

A photograph of three business professionals in an office setting. On the left, a Black woman with curly hair, wearing a grey blazer over a light blue shirt, is smiling and shaking hands with a man on the right. In the center, a woman with long brown hair, wearing a light blue blazer over a white collared shirt, is also smiling. On the right, a man with grey hair and glasses, wearing a dark suit and tie, is smiling and shaking hands with the woman on the left. The background is a blurred office interior with large windows and columns.

# Comprehensive Wage and Salary Pay Plan Studies

SOQ 22-025

*Jefferson Parish*

June 2, 2022



**Jefferson  
Parish**  
State of Louisiana



**LOCKTON®**

UNCOMMONLY INDEPENDENT



A photograph of two men in business suits standing on a paved plaza, engaged in conversation. They are positioned in front of a large, classical building with a wide set of stone steps. The scene is brightly lit, casting long shadows on the ground. A black rectangular box with a thin white border is overlaid on the upper left portion of the image, containing a quote. The quote is enclosed in large white quotation marks and is flanked by horizontal blue lines.

“  
*Our goal is to become a valued  
business partner that will make  
your business better.*  
”



June 2, 2022

Melissa Ovalle, Buyer  
**Jefferson Parish Purchasing Department**  
**General Government Building**  
200 Derbigny St, Suite 4400  
Gretna, LA 70053

Dear Melissa,

Lockton Dunning Benefits (Lockton) is pleased to present The Jefferson Parish Council (Jefferson Parish) with this statement of qualifications (SOQ) for Comprehensive Wage and Salary Pay Plan Studies. We appreciate the opportunity to participate in this process.

With today's labor market and diverse workforce, it is important to offer competitive and meaningful wages based on the needs of your unique employee population. When analyzing these wages in a specific market like Jefferson Parish, Lockton brings the best of both worlds. Based right here in Metairie, the Lockton team is uniquely positioned to bring the sophisticated advisory resources of a mega public consultant, yet an elevated value-added perspective because of our intimate understanding of the demands and nuances associated with Jefferson Parish. We simply have the experience and expertise to provide valuable insight in a different manner than our national competitors. And we are able to deliver and guarantee a level of personal service that is unsurpassed in the industry.

The depth and breadth of our human resource experience spans both the public and private sector on a global and local scale, and we serve organizations with employees ranging from 300 to over 20,000. As you will see in our proposal, we have included references that include:

- A nonprofit organization with nearly 8,000 employees
- A local municipality, as well as a private organization with 3,600 employees

Additionally, we currently serve as the compensation consultant for the City of Slidell, LA, and the health and welfare consultant for the Jefferson Parish Sheriff, City of Baton Rouge, Lafayette Consolidated Government, and several notable large employers in the regional private sector.

The selection of our specific references was both intentional and representative of our breadth in consulting, as we believe there is value in blending the methodologies used in both the public and private sector — especially when considering the current demand of labor across all industries and the war for talent being seen nationally.

On behalf of the entire team at Lockton, we are excited about the opportunity to partner with Jefferson Parish, and further serve the community in which we work. We believe we are best qualified to assist you with this project, and we look forward to your response and the next steps in this process.

Sincerely,



**Chris Williams**

**Vice President**

Mobile 504.520.0457

Email [chris.williams@lockton.com](mailto:chris.williams@lockton.com)





*Independence changes everything.*

LOCKTON COMPANIES





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# About Lockton

\$2.69B

2022 GLOBAL REVENUE

8,500<sup>+</sup>

ASSOCIATES WORLDWIDE

65,000<sup>+</sup>

CLIENTS WORLDWIDE

100<sup>+</sup>

OFFICES WORLDWIDE

97%

CLIENT RETENTION

27%

ORGANIC GROWTH

13

CONSECUTIVE YEARS AS  
BEST PLACES TO WORK

INDEPENDENCE IS AT THE  
CORE OF WHO LOCKTON IS,  
AND IN OUR INDUSTRY,  
INDEPENDENCE IS UNCOMMON

As the world's largest privately owned, independent insurance brokerage and total rewards consulting firm, Lockton Companies, LLC (Lockton) serves more than 65,000 clients across six continents with human resources, total rewards, and employee benefits consulting in addition to risk management, insurance, and surety services. Lockton's 8,500 Associates are committed to helping clients achieve the goals that make their businesses safer, smarter, and more profitable.

Despite our size, an exceptional level of service remains Lockton's crowning achievement. We embrace our clients' challenges as our own and protect their interests at every turn. That dedication helps us retain 97% of our clients annually, the best record in the business. We focus all our resources to do one thing — serve our clients better. And we embrace our clients' challenges as our own protecting their interests at every turn.

