

**PROFESSIONAL SERVICE AGREEMENT BETWEEN
THE CITY OF WEST ALLIS, WI
AND
CARLSON DETTMANN CONSULTING, LLC**

This professional service agreement (hereinafter the "Agreement") is made and entered into by and between the City of West Allis, WI, a municipal corporation (hereinafter "Client"), and Carlson Dettmann Consulting, LLC, a Wisconsin limited-liability company (hereinafter "Consultant").

WHEREAS, Client wishes to enter into an agreement with Consultant to provide professional consulting services for an assessment of the Client's classification and compensation levels in the information technology area; and

WHEREAS, Client is considering expanding the scope of this limited study to cover all of its approximately 265 job classifications, including job analysis and evaluation, a market analysis for wages in comparable jobs in the Client's competitive market, and design of a new salary plan; and

WHEREAS, Consultant has an established history of providing similar services to Wisconsin municipal employers and is willing to provide the above-referenced professional consulting services to the Client.

THEREFORE, the Client and Consultant agree to the following:

1. Term. The term of this Agreement shall be from the date of the last signature of this Agreement until all services are completed. The parties agree the goal is to begin this project by July 1 and complete this project no later than November 30, 2016.
2. Scope of Services. The Consultant shall provide to the Client consulting services as follows:

Option A – Information Technology Position Study and Overall Project Scope Development

- a) Consultant will assist Client with documentation of the job content of each information technology job using Consultant's Job Description Questionnaire (JDQ).
- b) Consultant will administer its Point Factor Job Evaluation System to construct a relative ranking of jobs.
- c) Consultant will produce a new classification and compensation plan for Client's information technology classifications that will internally equitable and competitive in external markets both public and private.
- d) Consultant will review all subject jobs and properly classify those jobs in accordance with current Fair Labor Standards Act provisions relative to exempt and non-exempt status.
- e) Consultant will work through the required policy questions with Client for a complete study of the classification and compensation plan covering all other Client employees, excluding unionized protective service staff.

- f) Consultant will present, in person, the final results of the classification and compensation study to the designated committee of the Common Council and to the subsequent meeting(s) of the Common Council.

Option B – Comprehensive Classification and Compensation Plan Development

- a) Consultant will complete all items specified above (a-f) for all of Client's 265 job classifications.
- b) Consultant will review current job documentation for those positions with multiple levels, develop a framework for establishing a classification series for key City positions, facilitate conversations with key department leaders with the goal of establishing said classification series, and provide classification series recommendations to the City.
- c) Consultant will develop a high-level overall assessment of the competitiveness of Client's total rewards program, particularly regarding employer-provided insurances (including contribution levels), retirement, premium pay, awards program(s), mandatory benefits, and paid time off.
- d) Consultant will review Client policies related to these items and make recommendations for policy modifications as appropriate.
- e) Upon completion of the study, Consultant will make recommendations to the Common Council as it relates to the appropriate compensation package for the City Administrator.

3. Fees.

Option A: Client shall pay the Consultant a project price of \$12,750 with half the fee payable upon signing of this Agreement, and the balance paid upon Consultant's submission of its draft report of findings and recommendations which will occur no later than November 30, 2016.

Option B: Client shall pay Consultant a professional fee of \$92,750 to conduct the full study for up to 265 job classifications to be paid in increments as follows:

- \$20,000 upon signing of the Agreement
- \$10,000 in the second month of the project
- \$10,000 in the third month of the project
- \$10,000 in the fourth month of the project
- \$10,000 in the fifth month of the project
- \$32,750 balance due on January 6, 2017

Consultant's final recommendations will be made no later than one hundred eighty (180) days following the initial project meeting.

Client also shall reimburse Consultant for travel expenses related to either or both projects.

Client shall: (1) designate one employee per classification to complete a JDQ for that classification; (2) give any employee who feels their job is unique an opportunity to

complete a separate JDQ; and (3) with Consultant's assistance, review all submitted JDQ's to determine the specific number to be evaluated.

Consultant shall conduct job evaluations on all positions Client determines shall be evaluated, including those that are unique. Accordingly, Consultant's fee shall be adjusted by \$250 per job evaluation over or under the 265 classification evaluations upon which the project fee was based. Any additional fees or credit resulting from the classification count will be reflected on the final invoice.

The project fee does not cover any employee appeal process to be determined by mutual agreement between Client and Consultant prior to conclusion of the study.

