics such as:
 - size of the organization;



Task 4.0
Conduct a Market
Salary Survey and
Provide External
Assessment
Summary

- geographic proximity to the Kiawah Island area;
- economic and budget characteristics; and
- other demographic data.

- 3.6 Develop a list of survey targets by employee group. Develop a system for use of secondary data including potential sources and weighting of secondary data, if necessary.
- 3.7 Review survey methodology with the Town's Project Manager and refine survey methodology prior to distribution of survey.
- 3.8 After approval of survey methodology, develop contact list of peer organizations and notify peers of impending survey.

KEY PROJECT MILESTONES

- Final list of benchmark positions for the external labor market assessment salary survey
- Initial list of survey peers
- Survey methodology
- Final list of survey organizations and contacts

TASK GOALS

- Conduct the external labor market salary survey.
- Provide a summary of the market salary survey results to the Town's Project Manager for review.

TASK ACTIVITIES

- 4.1 Prepare a customized, comprehensive external labor market salary survey for the Town Project Manager's approval. Discuss questions and categories for the market survey.
- 4.2 Contact the targets for electronic completion of the survey. Provide paper copies by fax, if requested.
- 4.3 Conduct necessary follow-up through e-mails, faxes, and phone calls.
- 4.4 Collect and enter survey results into Evergreen's electronic data analysis tools.
- 4.5 Validate all data submitted.
- 4.6 Develop summary report of external labor market salary assessment results.



**Task 5.0
Conduct a Benefits
Survey**

- 4.7 Submit summary report of external labor market salary assessment results to the Town's Project Manager.

KEY PROJECT MILESTONES

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

TASK GOALS

- Conduct an external labor market benefits survey.
- Provide a summary of the survey results to the Town's Project Manager for review.

TASK ACTIVITIES

- 5.1 Develop a listing of the current benefits provided by the Town's Project Manager.
- 5.2 Analyze how the Town divides its benefits between employee and employer cost-sharing as compared to its competitors (i.e., health insurance premiums).
- 5.3 Using the list of Town provided benefits and major benefits offerings not provided by the Town develop a list of benefits to include in the external labor market survey.
- 5.4 Prepare benefits survey to be included with salary survey developed in **Task 4.0**.
- 5.5 Conduct a survey of benefits in use by competitive employers, to include both private and public employers.
- 5.6 Submit benefits survey to the Town's Project Manager for review.
- 5.7 Revise benefits survey.
- 5.8 Distribute benefits survey in conjunction with salary survey.
- 5.9 Develop summary report of external labor market benefits results.
- 5.10 Submit summary report of external labor market benefits results to the Town's Project Manager.

KEY PROJECT MILESTONES

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



Task 6.0
Develop Strategic
Positioning
Recommendations

TASK GOALS

- Assess the appropriateness of the existing compensation philosophy.
- Develop a plan for all employees, providing issue areas and preliminary recommendations for strategic improvement.

TASK ACTIVITIES

- 6.1 Identify the accepted compensation philosophy and accompanying thresholds.
- 6.2 Using the market salary and benefits survey data collected in **Tasks 4.0 and 5.0**, and the compensation data reviewed in **Task 2.0**, determine the proper pay scale including number of grades and ranges.
- 6.3 Identify highly competitive positions within the Town and customize recommendations for compensation where required.
- 6.4 Produce a pay scale(s) that best meets the needs of the Town from an external equity standpoint.
- 6.5 Provide recommendations that accomplish the stakeholder meetings' compensation goals in **Task 2.0**.

KEY PROJECT MILESTONES

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

Task 7.0
Conduct Solution
Analysis

TASK GOALS

- Analyze survey results for the benchmark positions in relation to internal hierarchy of classifications.
- Slot classifications in the recommended pay plan(s).
- Propose several possible options for implementation of the revised/new pay system.

TASK ACTIVITIES

- 7.1 Use a market based approach, or other appropriate techniques, to properly slot each classification into the proposed pay scale.
- 7.2 Place all classifications into pay grades based on **Task Activity 7.1**. Sort alphabetically by job class title, in descending order by range, and by old class title and new class specifications.



**Task 8.0
Develop and
Submit Draft and
Final Reports**

- 7.3 Propose changes for consideration to the overall pay scale that takes into consideration geographic applicability, specific job comparability, and departmental structure; as well as the findings from the salary analysis.
- 7.4 Meet with the Town's Project Manager to discuss the proposed changes to the overall pay scale.
- 7.5 Determine the best solution to meet the needs of the Town in the short- and long-term.
- 7.6 Document the accepted solution.

KEY PROJECT MILESTONES

- Initial regression analysis
- Potential changes
- Documented final solution

TASK GOALS

- Develop and submit a draft and final report of the Compensation Study to the Town of Kiawah Island.
- Present the Final Report.

TASK ACTIVITIES

- 8.1 Develop a comprehensive draft report that outlines the results of each previous step. The draft report will include an estimate of the cost to implement all recommendations.
- 8.2 Submit the comprehensive draft report to the Town's Project Manager for review and approval.
- 8.3 Make edits and submit necessary copies of the final report.
- 8.4 Present the final report.
- 8.5 Develop a communication plan for sharing study results with employees.
- 8.6 Develop implementation database to communicate the process and progress of this project to the Town's Project Manager.
- 8.7 Develop a plan for maintaining recommendations over time.



Task 9.0

**Develop
Recommendations
for Compensation
Administration**

KEY PROJECT MILESTONES

- Draft and final reports
- Final presentation
- Communication plan
- Implementation and maintenance database

TASK GOAL

- Develop recommendations for a maintenance program so administration by Town staff may sustain the recommended compensation system.

TASK ACTIVITIES

- 9.1 Develop recommendations and guidelines for continued administration and maintenance of the compensation system, including recommendations and guidelines related to:
- how employees will move through the pay structure/ system as a result of transfers, promotions, or demotions;
 - how to pay employees whose base pay has reached the maximum of their pay range or value of their position;
 - the proper mix of pay;
 - how often to adjust pay scales and survey the market;
 - the timing of implementation; and
 - how to keep the system fair and competitive over time.
- 9.2 Recommend recruitment/retention strategies, where appropriate.
- 9.3 Finalize and present recommendations to the Town's Project Manager for review.

KEY PROJECT MILESTONES

- Recommendations for compensation administration
- Recommendations for recruitment/retention policies



3.3 Proposed Timeline

Evergreen possesses the ability, staff, skills, and tools to conduct the Compensation Study for the Town of Kiawah Island in three months of the project start date and following signing of the contract. This timeline is based on a tentative start date of April 15, 2020, and a completion date of July 15, 2021.

Our timeline can be modified in any way to best meet the needs of the Town of Kiawah Island.



Section 4.0
Pending Legal Actions and W-9 Form



4.0 Pending Legal Actions and W-9 Form

There are no pending legal actions against Evergreen Solutions or its employees.

Attached is a signed W-9 Form.



Section 5.0

Cost and Outsourcing Statement



5.0 *Cost and Outsourcing Statement*

Evergreen Solutions, LLC is pleased to present our proposed cost to conduct a Compensation Study for the Town of Kiawah Island. We are committed to providing the highest quality consulting services to our client partners for a reasonable price. Our firm is fortunate that our overhead is minimal and our expenses are reasonable so we can pass that cost savings on to our clients.

Our total, not-to-exceed, fixed cost to complete all tasks identified in our detailed work plan in **Section 3** of our proposal is included on the **Submittal Form** which is attached along with the other forms with our cover letter. Our cost is all inclusive, and includes travel costs (meals and lodging), transportation, fringe benefits, indirect costs (overhead), clerical support, and all other out-of-pocket expenses. Our cost includes two separate onsite visits to Kiawah to perform the requested work.

Our preferred payment schedule is as follows:

- 33% - upon completion of Tasks 1 – 2
- 33% - upon completion of Tasks 3 – 5
- 34% - upon completion of Tasks 6 – 9

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



Note: Evergreen will not be outsourcing any of the work under this contract. All work will be performed by in-house staff located at 2878 Remington Green Circle, Tallahassee, FL 32308.





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WAYS AND MEANS

Agenda Item



Request for Ways and Means Committee Recommendation

TO: Ways and Means Chairman and Committee Members

FROM: Brian Gottshalk, Public Works Manager

SUBJECT: Request for Recommendation for Installation of New Kiawah Island Sign

DATE: 22 March, 2021

BACKGROUND:

The current Kiawah Island sign just before the main gate has become noticeably weathered and continues to be impacted by natural elements. In light of the upgrades to the rest of the parkway, Town Staff feels the need to upgrade this sign as well, creating a more welcoming entrance to the island for residents and guests.

ANALYSIS:

We procured a master design plan from the Community Association for the new sign that maintains the look and feel of the new signage that has been implemented throughout the island. This design plan was sent out to 4 vendors. Three vendors responded with quotes for the fabrication and installation of the new sign. The estimates are as follows:

Southwood: \$27,931.00

Lowcountry Signs: \$17,467.00

Fast Signs: \$15,000.000

I would like to note that Fast Signs explained that this is a “ballpark” estimate and also noted that the Western Red Cedar wood that is part of the design plan can be difficult to source. Further, I will meet on site with any contractor that is selected to carry out this work to make sure that the scope their scope is consistent with our expectations.

ACTION REQUESTED:

Town Staff requests that the Ways and Means Committee recommend to Town Council the approval for Fast Signs for the fabrication and installation of a new Kiawah Island entrance sign.

BUDGET & FINANCIAL DATA:

The estimated cost of \$15,000 for this work would be sourced from the General Fund.

primary identity

design rationale

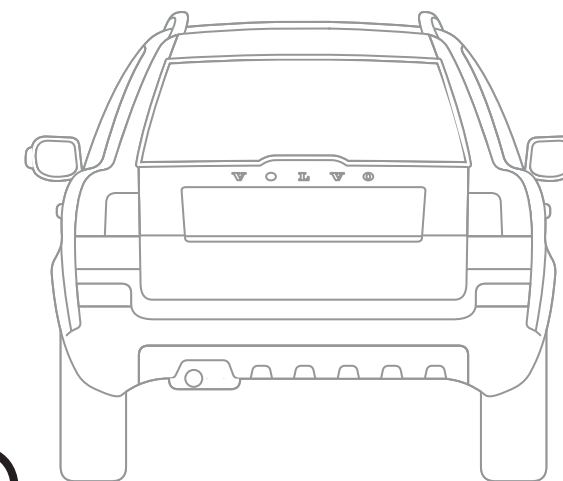
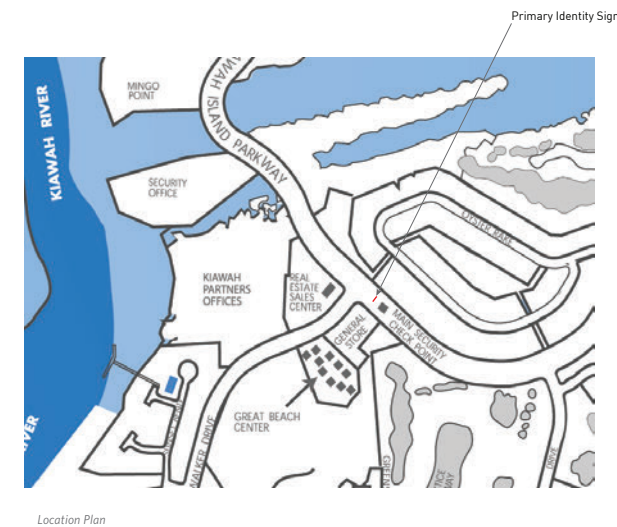
The purpose of these signs are to provide visitor's with a "sense of arrival." It sets the stage for their Kiawah Island experience and conveys the island's brand. The use of large scale timbers reflects the previous signage design, yet with a more contemporary look. The dimensional metal letters signify the quality and lasting value of Kiawah Island while reflecting the surrounding beauty of its environment.