The Lockton Total Rewards Consulting Practice helps employers use all available tools to attract, retain, and motivate employees. Our process for data-driven decision-making and analysis drives human capital costs to their most efficient levels, based on strategy and options. We employ subject matter experts across all facets of total rewards to take a holistic view of clients' total rewards programs versus a traditional siloed approach.





# Executive Summary

The Lockton Total Rewards Consulting Practice offers full-service compensation and total rewards consulting for clients in the nonprofit, private, and public sector industries.

We strive to provide the best professional advice to our clients regarding key human resources issues through our extensive hands-on experience and balanced solutions approach to compensation and total rewards.

Lockton is pleased to provide Jefferson Parish with this statement of qualifications (SOQ) for Comprehensive Wage and Salary Pay Plan Studies. We understand that Jefferson Parish would like to perform a wage and salary analysis affecting approximately 3,000 employees covered by approximately 700 positions. Jefferson Parish strives to structure a classification and pay plan that is externally competitive, internally equitable, and within the financial resources of the Parish.

Our approach will be to evaluate, benchmark, and design a compensation program that supports your business strategy, and craft total rewards programs that are not only calibrated to your business culture, but highly correlated to drive performance.



## OUR COMMITMENT TO CLIENTS

*To provide the most uncommon results  
and service in a most common business.*



## *The Lockton Story*

In 1966, Jack Lockton founded our company with a simple idea — deliver the best service in the industry. In the first 10 years, the business grew steadily to 10 Associates, including Jack’s brother, David. In the decades since, Lockton has become the world’s largest privately owned, independent insurance brokerage and consulting firm by continuing to attract great people and focusing on our purpose: helping make our clients’ businesses better.

Our company has developed its core values and philosophies by valuing partnerships, fostering innovation, maintaining a sense of urgency, and building expertise to meet the changing demands of clients.

Lockton’s proven track record means Jefferson Parish can expect us to perform with the same passion and expertise that we have demonstrated for more than five decades.

### **Best Place to Work**

Lockton focuses on attracting and retaining talented total rewards professionals who deliver extraordinary service for clients. As evidence of the commitment and engagement of our Associates, Lockton has earned the “Best Places to Work in Insurance” award from *Business Insurance* magazine and Best Companies Group for thirteen consecutive years, every year it has been given.

*Business Insurance* launched the “Best Places to Work in Insurance” program to identify and recognize high-quality workplaces in the commercial insurance industry. Companies are honored for creating workplaces that do a superior job of encouraging employees to thrive and love their work. Best Companies Group, an independent workplace excellence research firm, conducted a two-part process with a qualitative assessment of company practices along with a direct survey of Lockton Associates’ attitudes. Lockton earned high marks from Associates in areas such as:

- Leadership and planning
- Client commitment
- Corporate culture and communications
- Role satisfaction and work environment
- Relationship with supervisors
- Training and development



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*Business Insurance* and Best Companies Group conduct independent research to honor companies that create superior workplaces where people thrive.



## Lockton's Philosophy

At Lockton, our clients' needs are our first priority. Because our Associates are not distracted by the demands of outside investors and short-term earnings expectations, we have the freedom to do what's right for our three stakeholders: our clients, our Associates, and the communities in which we do business. We believe success is the natural result of these priorities.

Our company philosophy states that Lockton Companies will:

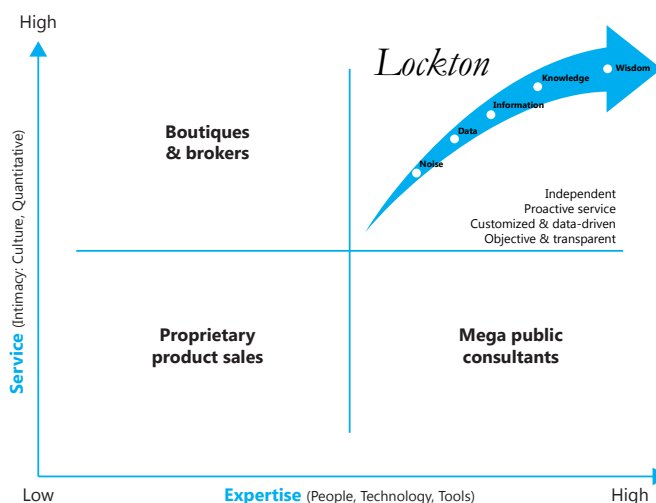
- Be committed to the highest standards of excellence in everything we do.
- Practice the Golden Rule and sustain a highly ethical, moral, and caring culture.
- Recognize our Associates as our most valuable assets.
- Provide opportunity and support to allow all Associates to grow, improve, and achieve their ultimate potential.
- Recognize and substantially reward exemplary Associate performance.
- Respect, value, and nurture each of our client and carrier relationships.
- Be composed of people who demonstrate a passion for delivering unparalleled service — internally and externally.
- Make a recognizable difference to our clients' businesses through innovative solutions to their insurance and organizational needs.
- Be proactive in sustaining a meaningful corporate, social, and civic responsibility.
- Maintain our independence and private ownership.
- Manage our business for consistent and orderly growth.
- Be a fiercely competitive and aggressive sales organization.
- Generate fair and healthy financial returns.

