



April 2, 2012

Ms. Jean Premutati, PHR
Management Services Administrator
Marina Coast Water District
11 Reservation Road
Marina, CA 93933

Dear Ms. Premutati:

Enclosed is our proposal in response to the Marina Coast Water District RFP (request for proposals) to provide comprehensive compensation and classification services, as outlined.

CSI Human Resources Group is a woman-owned and local business established in 2006. We are a consortium comprised of highly qualified individuals providing outstanding human resource services to local special districts, jurisdictions, and private entities. We possess the experience and expertise necessary to provide excellent, actionable results to your organization. Our philosophy and our practice is to serve as a strategic partner to our clients and in so doing provide them with unparalleled service.

Our mission is to construct an integrated resource that encourages dialogue and collaboration with our clientele. CSI offers a comprehensive set of services which maximize the return on your investment with us.

On behalf of the CSI team, we thank you for your consideration.

Sincerely,

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

Michael T. Alliman, SPHR
President & CEO



Marina Coast Water District Proposal for Services

Comprehensive Compensation and Classification Study

Attention:
Jean Premutati, PHR
Management Services Administrator

April 2, 2012

I. INTRODUCTION

Consulting Services International, LLC, dba CSI Human Resources Group, (CSI) welcomes the opportunity to offer this proposal in response to the RFP prepared by the Marina Coast Water District (MCWD). The CSI Team brings extensive experience with complex projects for the public, private, and non-profit sectors of the Monterey Peninsula region. Relevant projects facilitated by CSI include: recruitment, strategic planning, board retreat facilitation, conducting market analyses and total compensation studies, executive leadership and staff training, day-to-day operational human resources, employee relations, and coaching.

CSI is a locally woman-owned consortium comprised of a team of highly competent professionals with a wide variety of knowledge, skills, and abilities in Human Resources and Finance. We are experts in identifying, developing, and implementing business “best practices” and possess years of experience with successful delivery of client support. Each member of the CSI team performs with the highest quality standards and has a proven track record successfully exceeding client expectations.

II. PURPOSE

CSI understands it is the District’s goal to attract and retain talent commensurate with its mandate. As such it is necessary to undertake a study that not only assures that the District is fairly compensating its incumbents, but is also an attractive alternative to future recruits. CSI will provide accurate, timely information, and recommendations based on a thorough examination of comparable agencies.

This proposal is being submitted to Jean Premutati, Management Services Administrator, for outsourced comprehensive compensation and classification services. This proposal has been developed with the understanding that MCWD has a need for a consultant to provide such services and to work with personnel of the MCWD. This plan will outline the goals and objectives established by MCWD and will benchmark results.

III. REFERENCES

- | | |
|---|---|
| <p>1. Barbara Higuera, Administrative Services
Carmel Area Wastewater District
3945 Rio Road, Carmel
Carmel, CA 93922
(831) 624-1248
<i>Services Provided:</i> Employee Satisfaction Survey, Recruiting, Training</p> | <p>4. Steve Endsley, Assistant Executive Officer
Fort Ord Reuse Authority
920 2nd Ave., Ste. A
Marina, CA 93933
831-883-3672
<i>Services Provided:</i> Recruiting</p> |
| <p>2. Scott Roseman, President
New Leaf Community Market
1121 Pacific Avenue
Santa Cruz, CA 95060
(831) 466-9060
<i>Services Provided:</i> Compensation Study and Gainsharing program</p> | <p>5. Francine Rodd, Executive Director
Manuela Klopfin, Finance/Operations Officer
First 5 Monterey County
1125 Baldwin Street
Salinas, CA 93906
(831) 444-8549
<i>Services Provided:</i> Compensation/Classification study and recommendations.</p> |
| <p>3. Gene Kobayashi, Owner/President
Kuida Ag Supply Company
PO Box 2598
Salinas, CA 93901
831-758-9914
<i>Providing:</i> Ongoing day-to-day Human Resource services</p> | <p>Other references provided upon request.</p> |