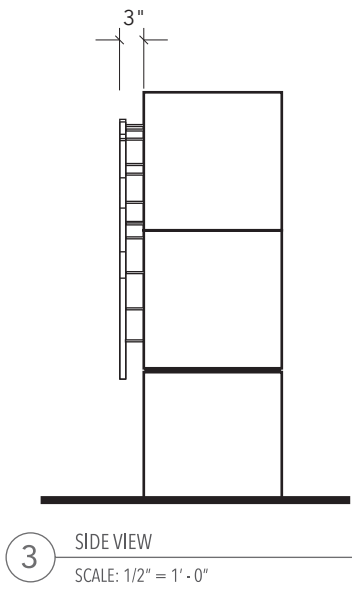
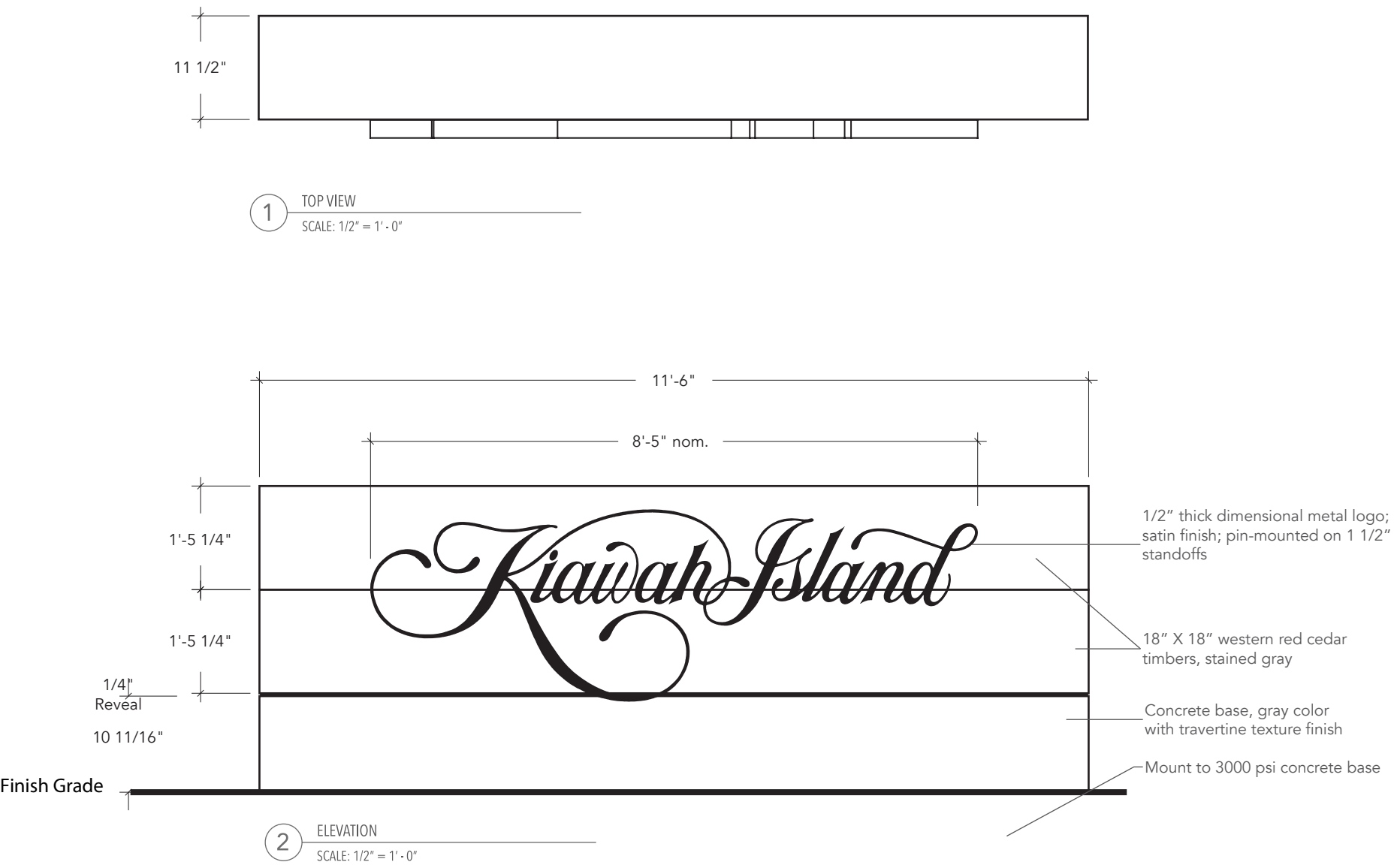
message criteria

Only the Kiawah Island script logo is to be used on these signs.

placement & orientation

These signs are to replace the existing primary identity signs; one at the roundabout to guide visitor's on to the parkway and one at the Main Entrance gate. The sign on the roundabout is to be tangent to the roundabout. The sign at Main Entrance gate is to be perpendicular to roadway.





2.1 DESIGN INTENT DRAWINGS

Sign Type A1

Construction Details

MATERIALS: Sign fabricated from S4S smooth finished Western Red Cedar timbers; logo is 1/2" titanium with lightly brushed finish, pin-mounted to face with 1 1/2" stainless steel standoffs; base is colored textured concrete with stain finish.

INSTALLATION: Sign is installed onto internal steel tubes directly buried into poured concrete footers. Footer to have concrete pad; top of pad is to be level with finish grade level .

Fabricator responsible for engineering framing, footings and concrete base .

THIS DRAWING REPRESENTS DESIGN INTENT ONLY

CLIENT/PROJECT:
Kiawah Island Community Association
Master Sign Plan

PROJECT NO.
KI-327

DATE:
7/18/15

REVISIONS:

SCALE:
As Shown



1 ELEVATION
SCALE: 3/4" = 1' - 0"



2.2 DESIGN INTENT DRAWINGS WING S

Sign Type A1

Graphics Details

THIS DRAWING REPRESENTS DESIGN INTENT ONLY		
CLIENT/PROJECT: Kiawah Island Community Association Master Sign Plan		PROJECT NO. KI-327
DATE: 7/18/15	REVISIONS:	SCALE: As Shown
© Rodger Motiska Design, LLC		



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WAYS AND MEANS

Agenda Item

NARRATIVE HIGHLIGHTS

EXPENDITURES

- ✓ The personnel cost shows 9%, or 160K increase compared to FY2021 projections. This increase is attributable to the following items:
 1. The budget includes funding for 20 regular, full-time employees compared to 19 employees in FY21. It includes a request for a new position -PW Assistant/Groundskeeper (\$35K annually). It also includes a request for PT help with deer surveys (\$4K), social media contributor-(2.5K), and an intern for Planning Department-(\$12K).
 2. The budget assumes 5%, or \$65K merit increase (included in Administration Department).
 3. The budget includes 0.9%, or \$22K increase in SC Retirement System effective July 1, 2021.
 4. This budget includes estimated 2% increase in Town's health insurance contributions effective January 1, 2022.
- ✓ This budget includes continued funding for law enforcement coverage on the Island. There are no changes to the contract for the Off-Duty Deputies and 2%, or \$10K payroll increase, announced by CCSO for deputies contracted with the County on the first shift.
- ✓ STR Code Enforcement is budgeted with no change based on the contract with Island Beach Services. The negative 3%, or \$10K variance related to additional staffing to help with emergency ordinance compliance in the current year.
- ✓ Utilities and Supplies show an increase of 10%, or \$23K and consist of following line items:
 1. Utilities general office supplies are budgeted with no change.
 2. Minor Assets show 186%, or \$23K increase to account for landscaping equipment, additional deer removal equipment and computers upgrades.
- ✓ Advertising cost shows 47%, or \$4.5k increase when compared to current year projections.
- ✓ Communication cost shows an increase of 1%, or 500 when compared to FY2021 projections.
- ✓ Waste management is budgeted with no change.
- ✓ Insurance cost shows an increase of 15%, or \$19K attributable to the estimated increase in premiums and
- ✓ Professional Services show an increase of 4%, or \$5.1K and include the following:
 1. \$100K for Town Attorney (\$90K -contract and \$10k for additional services not covered under contract)
 2. \$10K for the Town Prosecutor
 3. \$26K for annual audit
 4. \$5K for Misc.
- ✓ Consultant cost has decreased by 13%, or \$26K. Under the line-item Consultants, funding was budgeted for various services including:
 1. \$16K for miscellaneous legal and consulting services
 2. \$16K for deer removal/ processing
 3. \$30K for marsh management plan

4. \$70K for website design (carryover from current year)
 5. \$6K for stenographers
 6. \$13k for structural consultants to be used on Parcel 13 and Senior Living Facility
 7. \$13K for documents management
 8. \$10K placeholder for work on Beachwalker Drive
- ✓ Maintenance cost shows 8%, or \$36K increase when compared to FY2021 projections and consists of the following:
 1. Software Maintenance shows 1%, or \$1.1K increase when compared to current year projections.
 2. Building and Vehicle Maintenance shows 17%, or 16K decrease related mostly to installation of air purification system in the current year.
 3. Landscaping Maintenance shows 24%, or \$51K increase attributable to a request of \$50K for MC landscaping modifications.
 - ✓ Travel & Training shows 66%, or approximately \$22K increase when compared to current year projections. The increase relates to the assumption live conferences and seminars will resume in FY2022.
 - ✓ Rental cost for the copiers and postage machine shows 10%, or \$4k increase due to an upgrade in postage machine.
 - ✓ Tourism & Recreation shows 47%, or approximately \$760K increase compared to current year projections. The line item consists of funding for the following items:

Funding Sources:	GF	SATAX	CATAX	LATAX	HTAX	Total
Arts & Cultural	\$115,000			\$140,000	\$22,000	\$297,000
an increase of \$242K when compared to current year projections.						
Promotional Fund		\$459,751				\$459,751
A decrease of \$100k when compared to current year projections.						
SATAX Applicants*		\$1,046,432				\$1,046,432
An increase of \$316K when compared to current year projections.						
Beach patrol		\$100,000	\$227,674			\$327,674
No change						
Beach monitoring			\$50,000			\$50,000
An increase of \$10K when compared to current year projections.						
Wildlife			\$123,100	\$6,000		\$129,100
An increase of \$52K when compared to current year projections.						
KI Conservancy			\$50,000			\$50,000
A decrease of \$48K when compared to current year projections. The decrease relates to Ground Water study, phase II being conducted in current fiscal year (\$49K)						

* Total for SATAX applicants does not include funding for deputies and beach patrol as included in other cost categories already. Also, assuming same as in FY2019 SATAX funding for the Town applications.

- ✓ Other Cost line item shows 103%, or \$168k increase and includes banking and credit card cost, printing, catering, community activities and outreach, dues and subscriptions, contingency, and miscellaneous expenditures. The increase is mostly attributable to \$100K in contingency.
- ✓ The budget reflects requests for the following capital expenditures:
 1. \$150K- Garage renovations
 2. \$80K -2 new vehicles
 3. \$100K-placeholder for Beachwalker Dr

✓ The budget includes the following interfund transfers:

1. \$118,000 from GF to AC for Arts Council events
2. \$236,538 from LATAX to AC for cultural events and partial salaries
3. \$197,279 from LATAX to Capital Fund for future beach renourishment
4. \$197,279 from LATAX to Capital Fund to an emergency fund
5. \$49,500 from LATAX to GF for 45% of the cost for Beachwalker Dr. improvements
6. \$50,000 from Beverage Tax Fund to Capital Fund for future infrastructure repairs
7. \$22,000 from Hospitality Tax Fund to AC for cultural events
8. \$115,377 from Hospitality Tax Fund to Capital Fund for future infrastructure repairs
9. \$115,377 from Hospitality Tax Fund to Capital to emergency fund
10. \$44,000 from Hospitality Tax Fund to GF for 40% of the cost for Beachwalker Dr. improvements

ITEMS TO DISCUSS

1. **New position- Public Works Assistant/Groundskeeper** - The request is for full time position to oversee MC groundskeeping (reduction in the Greenery contract of \$40K) and overflow trash on the beach and KI Parkway. Payroll cost for the employee including benefits and FICA - is \$55K and one-time initial cost for the vehicle-\$50K and landscaping equipment - \$10K.
2. **Garage Renovation and Car Wash Modifications** - The request of estimated \$150K is for converting/finishing up part of the garage into working space for wildlife department and improve the car washing area next to the garage.
3. **Municipal Center Landscaping Improvements** - The request of \$50K is a place holder for modifications to the landscaping around MC.
4. **Beachwalker Drive Improvements** - The budget includes a placeholder of \$100K for the safety improvements pending the results of Kimley-Horn study.
5. **Wildlife Research and Programs** - These line items are funded from CATX.

a) Wildlife Research has the total budget of \$79K and include following initiatives:

- Fall Migration Banding-(\$22K)
- Marsh Sparrow Banding (\$1K)
- Painted Bunting Banding (\$1K)
- Bobcat GPS project (\$13K)
- Wildlife Toxicology Study (\$7K)

b) SGA Study with Clemson collaboration (\$50K)- This PhD research project has been developed collaboratively with Clemson University's Wildlife and Fisheries Department and Town Biologists. The study will last 4 years, including 3 years of intensive field work. The overall goal of the project is to better understand the health and future viability of Kiawah's bobcats and other wildlife, quantify the impacts from rodenticides, and develop long-term solutions.

The project has 5 major objectives :

- Monitor SGA rodenticide concentrations in bobcats, and patterns in bobcat behavior and survival over the next 3 years on Kiawah and Yawkey Islands.
- Assess historical patterns in bobcat behavior and demography on Kiawah Island over time using existing data.
- Assess patterns in bobcat diet.
- Continue monitoring of SGA concentrations in small carnivores other than bobcats over the next 3 years on Kiawah Island.
- Quantify rodent species distribution/density and SGA concentrations on Kiawah Island.

The total cost of this study is \$965,450. Significant funding has already been secured from Clemson's Public Service and Agricultural Department (PSA) and Clemson's Department of Pesticide Regulation (DPR) totaling \$280,000. SCDNR has committed \$120,000 and additional funds will likely come from the pest control industry and other sources. A Town commitment of \$200,000 (\$50k for 4 years) is essential to the project's success and would make the Town an equal partner in this vital research project.

c) The wildlife programs have a budget of \$20K include the following:

- Dolphin Stewardship Program – Collect data on dolphin behavior at Captains Sams inlet and educate beachgoers about proper dolphin viewing etiquette. (\$9k)

- Shorebird Stewardship Program – Volunteers educate beachgoers regarding nesting and migratory shorebirds. Provide equipment and T shirts (\$1K)
- Bluebird Box Program – Volunteers build, maintain, and monitor more than 200 nesting boxes on the island. Materials and equipment (\$1K)
- Placeholder for projects that may come up next year (\$9K)
- Fish Studies and Equipment (\$4K)
- Pond Management (5K)
- Turtle Patrol (\$6K)

6. **KI Conservancy** - The Town continuously supports Conservancy by funding some of their projects. FY22 budget has a request of \$50K.
7. **Vehicle** purchase for Building Department-\$40K. The staff will provide comparison of leasing versus purchasing once the information is available.