Lockton provides a dedicated service team to each of our clients. Our philosophy translates into a client service experience that combines high-touch service with easily accessible expertise. Our teams function as an extension of our clients' human resources departments, seeking frequent and collaborative interaction.

Lockton is a clear alternative to traditional, boutique, and mega consulting firms. As illustrated to the right, Lockton will provide Jefferson Parish with the right balance: deep resources to meet your employee benefits needs, yet entrepreneurial and responsive enough to derive the best results from a team of experts that delivers exceptional service, whenever and however you need us.

This is the unique Lockton way.

### The Lockton Difference





# *Approach and Methodology*

As organizations grow and undergo change, they are challenged to keep up with the constantly shifting marketplace. Those who adapt quicker often see more success. Evaluating the market can reveal various business trends and provide insights an organization needs to stay competitive versus their peers.

Competitive total compensation is important in Jefferson Parish's efforts to attract, retain, and engage talent. When the economy is strong and unemployment is low, it is important to pay competitive salaries to attract top talent. When the economy isn't as strong, paying competitively to retain your top employees is just as important, as the competition is courting them. Turnover and hiring new employees are time consuming and costly efforts, so retaining your best employees is critical.

Highly valued total rewards programs can become competitive differentiators that make an employer stand out, and these can be highlighted as the employer's "rewards brand."

The implications of not providing market salary and total rewards can be huge. Benchmarking allows employers the analytical foundation to strategically design salary and compensation structures that are not only attractive to employees but also truly support business objectives.

We have organized our approach into five phases to meet the requirements of your statement of qualifications.

## PHASE I: DEVELOP THE PLAN

### **Project Kickoff Meeting**

- We begin with a project kickoff meeting with Jefferson Parish's management team to review the project scope, discuss project expectations, and have an open discussion about your compensation programs.
- This will enable us to gain full context of Jefferson Parish's total rewards programs, organizational structure, and compensation philosophy.
- We will obtain an understanding of your prior compensation strategies, i.e., historical market pricing methodologies, target market, and target market positioning.

### **Data Request**

As a follow-up to our kickoff meeting, we will collect all data and documentation related to the following, and more:

- Strategic objectives
- Organizational structure



- Current compensation plan and programs
- HR, total rewards, and/or compensation philosophy statements
- Compensation Administration Guidelines

### **Project Communication Plan**

- We will schedule weekly or biweekly update meetings for the duration of the project to keep Jefferson Parish informed on our progress.
- We find that most communication can be managed through emails and conference calls, and we will mirror your communication preference.

### **PHASE II: REVIEW EXISTING PAY PLANS**

Your Lockton team of consultants will review and analyze all data and items collected in Phase 1. This assessment will:

- Evaluate if your current compensation programs are aligned with your business objectives.
- Gauge whether your total rewards package drives performance.
- Pinpoint plan design irregularities and inefficiencies.
- Discover gaps in your existing Compensation Administration Guidelines.
- Review existing job descriptions and titles for completeness and accuracy in conjunction with position pay ranges.

### **PHASE III: CONDUCT COMPREHENSIVE BENCHMARK COMPENSATION STUDY**

#### **Study Initiation**

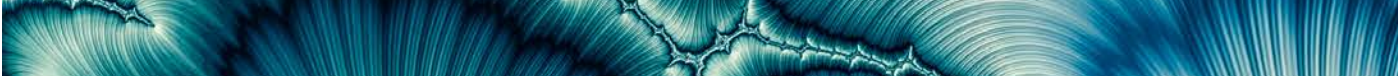
We will:

- Initiate a comprehensive benchmarking exercise and competitive assessment that includes all relevant positions.
  - This will ensure that we understand how your plans compare with whom you compete for talent.
- Work with your project team to confirm all applicable, comparable employers to include in the study, i.e., public sector entities in geographic proximity with similar jobs.
- Recommend using multiple data sources to provide a balanced approach:
  - Up to 10 public sector entities.
  - Up to three published sources of third-party administered salary data.
  - If desired, we will identify and evaluate third-party administered salary survey sources that would be a good fit for your current needs and recommend the best fit solutions to supplement any existing survey data Jefferson Parish may already own.