IV. WORK PLAN & PROPOSED COST (SCOPE OF SERVICES)

PROJECT SCOPE	ESTIMATED HOURS	TIMELINE END DATE
A. Classification Study <ol style="list-style-type: none"> 1. Meet with District Manager and Management Services Administrator/Human Resources to discuss project scope and establish comparable market 2. Review the District's existing classification system 3. Establish survey instrument 4. Gather data from comparable agencies (<i>based on 10 entities in order to determine proposal estimate</i>) 5. Analyze data 6. Update/create new job descriptions (<i>3 hours per job description – 22 estimated classifications based on RFP</i>) 7. Ascertain correct FLSA status (<i>as outlined above</i>) 8. Analyze organizational chart 9. Make recommendations as to the appropriateness of the current staffing level (grade) of the positions based on CSI's understanding of the work performed in the job positions. 10. Work with Management Services Administrator to establish "Career Ladders" showing how selected personnel can move through a career by acquiring additional knowledge and skills through education, training, or work experience. 	<p>2 - 3</p> <p>6 - 8</p> <p>4 - 6</p> <p>8 - 10</p> <p>15 - 20</p> <p>40 - 66</p> <p>8 - 10</p> <p>3 - 5</p> <p>4 - 6</p> <p>45 - 50</p>	<p>4/20</p> <p>5/4</p> <p>5/11</p> <p>5/18</p> <p>6/1</p> <p>6/8</p> <p>6/22</p> <p>6/22</p> <p>6/22</p> <p>6/29</p>
B. Compensation Study <ol style="list-style-type: none"> 1. Work with Management Services Administrator to identify market comparables 2. Establish salary ranges based on market data including minimum, midpoint, and maximum 3. Analyze positions based on survey results and propose reclassification if warranted, and compare internal equity 4. Prepare a cost analysis for incumbents in positions below the minimum (<i>based on 10 positions in order to determine proposal estimate</i>). 5. Prepare written report including findings and recommend implementation strategies 	<p><i>As outlined in A-1 above</i></p> <p><i>As outlined in A-6</i></p> <p>8 - 10</p> <p>8 - 10</p> <p>1 - 3</p>	<p>4/20</p> <p>6/1</p> <p>6/22</p> <p>6/22</p> <p>6/22</p>
C. Wrap-up Meet with client and/or Board for oral report of findings	<p>2</p>	<p>7/6</p>

Estimated Hours = 154-209 Total Estimated Cost = \$23,100 - \$31,350

V. RATES AND TERMS

All services outlined above will be conducted at an hourly rate of \$150.00, and will be tracked in ¼ hour increments. The hours outlined for this proposal are estimates based on the input received by the client. MCWD will be invoiced at the end of each month for that month's services and are due and payable upon receipt. The scope of work outlined in this proposal is not to exceed the total amount of **\$31,350** unless agreed to in writing by both parties.

VI. QUALIFICATIONS

CSI Associate Beth Ingram will serve as lead liaison and Valerie Lucchesi-Elliott will serve as technical expert. Michael Alliman will serve in an advisory role for the MCWD project.



President and CEO Michael Alliman is a nationally certified Senior Professional in Human Resources (“SPHR”) and an expert in Finance and Accounting. Mr. Alliman has held various “C”- level positions in his 20+ years of his professional life serving as CEO, CFO and COO. His experience includes responsibility for all financial aspects of a \$200MM company including financial reporting and oversight, cash management, bank reporting and regulatory compliance. His time in industry and consulting for the department of defense, has given him a keen eye for hiring the right candidate using various assessments and metrics. He has a background in developing systems to streamline operations and improve efficiencies. In addition to his fiscal background Mr. Alliman is an accomplished strategic facilitator, educator, and business coach. He holds a Master of Accountancy, University of Tennessee, Knoxville, TN and a BA Accounting, Baylor University, Waco, TX.



Beth Ingram, BA
Beth Ingram has over 15 years of experience in Human Resources serving small and large organizations. She has experience as a Recruiter, HR Generalist and Benefits Administrator. She has been a successful consultant to various organizations including Carmel Area Wastewater District assisting in recruitments for Administrative and Operational personnel including recent Principal Accountant position when Barbara Buikema was selected to serve in the role as General Manager. While managing the benefits team for a public company with 5000 employees nationwide, Ms. Ingram gained invaluable benefits and generalist experience. Ms. Ingram is the lead Associate at CSI currently serving both private and public sectors.



Valerie Lucchesi-Elliott, SPHR
Valerie Lucchesi-Elliott is an experienced and enthusiastic professional with 30 years of Human Resources experience. Valerie’s skills have been used to create and successfully manage programs in human resources within both the private and public sectors. Using the process of logically matching human resources programs to the organization’s strategy has proven to be a “win” for both the employer and the employee’s. Valerie has developed and managed compensation, performance management, executive perquisites, benefits, and other related programs in the human resources arena in addition to conducting an annual compensation study for the national utilities industry.



Sharon Rhoads McQueen, MA, PHR
Sharon McQueen, holds a Masters of Arts degree in Organizational Psychology and offers a wide range of experience in organization development, Human Resources administration and operations, program and project management, change management, employee training and development, recruitment and staffing, management coaching and employee relations. She has over seventeen years of contract, internal consulting, and staff roles in human resources and organizational development at companies in Santa Cruz and Monterey Counties, and Silicon Valley including Seagate Technology, 3Com Corporation, AMD, and American Water. Her experience working in various roles combined with managing global and “virtual” teams provides a broad perspective on the many factors impacting organization change and effectiveness.



Berta Torres, SPHR-CA

Berta Torres is a multifaceted professional with over 8 years of HR Generalist experience with an emphasis in operations, administrative human resources functions, as well as workers' compensation. Berta is fluent in Spanish and is an experienced translator. She has advanced technical skills, having spearheaded the build and implementation of a custom HRIS as well as numerous interfaces. She has exceptional organizational skills and has experience in developing HR procedures and workflows, effectively streamlining HR processes and creating efficiencies that are less paper-driven. Berta's background as a legal assistant has served her well in Human Resources as she is capable of researching and interpreting complex laws and regulations. She is an excellent employee/labor relations representative having earned the trust and respect of employees and union representatives for her fair-minded approach to employee issues. Berta's experience includes composing and documenting hundreds of disciplinary actions. Berta is a state of California and nationally certified HR professional holding an SPHR-CA designation and holds an Associate Degree in Behavioral Science. Berta serves as bi-lingual trainer for CSI Human Resources.