Town of Kiawah Island
Budget Draft FY2022 to Annualized Budget FY2021
All Funds Consolidated
Cash Basis

	Budgeted Sources & Uses								
	Actuals FY 2019	Budgeted FY2021	Amended Budget FY 2021	Annualized FY2021	Budget FY2022	FY2021 Annualized Variance \$	FY2021 Annualized Variance %	FY2019 Actuals Variance \$	FY2019 Actuals Variance %
Revenues*:									
Building Permits	\$ 987,649	\$ 664,493	\$ 664,493	\$ 900,000	\$ 900,000	\$ -	0%	\$ (87,649)	-9%
Building Permits/Special Projects	263,197	-	-	100,000	100,000	-	0%	(163,197)	-62%
Business Licenses	2,535,128	2,267,184	2,267,184	2,650,000	2,695,000	45,000	2%	159,872	6%
Franchisee Fees	857,732	856,184	856,184	856,184	860,000	3,816	0%	2,268	0%
Local Option tax	585,738	472,073	602,567	629,465	597,453	(32,012)	-5%	11,715	2%
State ATAX	1,585,786	1,356,025	1,688,275	1,967,363	1,617,505	(349,858)	-18%	31,719	2%
Local ATAX	967,051	734,510	858,938	1,086,685	986,392	(100,293)	-9%	19,341	2%
County ATAX	484,000	-	-	-	200,000	200,000	100%	(284,000)	-59%
Hospitality Tax	576,884	411,357	457,985	508,925	576,884	67,959	13%	-	0%
Solid Waste Fees	551,180	600,000	600,000	608,933	610,000	1,067	0%	58,820	11%
Interest	432,733	312,500	140,000	39,000	34,000	(5,000)	-13%	(398,733)	-92%
Other*	161,854	160,000	160,000	174,999	160,000	(14,999)	-9%	(1,854)	-1%
Total Revenue	\$ 9,988,932	\$ 7,834,326	\$ 8,295,626	\$ 9,521,553	\$ 9,337,234	\$ (184,320)	-2%	\$ (651,698)	-7%
Expenses:									
Salaries	1,304,430	1,273,140	1,287,140	1,291,316	1,386,994	95,679	7%	82,564	6%
Overtime	2,091	3,500	3,500	2,620	4,200	1,580	60%	2,109	101%
Benefits	411,335	380,376	390,376	388,381	438,985	50,604	13%	27,650	7%
Payroll Tax	107,201	125,543	125,543	119,144	131,063	11,919	10%	23,862	22%
Employee Subtotal	1,825,057	1,782,559	1,806,559	1,801,461	1,961,243	159,782	9%	136,186	7%
Public Safety/Payroll and Related Cost/ Off Duty [480,472	439,015	439,014	439,014	439,631	617	0%	(40,841)	-9%
Public Safety/CCSO Contract	60,422	345,880	345,880	345,880	356,624	10,744	2%	296,202	490%
STR Code Enforcement	-	288,580	288,580	299,018	288,580	(10,438)	-3%	288,580	NA
Utilities & Supplies	208,332	265,343	265,343	227,878	250,900	23,022	10%	42,568	20%
Advertising	10,113	4,500	4,500	9,500	14,000	4,500	47%	3,887	38%
Communications	50,042	51,820	51,820	67,820	68,320	500	1%	18,278	37%
Waste Management	1,065,707	1,034,080	1,034,080	1,053,000	1,053,000	-	0%	(12,707)	-1%
Insurance	140,679	140,556	140,556	131,703	150,824	19,121	15%	10,145	7%
Professional Services	115,940	111,000	111,000	135,900	141,000	5,100	4%	25,060	22%
Consultants	126,641	61,500	161,500	201,530	176,000	(25,530)	-13%	49,359	39%
Maintenance	452,667	453,160	469,145	475,869	511,800	35,931	8%	59,133	13%
Travel & Training	24,756	53,300	53,300	32,497	54,000	21,503	66%	29,244	118%
Rentals	32,899	41,000	41,000	41,000	45,000	4,000	10%	12,101	37%
Tourism & Recreations	1,854,958	1,507,172	1,523,572	1,600,032	2,359,957	759,925	47%	504,999	27%
Contributions	150,000	150,000	150,000	150,000	150,000	-	0%	-	0%
Other	257,464	246,945	246,945	163,089	330,583	167,494	103%	73,119	28%
Capital Outlay:									
Building	-	-	-	11,250	150,000	138,750	1233%	150,000	NA
Infrastructure and Landscaping	446,397	500,000	500,000	854,378	100,000	(754,378)	-88%	(346,397)	-78%
Vehicles	34,159	-	-	-	90,000	90,000	NA	55,841	163%
Other	12,303	-	66,544	78,544	-	(78,544)	-100%	(12,303)	-100%
Debt Service	366,507	357,916	2,025,916	2,020,181	-	(2,020,181)	-100%	(366,507)	-100%
Total Expenses	7,715,515	7,834,326	9,725,254	10,139,544	8,691,462	(1,448,082)	-14%	975,947	13%
Net Changes in Fund Balance	\$ 2,273,417	\$ (0)	\$ (1,429,628)	\$ (617,991)	\$ 645,771	\$ 1,263,762	204%	\$ (1,627,646)	-72%

* FY19 Actuals Misc does not include one time revenues: FEMA reimbursement and restitution payment from the former administrator.

* FY2021 Amended Budget Misc does not include one time revenues: SC Cares reimbursement

TOWN OF KIAWAH ISLAND
BUDGET DRAFT FOR YEAR ENDED 6/30/22
ALL FUNDS

	2020-2021 Budget										
	General Fund Budget	State Accom Tax Fund Budget	County Accom Tax Fund Budget	Local Accom Tax Fund Budget	Beverage Tax Fund Budget	Hospitality Tax Fund Budget	Victims Assist Fund Budget	Arts and Cultural Events	Capital Fund Budget	Emergency Fund Budget	Total Funds Budget
<u>Revenues & Other Sources :</u>											
Accommodations Tax	\$ 85,000	\$ 1,532,505	\$ 200,000	\$ 986,392	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 2,803,897
Hospitality Tax	-	-	-	-	-	576,884	-	-	-	-	576,884
Aid to subdivisions	35,000	-	-	-	-	-	-	-	-	-	35,000
Zoning Permits	10,000	-	-	-	-	-	-	-	-	-	10,000
Business License Revenue	2,695,000	-	-	-	-	-	-	-	-	-	2,695,000
Building Permits	900,000	-	-	-	-	-	-	-	-	-	900,000
Building Permits/Special Projects	100,000	-	-	-	-	-	-	-	-	-	100,000
Local Option Sales Tax	597,453	-	-	-	-	-	-	-	-	-	597,453
Franchise Fee - Electric	420,000	-	-	-	-	-	-	-	-	-	420,000
Franchise Fee -Beach	300,000	-	-	-	-	-	-	-	-	-	300,000
Franchise Fee - Other	140,000	-	-	-	-	-	-	-	-	-	140,000
Fines & Forfeitures	25,000	-	-	-	-	-	10,000	-	-	-	35,000
Interest Revenue	10,000	2,000	5,000	6,000	-	6,000	-	-	4,000	1,000	34,000
Solid Waste Collections	610,000	-	-	-	-	-	-	-	-	-	610,000
Beverage Tax / Permits	-	-	-	-	45,000	-	-	-	-	-	45,000
Miscellaneous Revenue	35,000	-	-	-	-	-	-	-	-	-	35,000
Transfers In	-	-	-	-	-	-	-	376,538	362,655	312,655	1,051,848
Total Revenues & Other Sources	5,962,453	1,534,505	205,000	992,392	45,000	582,884	10,000	376,538	366,655	313,655	10,389,082
<u>Expenditures & Uses :</u>											
Salary and Benefits/Regular Employees	1,748,097	-	-	139,608	-	-	-	73,538	-	-	1,961,243
Salary and Benefits/Deputies	54,631	385,000	-	-	-	-	-	-	-	-	439,631
Public Safety/CCSO Contract	49,793	-	-	306,831	-	-	-	-	-	-	356,624
STR Code Enforcement	288,580	-	-	-	-	-	-	-	-	-	288,580
Utilities & Supplies	118,650	-	35,000	2,500	-	91,750	-	3,000	-	-	250,900
Advertising	14,000	-	-	-	-	-	-	-	-	-	14,000
Communication	68,320	-	-	-	-	-	-	-	-	-	68,320
Waste Management	970,000	-	30,000	53,000	-	-	-	-	-	-	1,053,000
Printing	47,700	-	-	-	-	-	-	-	-	-	47,700
Professional Services	141,000	-	-	-	-	-	-	-	-	-	141,000
Consulting	176,000	-	-	-	-	-	-	-	-	-	176,000
Maintenance	333,900	-	26,900	-	-	151,000	-	-	-	-	511,800
Insurance	150,824	-	-	-	-	-	-	-	-	-	150,824
Travel & Training	54,000	-	-	-	-	-	-	-	-	-	54,000
Rentals	45,000	-	-	-	-	-	-	-	-	-	45,000
Tourism Related Cost	-	1,606,183	450,774	6,000	-	-	-	297,000	-	-	2,359,957
Contributions	150,000	-	-	-	-	-	-	-	-	-	150,000
Capital Outlay	246,500	-	-	49,500	-	44,000	-	-	-	-	340,000
Capital Outlay/Town Hall	-	-	-	-	-	-	-	-	-	-	-
Other	169,883	-	-	-	-	-	10,000	3,000	-	-	182,883
Contingency	100,000	-	-	-	-	-	-	-	-	-	100,000
Transfers Out	118,000	-	-	631,095	50,000	252,754	-	-	-	-	1,051,848
Total Expenditures & Uses	5,044,878	1,991,183	542,674	1,188,534	50,000	539,504	10,000	376,538	-	-	9,743,310
Change in Fund Balance	\$ 917,575	\$ (456,679)	\$ (337,674)	\$ (196,142)	\$ (5,000)	\$ 43,380	\$ -	\$ -	\$ 366,655	\$ 313,655	\$ 645,771

TOWN OF KIAWAH ISLAND
BUDGET FOR YEAR ENDED 6/30/2022
ALL FUNDS

	General Fund	State Accom Tax	County Accom Tax	Local Accom Tax	Beverage Tax	Hospitality Tax	Victims Assist	Arts and Cultural	Capital Fund	Emergency Fund	Consolidated
BEGINNING FUND BALANCE - 6/30/20 AUDITED	\$ 11,737,538	\$ 213,708	\$ 1,302,358	\$ 1,133,807	\$ 23,974	\$ 1,185,538	\$ 21,150	\$ -	\$ 4,907,385	\$ -	\$ 20,525,458
SOURCES:											
REVENUES	6,026,700	1,869,363	5,000	1,092,685	45,000	514,925	10,000	-	5,000	-	9,568,672
TRANSFERS IN	-	-	-	-	-	-	-	76,763	2,389,303	319,122	2,785,188
TOTAL	6,026,700	1,869,363	5,000	1,092,685	45,000	514,925	10,000	76,763	2,394,303	319,122	12,034,738
USES:											
EXPENDITURES	4,471,900	1,290,209	522,999	698,620	-	241,959	10,000	76,763	2,020,181	-	9,332,631
CAPITAL OUTLAY	123,061	-	-	461,280	-	359,831	-	-	-	-	944,172
TRANSFERS OUT	2,035,141	-	-	488,457	50,000	211,590	-	-	-	-	2,785,188
DEBT SERVICE	-	-	-	-	-	-	-	-	2,020,181	-	2,020,181
TOTAL	6,630,102	1,290,209	522,999	1,648,357	50,000	813,380	10,000	76,763	2,020,181	-	13,061,991
ENDING FUND BALANCE - 6/30/21 PROJECTED	11,134,136	792,862	784,359	578,135	18,974	887,083	21,150	-	5,281,507	319,122	19,498,205
SOURCES:											
REVENUES	5,962,453	1,534,505	205,000	992,392	45,000	582,884	10,000	-	4,000	1,000	9,337,234
TRANSFERS IN	-	-	-	-	-	-	-	376,538	362,655	312,655	1,051,848
TOTAL	5,962,453	1,534,505	205,000	992,392	45,000	582,884	10,000	376,538	366,655	313,655	10,075,427
USES:											
EXPENDITURES	4,680,379	1,991,183	542,674	507,939	-	242,750	10,000	376,538	-	-	8,351,463
CAPITAL OUTLAY	246,500	-	-	49,500	-	44,000	-	-	-	-	340,000
TRANSFERS OUT	118,000	-	-	631,095	50,000	252,754	-	-	-	-	1,051,848
TOTAL	5,044,879	1,991,183	542,674	1,188,534	50,000	539,504	10,000	376,538	-	-	9,743,311
NET CHANGE	917,575	(456,679)	(337,674)	(196,142)	(5,000)	43,380	-	-	366,655	313,655	645,771
BUDGETED ENDING FUND BALANCE - 6/30/22	\$ 12,051,710	\$ 336,183	\$ 446,685	\$ 381,993	\$ 13,974	\$ 930,463	\$ 21,150	\$ -	\$ 5,648,162	\$ 632,777	\$ 20,143,976