The project fee covers:

1. Project orientation sessions for staff.
2. In addition to the orientation sessions addressed in 1. above: Under Option A, up to four (4) days of Consultant onsite meetings to complete the items set forth in a – d, as applicable, below. Under Option B, up to ten (10) days of Consultant onsite meetings to include, but not limited to:
 - a. Project kick-off meeting with project management team.
 - b. Meetings necessary to facilitate the development of the appropriate classification series.
 - c. Periodic progress meetings with the Client's project team.
 - d. Management (i.e. department head) interviews to determine organizational structure, any unique characteristics, projected turnover, anticipated organizational changes, and any perceived compensation and classification issues.
 - e. Presentations to the appropriate policy committee and the Common Council.
 - i. At least one of the meetings will be dedicated to reviewing pay plan options with City leadership and obtaining guidance on the preferred policies for market benchmarking, market positioning, and pay structure, including how employees progress through a new pay plan.
3. Job analysis and application of the Carlson Dettmann Consulting Point Factor Job Evaluation System.
4. Market data collection and analysis.
 - a. Provide a cost overview of the Client's benefits programs, recommending changes in policies that Consultant believes are in the Client's interests.
 - b. Review gross earnings data and overtime pay policies to identify any areas where internal compression is an issue and recommend remedies as appropriate.
5. Development of a pay plan structure and grade order list with implementation recommendations.
6. Implementation costing estimates. *(Note: The Consultant's costing estimate should not be a substitute for a detailed fiscal note presented to the Common Council. The*

Consultant's estimates are based on a fixed point in time, and are not reflective of any vacancies, turnover, or newly created positions during the course of a study.)

7. Development of supporting policies and procedures, as well as any recommendations for future plan maintenance.
8. Review of the City Administrator's compensation package and development of recommendations upon completion of the other project steps.

All work required by Client outside this scope shall be according to Consultant's hourly rates unless specifically agreed upon otherwise. Such additional services include, but are not limited to, locating records or otherwise responding to public records requests made to the Client relating to the project. In addition, Consultant shall be available to handle appeals for a fee to be determined subsequently by Client and Consultant.

If Client elects Option A, Client shall have option at the conclusion of that project to elect moving on to Option B, and the project fee for Option A shall be credited toward the fee for Option B. However, the 150-day time line for Option B shall begin when Client and Consultant sign the portion of this agreement for that portion of the project.

4. Performance Requirements of Consultant. The Consultant shall complete the services as stated above. The Consultant shall furnish all labor, materials, administration, services, supplies, equipment, transportation, and quality control necessary to provide professional consulting services. Consultant shall provide progress reports upon request by the Client.
5. Performance Requirements of Client. Client shall provide and make available to the Consultant access to its human resources and related systems of record, or relevant data, as necessary to fulfill said services. It is imperative that the data provided by the Client be complete and accurate to ensure that the Consultant's analysis is also complete and accurate.
6. Trade Secrets. The Carlson Dettmann Point Factor Job Evaluation System and methodology, marketplace surveys performed, and job point evaluation data collected and analyzed to perform the Scope of Services is owned by Consultant, is confidential and proprietary, and is a trade secret pursuant to Wis. Stats. s. 134.90. Client (including its officers, employees, agents and representatives) shall not disclose, disseminate, or otherwise misappropriate these trade secrets without the express consent of Consultant or court order.
7. Independent Contractor. It is mutually understood and agreed, and it is the intent of the parties hereto, that an independent contractor relationship be and is hereby established under the terms and conditions of this Agreement. The Consultant shall remain an independent contractor under this Agreement. All employees of Consultant or subcontractors shall remain the responsibility of the Consultant and shall not become employees of the Client under this Agreement. No tenure or any rights or benefits, including worker's compensation, unemployment insurance, medical care, sick leave, vacation leave, severance pay, withholding taxes or other benefits available to Client employees shall accrue to the Consultant or its employees performing services under this Agreement.

8. Indemnification. The Consultant agrees it shall defend, indemnify, and hold harmless the Client, its officers and agents against damages arising from or relating to intentional misconduct of the Consultant, its members, employees and agents. Client agrees it shall defend, indemnify, and hold harmless the Consultant, its members, employees, and agents against damages arising from or relating to intentional misconduct of the Client, its officers and agents.
9. Applicable Law. This Agreement shall be governed by and construed in accordance with the laws of the State of Wisconsin in effect on the date of this Agreement.
10. Assignment. Neither party to this Agreement may assign or transfer this Agreement, or any part thereof, without the written consent of the other party.
11. Severability. If any provision of this Agreement is held to be illegal, invalid or unenforceable, such provision shall be fully severable and this Agreement shall be construed and enforced as if such illegal, invalid or unenforceable provision had never comprised a part of the Agreement. The remaining provisions shall remain in full force and effect and shall not be affected by the illegal, invalid or unenforceable provision or by its severance.
12. Binding Effect. This Agreement shall extend to and be binding upon and inure to the benefit of the parties.
13. Entire Agreement. This Agreement sets forth the entire understanding of the parties and supersedes all prior arrangements and/or understandings, whether written or oral, with respect to the subject matter contained in this Agreement. No terms, conditions, warranties, other than those contained herein, and no amendments or modifications hereto shall be binding unless made in writing and signed by Client and the Consultant.

Option A Approved:

Charles E. Carlson, Partner
Carlson Dettmann Consulting, LLC

Dated:

City Administrator
City of West Allis, WI

Dated:

Option B Approved:


Charles E. Carlson (Jun 6, 2016)

Charles E. Carlson, Partner


Rebecca Grill (Jun 15, 2016)

Rebecca Grill

City Administrator

Carlson Dettmann Consulting, LLC

Dated: Jun 6, 2016

City of West Allis, WI

Dated: Jun 15, 2016