Mary Goodby, PHR

Mary is an HR Generalist with an emphasis in the Healthcare industry. She holds a BS Degree from the University of Redlands and has been practicing human resources for over 20 years. Mary's specialties include; healthcare recruitment and retention, employee relations issues, and grievance resolution. In addition to monitoring and investigating employee relations matters, Mary is skilled in compliance, policy and procedure development, and benefit administration. Mary currently resides in Idaho and is working with CSI on special projects.



Dana Marshall, SPHR

Ms. Marshall has over 20 years of management and consulting experience in Organizational Development and Human Resources management. She holds a BA in Psychology from the University of California at Santa Barbara and is certified as a Senior Professional in Human Resources (SPHR). Ms. Marshall's specialties include business development, training and HR consulting, specifically on employee relations issues. Ms Marshall's consulting skills and business acumen have benefited management teams on a variety of human resources issues, including developing goals and objectives, conducting formal needs assessments, and designing and facilitating management teambuilding programs and employee assimilation programs. Some of her previous employers and clients include; Netscape Communications, America Online, Shop.com, Loudcloud Inc., Portal Software, and Visto Corporation. Dana currently serves as HR Manager for Central Coast Senior Services and is Co-Founder of CSI Human Resources. Dana specializes in coaching and training for CSI.



Administrative Manager, Ana O'Donnell, MS

Ms. O'Donnell holds a Masters' degree in engineering from Long Beach State University. Currently Ms. O'Donnell serves as Administrative Manager to the CSI team by providing seamless administrative services including database management, online file maintenance, and ensuring high quality and timely customer service to our clientele.

Owner, Daylene Alliman, SPHR-CA

Daylene holds a Masters' Degree in Organizational Management (MAOM) and a Bachelor of Science Degree in Social Science. She is a certified coach through the Ford Institute, and is a 2004 graduate of Leadership Monterey Peninsula. Daylene has over 20 years of professional experience consulting organizations and currently serves in an advisory role to CSI Human Resources Group. Daylene has developed and managed the human resources and administrative functions in a variety of non-profit, and high-tech start-up environments, as well as initiating business service centers for the County of Monterey. Additionally, she has conducted salary and total compensation surveys on behalf of the Human Resources department under the direction of the Office of the CAO. Daylene recently worked with FORA (Fort Ord Reuse Authority) where she developed the HR infrastructure and managed a competitive classification and salary survey mandated by the Board of Directors. She currently serves as HR Manager for the Monterey Regional Waste Management District. As owner, Daylene serves as principal advisor to the CSI organization.

VII. CONCLUSION

Daylene Alliman and co-founder Dana Marshall launched CSI Human Resources in 2006 with the concept to provide "client-centric" HR Consulting services at a reasonable cost to organizations, compensate associates at a competitive market rate, provide a work environment that values life balance by contributing benefits of wellness, and give back to the community we serve. At CSI, our approach is to strictly monitor and regularly communicate to the client the status of the project's scope, schedule, and budget. Our work is fueled by the continual cycle of dialogue between the client and CSI and providing weekly progress reports based upon the agreed timeline for the project, confirmed at our initial meeting. In the event of changes in the scope of this project should this project require additional time, the client will be notified in writing.

We are pleased to provide this proposal and are available to further discuss any of the information contained herein. We look forward to working with MCWD to assist you with meeting the goals and objectives of the RFP.

Please note: The MCWD standard consulting services agreement was not attached to the request received by CSI however we agree to provide the necessary documentation upon award of the contract.

Consulting Services International, LLC is a consulting organization providing consulting, training, business, and related human resource services to businesses. CSI carry's \$1M in General Liability Insurance. CSI is not engaged in rendering legal, accounting, or other professional services. The consulting services, recommendations, information and materials are designed to be authoritative in regard to the subject matter covered, without implied warranties. The Client is strongly encouraged to consult legal counsel on matters involving employment law. CSI is and shall remain an independent contractor under this agreement and any other agreement for consulting services and no employment relationship is created. Services are provided for the exclusive use of the Client, and may not be sold, given away, or used for any other purpose other than the Client's business or organization.

Actual consulting fees for services are subject to change for services other than those outlined above. In the event of changes in the scope of the above services made by the Client, CSI requests such changes be made in writing. Progress billings for current consulting services will be provided at the end of each month and are due and payable upon receipt. All statements will contain an itemization of hours, fees, and miscellaneous expenses incurred. This agreement may be terminated by the Client upon 1.) Written notice to CSI, and 2) Payment in full for all services performed by CSI to date of termination.