	2020-2021	2020-2021	Actuals thru	Annualized	2021-2022	FY 21 Amended	FY 21	FY 21	FY 21	
	Budget	Amended Budget	1/31/21	2020-2021	Proposed Budget	Budget	Amended	Projections	Projections	Justifications/Notes
						\$ Change	Budget	\$ Change	% Change	
							% Change			
GENERAL FUND										
REVENUES:										
BUSINESS LICENSE REVENUE	\$ 1,867,184	\$ 1,867,184	\$ 934,124	\$ 2,250,000	2,295,000	\$ 427,816	23%	\$ 45,000	2%	Based on FY2019 actuals
STR APPLICATION FEES	400,000	400,000	200,355	400,000	400,000	-	0%	-	0%	Based on current year actuals
STATE ACCOMMODATIONS TAX	85,000	85,000	65,557	100,000	85,000	-	0%	(15,000)	-15%	First \$25K plus 5% of SATAX
AID TO SUBDIVISION	35,000	35,000	19,275	35,000	35,000	-	0%	-	0%	Based on current year actuals
SOLID WASTE REVENUE	600,000	600,000	603,933	608,933	610,000	10,000	2%	1,067	0%	Based on number of subscribers for different service types
PLANNING FEES	10,000	10,000	5,610	10,000	10,000	-	0%	-	0%	Based on current year actuals
BUILDING PERMITS	664,493	664,493	649,237	900,000	900,000	235,507	35%	-	0%	Based on prior year averages
BUILDING PERMITS/SPECIAL PROJECTS	-	-	-	100,000	100,000	100,000	NA	-	0%	Phase I of Parcel 13
LOCAL OPTIONS SALES TAX	472,073	602,567	380,063	629,465	597,453	(5,114)	-1%	(32,012)	-5%	Based on FY2019 actuals
FRANCHISE FEE - ELECTRIC	416,184	416,184	415,837	415,837	420,000	3,816	1%	4,163	1%	Based on current year actuals
FRANCHISE FEE - BEACH SERVICE	300,000	300,000	220,355	300,000	300,000	-	0%	-	0%	\$300k or 30% of Island Beach Services gross receipts
FRANCHISE FEES - OTHER	140,000	140,000	76,414	140,000	140,000	-	0%	-	0%	Based on the contracts with AT&T, Comcast, KIGR
COURT FEES, FINES & FORF	25,000	25,000	35,636	40,000	25,000	-	0%	(15,000)	-38%	Based on for FY2019
INTEREST REVENUE	150,000	50,000	12,151	15,000	10,000	(40,000)	-80%	(5,000)	-33%	Approximately 0.05% rate of return on investments
MISCELLANEOUS REVENUE	35,000	35,000	7,035	35,000	35,000	-	0%	-	0%	Based on the current year
UNBUDGETED REVENUES	-	-	47,465	47,465	-	-	100%	(47,465)	-100%	SC Cares Reimbursement in CY
TOTAL REVENUES	5,199,934	5,230,428	3,673,047	6,026,700	5,962,453	732,025	14%	(64,247)	-1%	
OTHER FINANCING USES/SOURCES:										
DEFICIENCY OF REVENUES OVER EXPENDITURE	-	842,212	-	603,403	-	(842,212)	N/A	(603,403)	N/A	
TOTAL REVENUES & OTHER SOURCES	\$ 5,199,934	\$ 6,072,640	\$ 3,673,047	\$ 6,630,103	5,962,453	\$ (110,187)	-2%	\$ (667,650)	-10%	

TOWN OF KIAWAH ISLAND
BUDGET FOR YEAR ENDED 6/30/21
GENERAL FUND

	2020-2021 Budget	2020-2021 Amended Budget	Actuals thru 1/31/21	Annualized 2020-2021	2021-2022 Proposed Budget	FY 21 Budget \$ Change	FY 21 Budget % Change	FY 21 Projections \$ Change	FY 21 Projections % Change	Justifications/Notes
EXPENDITURES:										
SALARIES	1,273,140	1,287,140	763,091	1,291,316	1,386,994	99,854	8%	95,679	7%	Salaries for 19 current employees with 5% increase plus new position
OVERTIME	3,500	3,500	1,977	2,620	4,200	700	20%	1,580	60%	
BENEFITS	380,376	390,376	219,460	388,381	438,985	48,609	12%	50,604	13%	
PAYROLL TAXES	125,543	125,543	75,316	119,144	131,063	5,520	4%	11,919	10%	
SALARIES, PR TAXES & BENEF/DEPUTIES	439,014	439,014	274,119	439,014	439,631	617	0%	617	0%	Salaries for off duty deputies.
DEPUTIES CONTRACTED WITH CCSO	345,880	345,880	244,758	345,880	356,624	10,744	3%	10,744	3%	Deputies contracted with CCSO
STR CODE ENFORCEMENT	288,580	288,580	232,237	299,018	288,580	-	N/A	(10,438)	-3%	Contract with Island Services for after hours code enforcement
UTILITIES & SUPPLIES:		-				-		-		
UTILITIES	160,343	160,343	55,940	150,000	150,000	(10,343)	-6%	-	0%	Based on current year actuals and increase for new landscaping
GENERAL	65,900	65,900	37,516	65,450	65,400	(500)	-1%	(50)	0%	Estimate for supplies, uniforms based on current year actuals
MINOR ASSETS	39,100	39,100	9,535	12,428	35,500	(3,600)	-9%	23,072	186%	Estimate for landscaping and deer removal equipment, and computer upgrades
ADVERTISING	4,500	4,500	3,365	9,500	14,000	9,500	211%	4,500	47%	Based on current year actuals
COMMUNICATION		-				-		-		
CELL PHONES & IPADS	13,820	13,820	7,330	13,820	14,320	500	4%	500	4%	Based on current year actuals for Town's employees
REGULAR PHONES	38,000	38,000	35,291	54,000	54,000	16,000	42%	-	0%	Cost for landline, internet and cable
WASTE MANAGEMENT	1,034,080	1,034,080	646,670	1,053,000	1,053,000	18,920	2%	-	0%	Based on Carolina Waste contract
PRINTING	38,750	38,750	18,518	32,750	47,700	8,950	23%	14,950	46%	Based on current year actuals
PROFESSIONAL SERVICES	111,000	111,000	102,032	135,900	141,000	30,000	27%	5,100	4%	Town Attorney and annual audit
CONSULTING	61,500	161,500	87,707	201,530	176,000	14,500	9%	(25,530)	-13%	Estimate for various consulting work , including website design, Duncan Parnell
MAINTENANCE						-		-		Building maint., Island wide landscaping and road maint., and software maint.
SOFTWARE	164,160	164,160	120,184	169,160	170,300	6,140	4%	1,140	1%	
BUILDING & VEHICLES	58,000	73,985	44,526	96,500	80,500	6,515	9%	(16,000)	-17%	
LANDSCAPING	231,000	231,000	201,041	210,209	261,000	30,000	13%	50,791	24%	
INSURANCE	140,556	140,556	131,703	131,703	150,824	10,268	7%	19,121	15%	
TRAVEL & TRAINING	53,300	53,300	19,891	32,497	54,000	700	1%	21,503	66%	Based on current year actuals
RENTALS	41,000	41,000	22,744	41,000	45,000	4,000	10%	4,000	10%	Based on contracts.
TOURISM & RECREATIONS	481,465	481,465	250,101	539,599	556,774	75,309	16%	17,175	3%	
CONTRIBUTIONS	150,000	150,000	-	150,000	150,000	-	0%	-	0%	
CAPITAL OUTLAY	500,000	500,000	64,939	944,172	340,000	(160,000)	-32%	(604,172)	-64%	
OTHER	154,376	154,376	89,054	130,339	159,384	5,008	3%	29,045	22%	Based on current year actuals
CONTINGENCY	20,000	20,000	-	-	100,000	80,000	400%	100,000	NA	
TOTAL EXPENDITURES	6,416,883	6,268,288	3,282,050	7,058,930	6,864,780	462,596	7%	(194,150)	-3%	
ALLOCATION TO SATAX	241,000	241,000	-	236,000	485,000	(241,000)	-100%	(236,000)	-100%	Consolidated amount for various departments
ALLOCATION TO COUNTY ATAX	516,165	511,165	269,951	522,999	537,674	(527,965)	-103%	(539,799)	-103%	Consolidated amount for various departments
ALLOCATION TO LOCAL ATAX	921,059	977,979	110,129	1,103,180	554,939	(977,979)	-100%	(1,103,180)	-100%	Consolidated amount for various departments
ALLOCATION TO HOSPITALITY TAX	458,750	458,750	151,917	601,790	286,750	(458,750)	-100%	(601,790)	-100%	Consolidated amount for various departments
ALLOCATION TO ARTS & CULTURAL EVENTS	82,395	82,395	5,587	16,479	73,538	(82,395)	-100%	(16,479)	-100%	
TOTAL NET EXPENDITURES	4,197,514	3,996,999	2,750,053	4,594,961	4,926,879	2,668,290	67%	(4,594,961)	-100%	
OTHER FINANCING USES/SOURCES:										
TRANSFER TO ARTS & CULTURAL EVENTS	55,460	55,460	-	14,960	118,000	(55,460)	-100%	(14,960)	-100%	
TRANSFER TO CAPITAL FUND	357,916	2,020,181	-	2,020,181	-	(2,020,181)	-100%	(2,020,181)	-100%	
EXCESS OF REVENUES OVER EXPENDITURES	589,045	-	-	-	917,575	-	NA	-	N/A	
TOTAL OTHER FINANCING USES/ SOURCES	1,002,421	2,075,641	-	2,035,141	1,035,575	(2,075,641)	-100%	(2,035,141)	-100%	
TOTAL EXPENDITURES & OTHER USES	\$ 5,199,935	\$ 6,072,640	\$ 2,750,053	\$ 6,630,102	5,962,453	\$ (6,072,640)	-100%	\$ (6,630,102)	-100%	

	2020-2021 Budget	2020-2021 Amended Budget	Actuals thru 1/31/21	Annualized 2020-2021	2021-2022 Proposed Budget	FY 21 Budget \$ Change	FY 21 Budget % Change	FY 21 Projections \$ Change	FY 21 Projections % Change	Justifications/Notes
Department: 40200 - ADMINISTRATION										
<u>TOWN ADMINISTRATION</u>										
SALARIES - REGULAR EMPLOYEES	\$ 187,958	\$ 187,958	\$ 108,554	\$ 184,196	249,625	\$ 61,667	33%	\$ 65,428	36%	Salaries for Town Administrator, clerk plus 5% total salaries increase
OVERTIME	1,200	1,200	21	100	1,200	-	0%	1,100	1100%	
SALARIES - TEMPORARY	10,000	10,000	-	-	-	(10,000)	-100%	-	NA	
BONUS	5,000	5,000	5,000	5,000	5,000	-	0%	-	0%	
EMPLOYEE BENEFITS	8,000	8,000	7,812	7,812	18,000	10,000	125%	10,188	130%	\$5K Christmas Gifts, \$3K annually EAP Cost, Employee Appreciation Events - \$10K
INSURANCE - MEDICAL	10,745	10,745	9,920	10,572	10,783	38	0%	211	2%	
FICA ER MATCH	14,835	14,835	8,085	14,835	19,230	4,395	30%	4,395	30%	
RETIREMENT MATCH	40,422	42,422	15,367	35,917	47,628	5,206	12%	11,711	33%	
WORKERS COMPENSATION COSTS	30,000	30,000	21,994	21,994	30,000	-	0%	8,006	36%	
CATERING COSTS	30,000	30,000	10,255	10,255	20,000	(10,000)	-33%	9,745	95%	Christmas Dinner - \$20K Town Attorney - \$90K + \$10K additional legal services not covered under Town Attorney contract, Town Prosecutor - \$10K, \$5K misc professional services
PROFESSIONAL SERVICES	85,000	85,000	76,132	110,000	115,000	30,000	35%	5,000	5%	Other consultant work - \$10K
CONSULTANTS	15,000	15,000	44,830	56,080	10,000	(5,000)	-33%	(46,080)	-82%	Based on cost for 1 cell phone , iPads and mifi
TELEPHONE-CELL	2,400	2,400	1,649	2,400	2,400	-	0%	-	0%	Estimate SCAPA, ICMA,SCCCMA (Stephanie T)
TRAVEL & TRAINING	12,000	12,000	2,239	5,000	12,000	-	0%	7,000	140%	Estimate SCAPA, ICMA, SCCCMA, ULI (Stephanie T) & training for Petra (Clerk Institute)
DUES	4,000	4,000	3,463	4,000	4,000	-	0%	-	0%	Based on current year actuals
SUBSCRIPTIONS	1,000	1,000	306	1,000	1,000	-	0%	-	0%	Estimate for advertising
ADVERTISING COSTS	4,000	4,000	3,365	4,000	4,000	-	0%	-	0%	Disaster Awareness Day - \$7K, Volunteer Appreciation Event - \$7K; and \$5K other community activities
COMMUNITY ACTIVITIES	19,000	19,000	2,336	5,000	19,000	-	0%	14,000	280%	Charitable contributions
COMMUNITY OUTREACH	150,000	150,000	-	150,000	150,000	-	0%	-	0%	Based on current year actuals
SUPPLIES - OFFICE	15,000	15,000	3,745	15,000	15,000	-	0%	-	0%	Estimate for coffee supplies, water, pop, medicine supply, and misc.
SUPPLIES - OTHER	15,000	15,000	13,465	15,000	15,000	-	0%	-	0%	Muni code
BOOKS & PERIODICALS	2,000	2,000	1,559	2,000	2,000	-	0%	-	0%	Include Medicare cost
MISCELLANEOUS EXPEND	15,000	15,000	10,267	15,000	15,000	-	0%	-	0%	
COMPUTER & SOFTWARE MINOR	5,500	5,500	2,151	3,000	5,000	(500)	-9%	2,000	67%	
	<u>683,059</u>	<u>685,059</u>	<u>352,515</u>	<u>678,161</u>	<u>770,865</u>	<u>85,806</u>	<u>13%</u>	<u>92,705</u>	<u>14%</u>	
<u>COUNCIL DEPARTMENT</u>										
SALARIES	-	12,000	2,982	12,000	24,000	12,000	100%	12,000	100%	
RENTAL FACILITIES & MEETING COST	1,000	1,000	881	1,000	5,000	4,000	400%	4,000	400%	
TRAVEL & TRAINING	4,000	4,000	4,220	5,000	4,000	-	0%	(1,000)	-20%	Mainly HLAD and MASC Annual Meeting
SUPPLIES - OFFICE	1,000	1,000	400	1,000	1,000	-	0%	-	0%	Town Council Retreat Expense
	<u>6,000</u>	<u>18,000</u>	<u>8,483</u>	<u>19,000</u>	<u>34,000</u>	<u>16,000</u>	<u>89%</u>	<u>(19,000)</u>	<u>-100%</u>	
TOTAL ADMINISTRATION	<u>\$ 689,059</u>	<u>\$ 703,059</u>	<u>\$ 360,998</u>	<u>\$ 697,161</u>	<u>\$ 804,865</u>	<u>\$ 101,806</u>	<u>14%</u>	<u>(697,161)</u>	<u>-100%</u>	

TOWN OF KIAWAH ISLAND

GENERAL FUND

	2020-2021	2020-2021	Actuals thru	Annualized	2021-2022	FY 21 Budget	FY 21	FY 21	FY 21	
	Budget	Amended Budget	1/31/21	2020-2021	Proposed Budget	\$ Change	Budget	Projections	Projections	Justifications/Notes
							% Change	\$ Change	% Change	
Department: 40100 - ENVIRONMENTAL										
SALARIES - REGULAR EMPLOYEES	\$ 164,337	\$ 164,337	\$ 88,134	\$ 165,440	162,940	\$ (1,397)	-1%	\$ (2,500)	-2%	Salaries for Town's biologist and an assistant
SALARIES - TEMPORARY	-	-	-	-	4,000	4,000	NA	4,000	NA	P/T help with deer surveys
FICA ER MATCH	12,381	12,381	6,369	12,381	12,465	84	1%	84	1%	
INSURANCE - MEDICAL	28,244	28,244	18,541	26,756	27,291	(953)	-3%	535	2%	
RETIREMENT MATCH	28,182	30,182	18,231	30,333	29,983	(199)	-1%	(350)	-1%	
PROFESSIONAL SERVICES	20,000	20,000	-	20,000	16,000	(4,000)	-20%	(4,000)	-20%	Deer Processing
CONSULTANTS	-	-	-	-	30,000	30,000	NA	30,000	NA	Marsh mangment plan
TELEPHONE-CELL	3,000	3,000	1,718	3,000	3,000	-	0%	-	0%	Based on cost for 2 cell phones and 2 iPad
REPAIR AND MAINTENANCE - SOFTWARE	3,000	3,000	104	3,000	4,000	1,000	33%	1,000	33%	ArcGIS, Adobe
DUES	500	500	10	500	500	-	0%	-	0%	
SUBSCRIPTIONS	500	500	199	500	1,000	500	100%	500	100%	
TRAVEL & TRAINING	2,200	2,200	714	-	3,500	1,300	59%	3,500	NA	
TURTLE PATROL EXPENDITURES	7,000	7,000	2,325	6,000	6,000	(1,000)	-14%	-	0%	
BEACH MONITORING & REPAIRS	50,000	50,000	16,177	40,000	50,000	-	0%	10,000	25%	CSE Contract
RESEARCH	37,700	37,700	26,339	37,000	94,100	56,400	150%	57,100	154%	Bobcat GPS, Bird Banding, Toxicology, \$50k for Clemson SGA project
COMMUNITY OUTREACH	3,500	3,500	-	2,500	3,000	(500)	-14%	500	20%	School groups and OWLS
PROGRAMS	7,000	23,400	10,631	23,400	20,000	(3,400)	-15%	(3,400)	-15%	Grow Native, Dolphin Stewardship, Bluebird Boxes
KI CONSERVANCY	49,000	49,000	59,907	98,000	50,000	1,000	2%	(48,000)	-49%	Projects TBD
FISH STUDIES & EQUIPMENT	5,000	5,000	-	2,000	4,000	(1,000)	-20%	2,000	100%	Tissue Testing, Pond Stocking
POND MANAGEMENT	5,000	5,000	1,070	5,000	5,000	-	0%	-	0%	KICA Pond Maintenance contract, herbicide control
SUPPLIES - OFFICE	200	200	85	600	600	400	200%	-	0%	
SUPPLIES OTHER	1,000	1,000	488	500	1,000	-	0%	500	100%	
UNIFORMS	900	900	874	900	1,200	300	33%	300	33%	
BOOKS & PERIODICALS	300	300	-	150	300	-	0%	150	100%	
EQUIPMENT - MINOR	15,000	15,000	-	1,500	4,000	(11,000)	-73%	2,500	167%	Deer removal equipment
COMPUTER & SOFTWARE - MINOR	1,500	1,500	756	800	1,000	(500)	-33%	200	25%	
TOTAL DEPARTMENT EXPENDITURES	445,444	463,844	252,672	480,260	534,879	71,036	15%	54,620	11%	
ALLOCATION TO LOCAL ATAX:	145,386	148,086	81,090	146,946	145,608					
ALLOCATION TO LOCAL ATAX:										
60% OF SALARIES, PR TAXES, AND BENEFIT	138,386	141,086	78,765	140,946	139,608					
TURTLE PATROL COST	7,000	7,000	2,325	6,000	6,000					
	145,386	148,086	81,090	146,946	145,608					
ALLOCATION TO COUNTY ATAX	148,700	148,700	113,054	205,400	218,100					
ALLOCATION TO COUNTY ATAX										
RESEARCH	37,700	37,700	26,339	37,000	94,100					
BEACH MONITORING & REPAIRS	50,000	50,000	16,177	40,000	50,000					
KI CONSERVANCY	49,000	49,000	59,907	98,000	50,000					
PROGRAMS	7,000	7,000	10,631	23,400	20,000					
FISH STUDIES & EQUIPMENT	5,000	5,000	-	2,000	4,000					
POND MANAGEMENT	5,000	5,000	1,070	5,000	5,000					
	153,700	153,700	114,124	205,400	223,100					
TOTAL NET EXPENDITURES	\$ 146,357	\$ 162,057	\$ 57,458	\$ 127,914	\$ 166,172	\$ 4,114	3%	\$ 38,258	30%	

TOWN OF KIAWAH ISLAND
BUDGET DRAFT FOR YEAR ENDED 6/30/22
GENERAL FUND

	2020-2021 Budget	2020-2021 Amended Budget	Actuals thru 1/31/21	Annualized 2020-2021	2021-2022 Proposed Budget	FY 21 Budget \$ Change	FY 21 Budget % Change	FY 21 Projections \$ Change	FY 21 Projections % Change	Justifications/Notes
Department: 40300 - FINANCE										
SALARIES - REGULAR EMPLOYEES	\$ 270,715	\$ 270,715	\$ 152,450	\$ 271,965	265,715	\$ (5,000)	-2%	\$ (6,250)	-2%	Salaries for the treasurer, 2 accountants, STR clerk and receptionist
OVERTIME	1,300	1,300	1,624	2,000	2,000	700	54%	-	0%	
INSURANCE - MEDICAL	35,612	35,612	16,890	34,918	35,617	5	0%	698	2%	
FICA ER MATCH	20,008	20,008	9,035	20,795	20,327	320	2%	(468)	-2%	
RETIREMENT MATCH	45,775	47,775	25,495	51,002	56,002	8,227	17%	5,000	10%	
AUDITING COSTS	26,000	26,000	25,900	25,900	26,000	-	0%	100	0%	Based on the contract
CONSULTANTS	12,500	12,500	5,975	6,000	6,000	(6,500)	-52%	-	0%	Estimate for investment analysis, actuarial evaluation and legal cost
TELEPHONE-CELL	1,000	1,000	875	1,500	1,000	-	0%	(500)	-33%	Based on current year actuals -1 cell phone
REPAIR AND MAINTENANCE - SOFTWARE	150,000	150,000	113,008	155,000	155,000	5,000	3%	-	0%	Cost for ADP-\$48K, Incode10- \$33K, Integral Solution-\$53K , VC3 web hosting-\$1K, citizenserve -\$20K
TRAVEL & TRAINING	8,000	8,000	1,330	5,000	8,000	-	0%	3,000	60%	Estimate for registration fees and travel to attend conferences and courses
DUES	500	500	760	1,000	1,000	500	100%	-	0%	Cost for membership to MASC and GFOA
PRINTING COSTS	9,000	9,000	5,480	6,000	6,000	(3,000)	-33%	-	0%	Printing for utility billing and business license applications and decals
SUPPLIES - OFFICE	4,000	4,000	3,406	4,000	4,000	-	0%	-	0%	Based on current year actuals
SUPPLIES - POSTAGE	8,000	8,000	3,832	8,000	8,000	-	0%	-	0%	Postage for day to day business, business license and utility billing mailing, magnets for renters-\$2.5K
SUPPLIES - OTHER	1,500	1,500	1,315	1,500	1,500	-	0%	-	0%	Based on current year actuals
BOOKS & PERIODICALS	500	500	185	500	500	-	0%	-	0%	Estimate for periodicals
BANK COSTS	35,000	35,000	38,067	55,000	55,000	20,000	57%	-	0%	Cost for WF cc terminals, bank fees & check processing -\$25K,merchant fees-\$30K (Increase related to increase in credit card fees, majority of transactions are done on line now)
COMPUTER & SOFTWARE - MINOR	2,000	2,000	1,211	1,211	2,000	-	0%	789	65%	Placeholder if someone needs new pc
MISCELLANEOUS EXPEND	1,000	1,000	183	500	1,000	-	0%	500	100%	Dropbox, Log me in
TOTAL DEPARTMENT EXPENDITURES	632,409	634,409	407,021	651,791	654,661	20,252	3%	2,869	0%	
ALLOCATION TO COURT DEPARTMENT	18,444	18,444	9,677	18,964	18,763	319	2%	(201)	-1%	30% of Salaries, payroll taxes and benefits for finance clerk allocated to the Court Department
TOTAL NET EXPENDITURES	\$ 613,965	\$ 615,965	\$ 397,344	\$ 632,827	\$ 635,897	\$ 19,932	3%	\$ 3,070	0%	

TOWN OF KIAWAH ISLAND

GENERAL FUND

	2020-2021	2020-2021	Actuals thru	Annualized	2021-2022	FY 21 Budget	FY 21	FY 21	FY 21	
	Budget	Amended Budget	1/31/21	2020-2021	Proposed Budget	\$ Change	Budget	Projections	Projections	Justifications/Notes
							% Change	\$ Change	% Change	
Department: 40500 - COMMUNICATIONS										
SALARIES - REGULAR EMPLOYEES	\$ 120,860	\$ 120,860	\$ 72,669	\$ 123,020	120,520	\$ (340)	0%	(2,500)	-2%	Salaries for Communication Specialist and Assistant
OVERTIME	500	500	9	20	500	-	0%	480	2400%	
SALARIES_TEMPORARY	-	-	-	-	2,500	2,500	NA	2,500	NA	Stipend for social media contributor.
INSURANCE - MEDICAL	13,853	13,853	8,327	13,074	13,335	(517)	-4%	261	2%	
FICA ER MATCH	9,055	9,055	4,582	9,220	9,055	0	0%	(165)	-2%	
RETIREMENT MATCH	18,547	19,547	6,671	20,568	20,218	671	3%	(350)	-2%	
TELEPHONE-CELL	720	720	681	720	720	-	0%	-	0%	Cost for 1 cell phone/\$60 per month
CONSULTANTS	-	100,000	-	30,000	70,000	(30,000)	-30%	40,000	133%	Website redesign in FY21
REPAIR AND MAINTENANCE - SOFTWARE	10,860	10,860	7,072	10,860	11,000	140	1%	140	1%	Adobe creative suite-\$1199.76. Constant contact membership is a fluctuating fee based on # of emails monthly, number of contacts and number of events hosted. (Based on the last 12 months of usage \$2300 Web QA Online Business Directory -\$3500 annually, Amazon annual media hosting for website-\$300, TownApp software annual maint-\$3,000, Survey Monkey Subscription -\$720
PUBLISHING & PROMOTIONS	8,000	8,000	1,411	5,000	9,000	1,000	13%	4,000	80%	Artwork iStock 150 credit package-\$1250, Facebook Campaigns-\$400, P&C Beach Publication advertising-\$1200, Grammarly-\$360 Promotional
MARKETING	-	-	-	-	500	500	NA	500	NA	Video/Printing Projects-Est. \$6,000
PRINTING - TOWN NOTES	21,750	21,750	11,627	21,750	32,700	10,950	50%	10,950	50%	Turtle Patrol /Shorebird stewardship public education materials
TRAVEL & TRAINING	3,600	3,600	149	1,997	3,000	(600)	-17%	1,003	50%	Newsletter & Envelope Printing, mailing servicesfor Town Notes (\$5,550 per quarter totaling \$22,200 annually), Graphic Design Assistance from printer-
SUPPLIES - OFFICE	800	800	634	800	800	-	0%	-	0%	\$4,000 annually, Digital publishing software Joomla\$ -\$950 annually
MISCELLANEOUS EXPEND	1,000	1,000	-	-	1,000	-	0%	1,000	NA	Professional organization memberships and continuing education platforms
TOTAL DEPARTMENT EXPENDITURES	209,544	310,544	113,832	237,029	294,849	(15,695)	-5%	57,820	24%	Estimate for office supplies
ALLOCATION TO ARTS & CULTURAL FUND	82,395	82,395	5,587	16,479	73,538	(8,857)	-11%	57,059	346%	
TOTAL NET EXPENDITURES	127,149	228,149	108,245	220,550	221,311	(6,838)	-3%	761	0%	75% of Salaries, payroll taxes and benefits of Communication Assistant and 25% Communication Specialist
Department: 40600 - COURT DEPARTMENT										
SALARIES - JUDGE	-	2,000	333	2,000	4,000	2,000	100%	2,000	100%	Judge's stipend
SALARIES - REGULAR EMPLOYEES	13,661	13,661	6,803	14,181	13,963	302	2%	(218)	-2%	30% of Sherry's salary
INSURANCE - MEDICAL	1,612	1,612	797	1,612	1,586	(26)	-2%	(26)	-2%	
FICA ER MATCH	1,045	1,045	595	1,045	1,068	23	2%	23	2%	
RETIREMENT MATCH	2,126	2,126	952	2,126	2,147	21	1%	21	1%	
TELEPHONE-CELL	1,200	1,200	-	1,200	1,200	-	0%	-	0%	Cost for 1 cell phone
TRAVEL & TRAINING	1,500	1,500	-	500	1,500	-	0%	1,000	200%	Estimate for registration fees and travel to attend conferences for the Judge
DUES	120	120	65	120	120	-	0%	-	0%	Based on current year actuals
SUPPLIES-OFFICE	300	300	1,927	2,500	300	-	0%	(2,200)	-86%	
	\$ 21,564	\$ 23,564	\$ 11,472	\$ 25,284	\$ 25,883	\$ 2,320	10%	\$ 600	2%	

TOWN OF KIAWAH ISLAND
BUDGET DRAFT FOR YEAR ENDED 6/30/22
GENERAL FUND

	2020-2021 Budget	2020-2021 Amended Budget	Actuals thru 1/31/21	Annualized 2020-2021	2021-2022 Proposed Budget	FY 21 Budget \$ Change	FY 21 Budget % Change	FY 21 Projections \$ Change	FY 21 Projections % Change	Justifications/Notes
Department: 40900 - PUBLIC SAFETY DEPARTMENT										
SALARIES - DEPUTIES	\$ 324,841	\$ 324,841	\$ 202,309	\$ 324,841	324,841	\$ (0)	0%	\$ -	0%	Based on the current contract for 2nd and 3rd shift -80% coverage
OVERTIME	20,000	20,000	18,107	20,000	20,000	-	0%	-	0%	
FICA ER MATCH	32,437	32,437	16,652	32,437	32,437	-	0%	-	0%	
RETIREMENT MATCH	61,736	61,736	37,051	61,736	62,353	617	1%	617	1%	1% increase in PEBA's contribution rates
COUNTY DEPUTY VEHICLE FEES	9,000	9,000	6,020	9,000	9,000	-	0%	-	0%	Based on current contract -\$10 per deputy per shift
COUNTY RADIO COSTS	6,156	6,156	5,092	8,664	8,664	2,508	41%	-	0%	
CCSO CONTRACT	345,880	345,880	244,758	345,880	356,624	10,744	3%	10,744	3%	1st shift is contracted with CCSO (4 deputies)
TOTAL DEPARTMENT EXPENDITURES	800,050	800,050	529,989	802,558	813,919	13,869	2%	11,361	1%	
ALLOCATION TO STATE ATAX	191,000	191,000	-	186,000	385,000	194,000	102%	199,000	107%	Assuming same level of funding as in FY19
ALLOCATION TO LOCAL ATAX	489,043	489,043	-	496,174	306,831	(182,211)	-37%	(189,343)	-38%	Assuming same funding level from SATAX/ 85% of public safety cost allocated to SATAX and LATAX
TOTAL NET EXPENDITURES	120,008	120,008	529,989	120,384	122,088	2,080	2%	1,704	1%	
Department: 40800 - PUBLIC WORKS										
SALARIES	43,250	43,250	28,250	44,124	77,874	34,624	80%	33,750	76%	Salary for 2 employees
INSURANCE - MEDICAL	11,170	11,170	7,676	13,775	24,726	13,556	121%	10,950	79%	
FICA ER MATCH	3,213	3,213	2,124	3,213	3,280	67	2%	67	2%	
RETIREMENT MATCH	7,185	8,185	5,289	7,700	13,496	5,311	65%	5,796	75%	
TELEPHONE-CELL	1,500	1,500	358	1,000	2,000	500	33%	1,000	100%	2 cell phones
TRAVEL & TRAINING	8,000	8,000	357	1,000	8,000	-	0%	7,000	700%	Accounting for training events and joining organizationsfor new Public Works manager
VEHICLE	-	-	-	-	50,000	50,000	NA	50,000	NA	Vehicle for PW assistant
SUPPLIES - OFFICE	2,400	2,400	-	500	1,000	(1,400)	-58%	500	100%	
UNIFORMS	800	800	168	300	1,000	200	25%	700	233%	
COMPUTER & SOFTWARE - MINOR	-	-	-	-	1,500	1,500	NA	1,500	NA	PC for PW Assistant
	\$ 77,518	\$ 78,518	\$ 44,222	\$ 71,612	\$ 182,875	\$ 104,357	133%	111,263	155%	

TOWN OF KIAWAH ISLAND
BUDGET DRAFT FOR YEAR ENDED 6/30/22
GENERAL FUND

	2020-2021 Budget	2020-2021 Amended Budget	Actuals thru 1/31/21	Annualized 2020-2021	2021-2022 Proposed Budget	FY 21 Budget \$ Change	FY 21 Budget % Change	FY 21 Projections \$ Change	FY 21 Projections % Change	Justifications/Notes
Department: 41500 - COMMUNITY DEVELOPMENT SERVICES										
SALARIES	\$ 476,021	\$ 476,021	\$ 309,719	\$ 488,571	479,821	\$ 3,800	1%	\$ (8,750)	-2%	Salaries for Community Dev. Services- 7 employees
OVERTIME	500	500	323	500	500	-	0%	-	0%	
SALARIES_TEMPORARY	-	-	-	-	12,000	12,000	NA	12,000	NA	Intern for John T
INSURANCE - MEDICAL	49,202	49,202	32,525	47,611	48,563	(639)	-1%	952	2%	
FICA ER MATCH	36,052	36,052	23,127	36,706	36,706	654	2%	-	0%	
RETIREMENT MATCH	78,440	80,440	41,716	83,343	88,343	7,903	10%	5,000	6%	
ADVERTISING COSTS	500	500	-	500	500	-	0%	-	0%	Estimate for P&C advertising
STENOGRAPHER COST	5,000	5,000	3,079	5,000	6,000	1,000	20%	1,000	20%	Estimate for BZA meetings
PROFESSIONAL SERVICES	9,000	9,000	13,829	15,000	15,000	6,000	67%	-	0%	Duncan & Parnell document services
CONSULTING	-	-	-	13,000	13,000	13,000	NA	-	0%	Possibility of structural consultants to be used on Parcel 13 project and Senior Living Facility
REPAIR AND MAINT - SOFTWARE	300	300	-	300	300	-	0%	-	0%	Estimate for Adobe pro, MS Office software for computers
TELEPHONE-CELL	4,000	4,000	2,049	4,000	4,000	-	0%	-	0%	Cost for 5 cell phones
DUES	2,500	2,500	1,301	2,500	2,500	-	0%	-	0%	Certification renewals
TRAVEL & TRAINING	14,000	14,000	10,882	14,000	14,000	-	0%	-	0%	Estimate for registration fees and travel to attend conferences and courses
SUPPLIES - OFFICE	2,200	2,200	1,675	2,200	2,200	-	0%	-	0%	Including departmental copies, and supplies
SUPPLIES - OTHER	1,000	1,000	287	1,000	1,000	-	0%	-	0%	Based on current year actuals
UNIFORMS	2,000	2,000	-	2,000	2,000	-	0%	-	0%	7-staff members uniforms
MISCELLANEOUS	2,000	2,000	269	2,000	2,000	-	0%	-	0%	Plate and registration check
VEHICLES	-	-	-	-	40,000	40,000	N/A	40,000	NA	To replace Building Official vehicle
EQUIPMENT MINOR	500	500	-	500	500	-	0%	-	0%	
COMPUTER & SOFTWARE - MINOR	4,600	4,600	5,417	5,417	1,500	(3,100)	-67%	(3,917)	-72%	
	<u>\$ 687,815</u>	<u>\$ 689,815</u>	<u>\$ 446,198</u>	<u>\$ 724,148</u>	<u>\$ 770,433</u>	<u>\$ 80,619</u>	<u>12%</u>	<u>46,285</u>	<u>6%</u>	

TOWN OF KIAWAH ISLAND
BUDGET DRAFT FOR YEAR ENDED 6/30/22
GENERAL FUND

	2020-2021 Budget	2020-2021 Amended Budget	Actuals thru 1/31/21	Annualized 2020-2021	2021-2022 Proposed Budget	FY 21 Budget \$ Change	FY 21 Budget % Change	FY 21 Projections \$ Change	FY 21 Projections % Change	Justifications/Notes
Department: 41000 - OPERATIONS										
WATER & SEWAGE	\$ 110,343	\$ 110,343	\$ 37,084	\$ 100,000	100,000	\$ (10,343)	-9%	\$ -	0%	Based on CY projections
SOLID WASTE DISPOSAL	979,200	979,200	612,299	1,000,000	1,000,000	20,800	2%	-	0%	Contract with CW (beach excluded), Chas recycling fee-\$35k plus \$10k misc.
CUSTODIAL COSTS	20,000	20,000	17,977	27,000	27,000	7,000	35%	-	0%	Office cleaning contract , monthly cleaning supplies-3.6K, windows cleaning -\$2.4k, misc-\$4K
LANDSCAPING COSTS - MINOR	205,000	205,000	126,454	200,000	250,000	45,000	22%	50,000	25%	Based on the Greenery contract \$183K , and misc projects/repairs-17K plus \$50k place holder for MC landscaping
STR CODE ENFORCEMENT	288,580	288,580	232,237	299,018	288,580	-	0%	(10,438)	-3%	Based on the contract with Island Services for after hours code enforcement
BEACH PATROL COSTS	320,765	320,765	133,652	325,699	327,674	6,909	2%	1,975	1%	Based on the contract with Island Services
BEACH UPKEEP	54,880	54,880	34,371	53,000	53,000	(1,880)	-3%	-	0%	Based on the contract with Carolina Waste , plus \$10k misc cleanup
RECYCLING CENTER	-	-	-	11,250	-	-	NA	(11,250)	-100%	LS3P contract-\$11.5K in current year
GARAGE RENOVATIONS	-	-	-	-	150,000	150,000	NA	150,000	NA	\$150k place holder for garage renovations
REPAIR & MAINT - BUILDING	15,000	30,985	13,673	47,000	25,000	(5,985)	-19%	(22,000)	-47%	HVAC, generator annual service
REPAIR & MAINT - VEHICLES	18,000	18,000	7,444	16,000	22,000	4,000	22%	6,000	38%	We have a few older vehicles that may need more maintenance
REPAIR AND MAINT - EQUIPMENT	5,000	5,000	5,432	6,500	6,500	1,500	30%	-	0%	Misc equipment repairs
PEST CONTROL COSTS	5,800	5,800	2,219	5,800	5,800	-	0%	-	0%	Pest and mosquito control and termite bond
RENTAL - EQUIPMENT	40,000	40,000	21,863	40,000	40,000	-	0%	-	0%	Estimate for copier leases , based on current year actuals
INSURANCE - VEHICLES	7,078	7,078	7,078	7,078	8,278	1,200	17%	1,200	17%	Additional vehicle for the PW aassistant
INSURANCE - DATA PRO	546	546	546	546	546	-	0%	-	0%	Same as CY
INSURANCE - LIAB/TOR	43,793	43,793	43,923	43,923	45,000	1,207	3%	1,077	2%	Adding new employee to the policy
INSURANCE - BUILDING & PERSONAL PROPER	14,290	14,290	14,290	14,290	20,000	5,710	40%	5,710	40%	Increase for to recent appraisal and additional recycling facility
INSURANCE - D&O	34,849	34,849	35,064	35,064	37,000	2,152	6%	1,936	6%	Estimated increase of 6%
TELEPHONE - REGULAR	26,000	26,000	28,607	42,000	42,000	16,000	62%	-	0%	Contract for phone service (SEGRA)-\$32K, internet and cable (Comcast) -\$8.1K and back up internet-ATT-\$2.7k
EMERGENCY COMMUNICATION COST	12,000	12,000	6,684	12,000	12,000	-	0%	-	0%	Monthly charges for satellite phones and Code Red
SECURITY SYSTEM COSTS	5,800	5,800	5,345	8,000	5,800	-	0%	(2,200)	-28%	Estimate for building and surveillance cameras
SUPPLIES - OFFICE	3,000	3,000	250	3,000	3,000	-	0%	-	0%	Based on current year actuals
SUPPLIES - OTHER	4,000	4,000	3,221	4,000	4,000	-	0%	-	0%	Based on current year actuals
CHRISTMAS DECORATIONS	11,000	11,000	10,209	10,209	11,000	-	0%	791	8%	Based on Actuals/Will need more decorations Xmas 2021
ELECTRICITY COSTS	50,000	50,000	18,856	50,000	50,000	-	0%	-	0%	Based on CY projections
SIGNS - MINOR COSTS	2,000	2,000	561	2,000	2,000	-	0%	-	0%	Misc repairs to signs
EQUIPMENT	10,000	76,544	328	76,544	20,000	(56,544)	-74%	(56,544)	-74%	Accounting for computer upgrades for FY2022-\$10k and landscaping equipment-\$10k
	<u>2,286,924</u>	<u>2,369,453</u>	<u>1,419,667</u>	<u>2,439,921</u>	<u>2,556,178</u>	<u>186,726</u>	<u>8%</u>	<u>116,257</u>	<u>5%</u>	
ALLOCATION TO STATE ATAX	50,000	50,000	-	50,000	100,000	50,000	100%	50,000	100%	Assuming same funding level as in FY19 for the Beach Patrol
ALLOCATION TO COUNTY ATAX	362,465	362,465	156,897	317,599	319,574	(42,891)	-12%	1,975	1%	
ALLOCATION TO LOCAL ATAX	54,880	109,100	29,039	55,250	53,000	(56,100)	-51%	(2,250)	-4%	Beach upkeep
ALLOCATION TO HOSPITALITY ATAX	242,750	242,750	151,917	241,959	242,750	-	0%	791	0%	
TOTAL NET EXPENDITURES	<u>\$ 1,576,829</u>	<u>\$ 1,605,137</u>	<u>\$ 1,081,814</u>	<u>\$ 1,775,113</u>	<u>\$ 1,840,854</u>	<u>\$ (48,991)</u>	<u>-3%</u>	<u>\$ 50,516</u>	<u>3%</u>	

	2020-2021 Budget	2020-2021 Amended Budget	Actuals thru 1/31/21	Annualized 2020-2021	2021-2022 Proposed Budget	FY 21 Budget \$ Change	FY 21 Budget % Change	FY 21 Projections \$ Change	FY 21 Projections % Change	Justifications/Notes
Department: 40400 - ROADS AND BRIDGE										
REPAIR AND MAINT ROADS	\$ 15,000	\$ 15,000	\$ 64,378	\$ 314,378	100,000	\$ 85,000	567%	\$ (214,378)	-68%	Place holder for work on Beachwalker
PKWY LANDSCAPING	500,000	500,000	-	540,000	-	(500,000)	-100%	(540,000)	-100%	Landscaping finished in FY21
GENERAL INSURANCE - BRIDGE	40,000	40,000	37,880	37,880	40,000	-	0%	2,120	6%	Estimate for bridge insurance -6% increase
PROFESSIONAL SERVICES	-	-	19,994	45,200	10,000	10,000	NA	(35,200)	-78%	Place holder for work on Beachwalker
MISCELLANEOUS EXPEND	<u>1,000</u>	<u>1,000</u>	<u>993</u>	<u>1,000</u>	<u>1,000</u>	<u>-</u>	<u>0%</u>	<u>-</u>	<u>0%</u>	Estimate for misc.
	<u>556,000</u>	<u>556,000</u>	<u>123,245</u>	<u>938,458</u>	<u>151,000</u>	<u>(405,000)</u>	<u>-73%</u>	<u>(787,458)</u>	<u>-84%</u>	
ALLOCATION TO LOCAL ATAX	231,750	231,750	-	404,810	49,500	(182,250)	-79%	(355,310)	-88%	Allocate 45%
ALLOCATION TO HOSPITALITY TAX	<u>216,000</u>	<u>216,000</u>	<u>-</u>	<u>359,831</u>	<u>44,000</u>	<u>(172,000)</u>	<u>-80%</u>	<u>(315,831)</u>	<u>-88%</u>	Allocate 40%
TOTAL NET EXPENDITURES	<u>\$ 108,250</u>	<u>\$ 108,250</u>	<u>\$ 123,245</u>	<u>\$ 173,817</u>	<u>57,500</u>	<u>\$ (50,750)</u>	<u>-47%</u>	<u>\$ (116,317)</u>	<u>-67%</u>	
Department: 41400 - CERT TEAM										
CERT TEAM	<u>3,000</u>	<u>3,000</u>	<u>2,356</u>	<u>3,000</u>	<u>3,000</u>	<u>-</u>	<u>0%</u>	<u>-</u>	<u>0%</u>	
	<u>\$ 3,000</u>	<u>\$ 3,000</u>	<u>\$ 2,356</u>	<u>\$ 3,000</u>	<u>\$ 3,000</u>	<u>-</u>	<u>0%</u>	<u>-</u>	<u>0%</u>	

TOWN OF KIAWAH ISLAND
BUDGET DRAFT FOR YEAR ENDED 6/30/22
STATE ACCOMMODATION TAX FUND

	2020-2021 Budget	2020-2021 Amended Budget	Actuals thru 1/31/21	Annualized 2020-2021	2021-2022 Proposed Budget	FY 21 Budget \$ Change	FY 21 Budget % Change	FY 21 Projections \$ Change	FY 21 Projections % Change	Justifications/Notes
STATE ACCOMMODATIONS TAX REVENUE	\$ 1,271,025	\$ 1,271,025	\$ 1,140,087	\$ 1,867,363	\$ 1,532,505	\$ 261,480	21%	\$ (334,858)	-18%	Based on FY2019 actuals
INTEREST REVENUE	<u>2,500</u>	<u>2,500</u>	<u>1,519</u>	<u>2,000</u>	<u>2,000</u>	<u>(2,500)</u>	<u>-100%</u>	<u>-</u>	<u>0%</u>	Rate of return -0.05%
	1,273,525	1,273,525	1,140,087	1,869,363	1,534,505	258,980	21%	(334,858)	-18%	
EXPENDITURES:										
PROMOTIONAL FUND	381,307	381,307	369,370	560,209	459,751	78,444	21%	(100,457)	-18%	30% of SATAX
SATAX CURRENT YEAR FUNDING	<u>730,000</u>	<u>730,000</u>	<u>360,000</u>	<u>730,000</u>	<u>1,531,432</u>	<u>801,432</u>	<u>110%</u>	<u>801,432</u>	<u>110%</u>	
TOTAL STATE ACCOMMODATION TAX EXPENDITURE	1,111,307	1,111,307	729,370	1,290,209	1,991,183	879,876	79%	700,974	54%	
NET INCREASE/(DECREASE) IN FUND BALANCE	<u>\$ 162,218</u>	<u>\$ 162,218</u>	<u>\$ 410,717</u>	<u>\$ 579,154</u>	<u>\$ (456,679)</u>	<u>\$ (620,896)</u>	<u>-383%</u>	<u>\$ (1,035,833)</u>	<u>-179%</u>	

TOWN OF KIAWAH ISLAND
BUDGET DRAFT FOR YEAR ENDED 6/30/22
COUNTY ACCOMMODATION TAX FUND

	2020-2021 Budget	2020-2021 Amended Budget	Actuals thru 1/31/21	Annualized 2020-2021	2021-2022 Proposed Budget	FY 21 Budget \$ Change	FY 21 Budget % Change	FY 21 Projections \$ Change	FY 21 Projections % Change	Justifications/Notes
REVENUES:										
COUNTY ACCOMMODATION TAX	\$ -	\$ -	\$ -	\$ -	\$ 200,000	\$ 200,000	NA	\$ 200,000	NA	
INTEREST REVENUE	20,000	10,000	3,038	5,000	5,000	(5,000)	-50%	-	0%	Rate of return -0.05%
TOTAL CATAX REVENUES	20,000	10,000	3,038	5,000	205,000	195,000	1950%	200,000	4000%	
EXPENDITURES :										
WATER & SEWAGE	25,000	25,000	1,176	20,000	20,000	(5,000)	-20%	-	0%	allocation from GF
SOLID WASTE DISPOSAL	25,000	25,000	6,093	25,000	25,000	-	0%	-	0%	allocation from GF
CUSTODIAL COSTS	5,000	5,000	-	5,000	5,000	-	0%	-	0%	allocation from GF
LANDSCAPING COSTS - MINOR	20,000	20,000	3,250	20,000	20,000	-	0%	-	0%	allocation from GF
REPAIR & MAINT - BUILDING	1,000	1,000	1,200	1,000	1,000	-	0%	-	0%	allocation from GF
PEST CONTROL COSTS	500	500	320	500	500	-	0%	-	0%	allocation from GF
TELEPHONE - REGULAR	5,200	5,200	-	5,200	5,200	-	0%	-	0%	allocation from GF
SECURITY SYSTEM COSTS	200	200	-	200	200	-	0%	-	0%	allocation from GF
BEACH PATROL COSTS	320,765	320,765	-	325,699	327,674	6,909	2%	1,975	1%	
BEACH MONITORING & REPAIRS	50,000	50,000	8,733	40,000	50,000	-	0%	10,000	25%	Beach Mitigation, Annual beach survey and report (CSE)
KI CONSERVANCY	49,000	49,000	-	98,000	50,000	1,000	2%	(48,000)	-49%	
ENVIRONMENTAL RESEARCH	37,700	37,700	29,781	37,000	94,100	56,400	150%	57,100	154%	Bobcat GPS, Bird Banding, Toxicology, \$50k for Clemson SGA project
EDUCATIONAL PROGRAMS	7,000	23,400	-	23,400	20,000	(3,400)	-15%	(3,400)	-15%	Grow Native, Dolphin Stewardship, Bluebird Boxes
FISH STUDIES & EQUIPMENT	5,000	5,000	-	2,000	4,000	(1,000)	-20%	2,000	100%	Estimate for fish tissue testing and stocking
POND MANAGEMENT	5,000	5,000	1,010	5,000	5,000	-	0%	-	0%	
ELECTRICITY COSTS	15,000	15,000	11,206	15,000	15,000	-	0%	-	0%	50% allocation from GF
TOTAL CATAX EXPENDITURES	571,365	587,765	207,052	622,999	642,674	54,909	9%	19,675	3%	
FUND ALLOCATIONS TO OTHER FUNDS :										
ALLOCATE FROM SATAX	(50,000)	(50,000)	-	(100,000)	(100,000)	(50,000)	100%	-	0%	Assuming same funding level as in FY19 for the Beach Patrol
TOTAL CATAX FUND EXPEND, ALLOCATIC	521,365	537,765	207,052	522,999	542,674	4,909	1%	19,675	4%	
NET INCREASE/(DECREASE) IN FUND BAL/	\$ (501,365)	\$ (527,765)	\$ (204,014)	\$ (517,999)	\$ (337,674)	\$ 190,091	-36%	\$ 180,325	-35%	

TOWN OF KIAWAH ISLAND
BUDGET DRAFT FOR YEAR ENDED 6/30/22
LOCAL ACCOMMODATION TAX FUND

	2020-2021 Budget	2020-2021 Amended Budget	Actuals thru 1/31/21	Annualized 2020-2021	2021-2022 Proposed Budget	FY 21 Budget \$ Change	FY 21 Budget % Change	FY 21 Projections \$ Change	FY 21 Projections % Change	Justifications/Notes
REVENUES:										
LOCAL ACCOMMODATION TAX	\$ 734,510	\$ 858,938	\$ 618,618	\$ 1,086,685	\$ 986,392	\$ 127,454	15%	\$ (100,293)	-9%	Based on FY2019 actuals
INTEREST REVENUE	<u>60,000</u>	<u>20,000</u>	<u>4,556</u>	<u>6,000</u>	<u>6,000</u>	<u>(14,000)</u>	<u>-70%</u>	<u>-</u>	0%	Rate of return -0.05%
TOTAL LATAX REVENUES	794,510	878,938	623,174	1,092,685	992,392	113,454	13%	(100,293)	-9%	
EXPENDITURES :										
SALARIES - REGULAR EMPLOYEES	97,102	97,102	57,084	99,264	97,764	662	1%	(1,500)	-2%	60% of the biologists payroll
FICA ER MATCH	7,428	7,428	3,821	7,428	7,479	51	1%	51	1%	
INSURANCE - MEDICAL	16,947	16,947	11,125	16,054	16,375	(572)	-3%	321	2%	
RETIREMENT MATCH	16,909	16,909	10,939	18,200	17,990	1,081	6%	(210)	-1%	
DEPUTIES COST	489,043	489,043	325,611	496,174	306,831	(182,211)	-37%	(189,343)	-38%	
BEACH UPKEEP	54,880	54,880	29,039	53,000	53,000	(1,880)	-3%	-	0%	Contract with CW
TURTLE PATROL	7,000	7,000	2,287	6,000	6,000	(1,000)	-14%	-	0%	
RECYCLING CENTER	-	-	-	2,250	-	-	NA	(2,250)	-100%	
EQUIPMENT	-	54,220	-	54,220	-	(54,220)	-100%	(54,220)	-100%	Radios for Beach patrol
BEACH SUPPLIES COSTS	<u>2,500</u>	<u>2,500</u>	<u>-</u>	<u>2,500</u>	<u>2,500</u>	<u>-</u>	<u>0%</u>	<u>-</u>	<u>0%</u>	
TOTAL LATAX EXPENDITURES	691,809	746,029	439,906	755,090	507,939	(238,090)	-32%	(247,151)	-33%	
FUND TRANSFERS AND ALLOCATIONS TO OTHER FUNDS :										
TRANSFER TO ARTS & CULTURAL FUND	188,335	188,335	168,335	53,783	236,538	48,203	26%	182,755	340%	
TRANSFER TO GENERAL FUND	231,750	231,750	-	404,810	49,500	(182,250)	-79%	(355,310)	-88%	Transfer to GF for 45% cost of Beachwalker Dr improvements
TRANSFER TO CAPITAL FUND	<u>293,804</u>	<u>293,804</u>	<u>-</u>	<u>434,674</u>	<u>394,557</u>	<u>100,753</u>	<u>34%</u>	<u>(40,117)</u>	<u>-9%</u>	Future Beach Renurishment -20% of LATAX revenue, Emergency Fund-20%
TOTAL LATAX FUND EXPEND, TRANSFERS & ALLOC	1,405,698	1,459,918	608,241	1,648,357	1,188,534	(271,384)	-19%	(212,672)	-13%	
NET INCREASE/(DECREASE) IN FUND BALANCE	\$ (611,188)	\$ (580,980)	\$ 14,933	\$ (555,672)	\$ (196,142)	\$ 384,839	-66%	\$ 1,085,424	-195%	

	2020-2021 Budget	2020-2021 Amended Budget	Actuals thru 1/31/21	Annualized 2020-2021	2021-2022 Proposed Budget	FY 21 Budget \$ Change	FY 21 Budget % Change	FY 21 Projections \$ Change	FY 21 Projections % Change	Justifications/Notes
REVENUES:										
BEVERAGE TAX REVENUE	\$ 45,000	\$ 45,000	\$ 3,000	\$ 45,000	\$ 45,000	\$ -	0%	\$ -	0%	\$3k per alcoholic beverage permit (15 entities)
	45,000	45,000	-	45,000	45,000	-	0%	-	0%	
FUND TRANSFERS TO OTHER FUNDS :										
TRANSFER TO CAPITAL FUND	50,000	50,000	-	50,000	50,000	-	0%	-	0%	
	50,000	50,000	-	50,000	50,000	-	0%	-	0%	
NET INCREASE/(DECREASE) IN FUND BAL	\$ (5,000)	\$ (5,000)	\$ -	\$ (5,000)	\$ (5,000)	\$ -	\$ -	\$ -	\$ -	

	2020-2021 Budget	2020-2021 Amended Budget	Actuals thru 1/31/21	Annualized 2020-2021	2021-2022 Proposed Budget	FY 21 Budget \$ Change	FY 21 Budget % Change	FY 21 Projections \$ Change	FY 21 Projections % Change	Justifications/Notes
REVENUES:										
HOSPITALITY TAX	\$ 411,357	\$ 457,985	\$ 263,378	\$ 508,925	\$ 576,884	\$ 118,899	26%	\$ 67,959	13%	Based on FY2019 actuals
INTEREST REVENUE	50,000	30,000	4,557	6,000	6,000	(24,000)	-80%	-	0%	Rate of return -0.05%
TOTAL HOSPITALITY TAX REVENUES	461,357	487,985	267,935	514,925	582,884	94,899	19%	67,959	13%	
EXPENDITURES :										
WATER & SEWAGE	88,750	88,750	33,858	88,750	88,750	-	0%	-	0%	Irrigation for KI Parkway, round a bout, Beachwalker Dr and Betsy Kerri son Parkway
LANDSCAPING COSTS - MINOR	140,000	140,000	106,691	140,000	140,000	-	0%	-	0%	Contract for maintenance of KI Parkway, round a bout, Beach walker Dr and Betsy Kerrison Parkway
CHRISTMAS DECORATIONS	11,000	11,000	10,209	10,209	11,000	-	0%	791	8%	Estimate for Christmas decorations
ELECTRICITY COSTS	3,000	3,000	1,159	3,000	3,000	-	0%	-	0%	Electricity for round a bout lights
TOTAL EXPENDITURES	242,750	242,750	151,917	241,959	242,750	-	0%	791	0%	
FUND TRANSFERS TO OTHER FUNDS :										
TRANSFER TO ARTS & CULTURAL FUND	10,120	10,120	10,120	8,020	22,000	11,880	117%	13,980	174%	
TRANSFER TO GENERAL FUND	216,000	216,000	-	359,831	44,000	(172,000)	N/A	(315,831)	-88%	Transfer to GF for 40% cost of Beachwalker Dr improvements
TRANSFER TO CAPITAL FUND	164,543	164,543	-	203,570	230,754	66,211	40%	27,184	13%	20% of Hospitality tax revenue for future projects on tourism related infrastructure , 20% -Emergency Fund
TOTAL HOSPITALITY FUND EXPEND & TRAN	633,413	633,413	162,037	813,380	539,504	(93,909)	-15%	(273,877)	-34%	
NET INCREASE/(DECREASE) IN FUND BALAN	\$ (172,056)	\$ (145,428)	\$ 105,898	\$ (298,455)	\$ 43,380	\$ 188,808	-130%	\$ 341,836	-115%	

TOWN OF KIAWAH ISLAND
BUDGET DRAFT FOR YEAR ENDED 6/30/22
ARTS & CULTURAL FUND

	2020-2021 Budget	2020-2021 Amended Budget	Actuals thru 1/31/21	Annualized 2020-2021	2021-2022 Proposed Budget	FY 21 Budget \$ Change	FY 21 Budget % Change	FY 21 Projections \$ Change	FY 21 Projections % Change	Justifications/Notes
SOURCES :										
TRANSFER FROM LATAX FUND	\$ 178,215	\$ 178,215	\$ -	\$ 53,783	\$ 236,538	\$ 58,323	33%	\$ 182,755	340%	
TRANSFER FROM HOSPITALITY TAX FUND	10,120	10,120		8,020	22,000	11,880	117%	13,980	174%	
TRANSFER FROM GENERAL FUND	<u>55,460</u>	<u>55,460</u>	<u>-</u>	<u>14,960</u>	<u>118,000</u>	<u>62,540</u>	<u>113%</u>	<u>103,040</u>	<u>689%</u>	
TOTAL SOURCES	243,795	243,795	-	76,763	376,538	132,743	54%	299,775	391%	
EXPENDITURES:										
PAYROLL & RELATED EXPENSES	82,395	82,395	-	16,479	73,538	(8,857)	-11%	57,059	346%	
OFFICE/PRINTING EXPENSES	3,000	3,000	-	-	3,000	-	0%	3,000	#DIV/0!	
ARTS COUNCIL	52,460	52,460	6,000	13,400	115,000	62,540	119%	101,600	758%	
ADMINISTRATIVE COST	3,000	3,000	560	1,560	3,000	-	0%	1,440	92%	
CULTURAL EVENTS	<u>102,940</u>	<u>102,940</u>	<u>16,750</u>	<u>45,324</u>	<u>182,000</u>	<u>79,060</u>	<u>77%</u>	<u>136,676</u>	<u>302%</u>	
TOTAL EXPENDITURES	243,795	243,795	23,310	76,763	376,538	132,743	196%	299,775	1152%	
NET INCREASE/(DECREASE) IN FUND BALANCE	<u>\$ -</u>	<u>\$ -</u>	<u>\$ (23,310)</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ -</u>	<u>0%</u>	<u>\$ -</u>	<u>0%</u>	

TOWN OF KIAWAH ISLAND
BUDGET DRAFT FOR YEAR ENDED 6/30/22
VICTIMS ASSISTANCE FUND

	2020-2021 Budget	2020-2021 Amended Budget	Actuals thru 1/31/21	Annualized 2020-2021	2021-2022 Proposed Budget	FY 21 Budget \$ Change	FY 21 Budget % Change	FY 21 Projections \$ Change	FY 21 Projections % Change	Justifications/Notes
SOURCES :										
VICTIMS ASSISTANCE FEES	10,000	10,000	8,468	10,000	10,000	10,000	0%	-	0%	
TOTAL SOURCES	10,000	10,000	8,468	10,000	10,000	10,000	0%	-	0%	
EXPENDITURES:										
CONTRIBUTIONS TO VICTIMS PROGRAMS	10,000	10,000	7,645	10,000	10,000	10,000	100%	-	0%	
TOTAL EXPENDITURES	10,000	10,000	7,645	10,000	10,000	10,000	100%	-	0%	
NET INCREASE/(DECREASE) IN FUND BALANCE	\$ -	\$ -	\$ 823	\$ -	\$ -	\$ -	-100%	\$ -	0%	

TOWN OF KIAWAH ISLAND
BUDGET DRAFT FOR YEAR ENDED 6/30/22
CAPITAL & EMERGENCY FUND

	2020-2021 Budget	2020-2021 Amended Budget	Annualized 2020-2021	2021-2022 Proposed Budget	FY 21 Budget \$ Change	FY 21 Budget % Change	FY 21 Projections \$ Change	FY 21 Projections % Change	Justifications/Notes
REVENUES & SOURCES :									
TRANSFER FROM GENERAL FUND	\$ 357,916	\$ 2,025,916	\$ 2,020,181	\$ -	\$ (2,025,916)	-100%	\$ (2,020,181)	-100%	
TRANSFER FROM LOCAL ACCOMMODATION FUND	293,804	293,804	434,674	394,557	100,753	34%	(40,117)	-9%	
TRANSFER FROM BEVERAGE FUND	50,000	50,000	50,000	50,000	-	0%	-	0%	
TRANSFER FROM HOSPITALITY TAX FUND	164,543	164,543	203,570	230,754	66,211	40%	27,184	13%	
INTEREST	<u>30,000</u>	<u>30,000</u>	<u>5,000</u>	<u>5,000</u>	<u>(25,000)</u>	<u>-83%</u>	<u>-</u>	<u>0%</u>	
TOTAL REVENUES & SOURCES	896,263	2,564,263	2,713,425	680,310	(1,883,953)	-73%	(2,033,114)	-75%	
EXPENDITURES:									
DEBT SERVICE/PRINCIPAL	333,333	2,001,333	2,001,000	-	(2,001,333)	-100%	(2,001,000)	-100%	
DEBT SERVICE/ INTEREST	<u>24,583</u>	<u>24,583</u>	<u>19,181</u>	<u>-</u>	<u>(24,583)</u>	<u>-100%</u>	<u>(19,181)</u>	<u>-100%</u>	
TOTAL EXPENDITURES	357,916	- 2,025,916	- 2,020,181	- -	(2,025,916)	-100%	(2,020,181)	-100%	
NET INCREASE/(DECREASE) IN FUND BALANCE	<u>\$ 538,347</u>	<u>\$ 538,347</u>	<u>\$ 693,244</u>	<u>\$ 680,310</u>	<u>\$ 141,963</u>	<u>26%</u>	<u>\$ (12,933)</u>	<u>-2%</u>	

Town of Kiawah Island
Five Year Capital Improvements Plan

<u>Capital Expenditures</u>	<u>Annualized FY2021</u>	<u>Budget FY2022</u>	<u>Projected FY2023</u>	<u>Projected FY2024</u>	<u>Projected FY2025</u>	<u>Projected FY2026</u>
Beach Renourishment	-	-	-	-	-	1,000,000
Wet Trash/Recycling Center	11,250	-	-	-	-	-
KI Parkway Resurfacing	314,378	-	-	-	-	-
KI Parkway Landscape Design	25,000	-	-	-	-	-
KI Parkway Landscaping	540,000	-	-	-	-	-
Safety Improvements on Beachwalker Drive	16,500	100,000	-	-	-	-
Municipal Center Landscaping	-	50,000	-	-	-	-
Municipal Center Garage/Car Wash Station		150,000	-	-	-	-
Vehicles						
· Administration	-		-	45,000	-	-
· Building Department	-	40,000	-	-	-	40,000
· Code Enforcement	-	-	-	40,000	50,000	-
· Public Works	-	50,000	-	-	-	-
· Wildlife/Turtle Patrol	-	-	40,000	-	40,000	-
Total Capital Expenditures	\$ 907,128	\$ 390,000	\$ 40,000	\$ 85,000	\$ 90,000	\$ 1,040,000