#### **Survey Collection and Data Validation**

- The survey data collection tool will collect typical information such as:
  - Actual pay rates
  - Salary range information



- 
- Hiring pay practices
  - Step/increase structures
  - Ancillary pay practices (bilingual pay, certifications, performance bonuses, etc.)
  - We validate the data and perform an analysis of the market's 25th, 50th, and 75th percentiles for base pay compensation for each job and your market pay philosophy.
  - We will make every effort to collect data from all organizations invited but cannot guarantee being able to collect data from all.

### **Salary Structure Analysis & Design**

- Our analysis will include a review of geographic pay differentials and determine if the structure should be updated based on your current location of operation.
- We then develop a salary structure with best practice design principles and map the Jefferson Parish jobs to the appropriate salary grade.

### **PHASE IV: ANALYZE DATA AND PREPARE RECOMMENDATIONS**

Lockton will:

- Compare market data and best practices with Jefferson Parish's existing compensation programs and develop a best in class pay plan recommendation that is market competitive, ensures internal equity, is compliant with federal and state labor laws, and within the financial resources of Jefferson Parish.
- Analyze base pay compensation across classified, executive, judicial, and East Bank Consolidated Fire Department positions.
- Identify opportunities to strengthen your competitive positioning in the market, which will ultimately attract new employees, and recommend a refreshed program or policy.
- Provide analysis and recommendations on an individual incumbent's pay within the new salary grades and structure.
- Include recommendations with options for a phased or targeted rollout, as necessary.
- Quantify the fiscal impact of the findings and detail the costs of the recommendations, ensuring recommendations fall within scope of Jefferson Parish's financial resources.
  - We may also note options that merit consideration but fall outside the current scope of financial resources.
- Present our preliminary findings and recommendations to Jefferson Parish's management team and apply your feedback prior to concluding our final report in Phase V.

### **PHASE V: DEVELOP REPORT AND MAKE PRESENTATIONS**

Based on Jefferson Parish's approval and feedback from Phase IV, Lockton will:

- Create an executive summary that reviews and supports our recommendations and a final report that includes all study data.
- Present the report to the necessary groups for approvals.



Below is a proposed workplan utilized with other strategic partners, modified to fit a projected timeline with Jefferson Parish.

<i>Workplan</i>		
<b>Today's Date</b>	6/2/2022	
<b>Client</b>	Jefferson Parish	
<b>Project Overview</b>	Comprehensive Wage and Salary Pay Plan Study	
<i>Task</i>	<i>Approximate Timing</i>	<i>Responsible Party</i>
Project Kickoff		Jefferson Parish/Lockton
Background and Strategy Review	2 weeks	Jefferson Parish/Lockton
Existing Materials Review	2 weeks	Lockton
External Market Compensation Study	10 weeks	
▪ Determine jobs and data coverage		Jefferson Parish/Lockton
▪ Build survey tool		Lockton
▪ Provide invitation contact information		Jefferson Parish
▪ Survey distribution		Lockton
▪ Survey responses collection		Lockton
▪ Submission cleanup and follow-up		Lockton
▪ Market analysis		Lockton
Data Analysis and Recommendations	12 weeks	Lockton
▪ Design salary structure		Lockton
▪ Map jobs to grades		Lockton
▪ Evaluate hierarchical structure		Lockton
▪ Compare employee pay to salary grades		Lockton
▪ Determine implementation approach and timing		Jefferson Parish/Lockton
▪ Create salary administration guidelines		Lockton
Report and Presentations	4 weeks	
▪ Develop final report		Lockton
▪ Present for approval		Lockton



# The Team

**Company Name:** Lockton-Dunning Series of Lockton Companies, LLC

**Address:** 3850 N Causeway Blvd, Lakeway II, Suite 1575, Metairie, LA 70002

**Primary Contact:** Chris Williams, Vice President

**Address:** 3850 N Causeway Blvd, Lakeway II, Suite 1575, Metairie, LA 70002

**Phone:** 504.323.1907

**Email:** chris.williams@lockton.com

At Lockton, it is our people who make the biggest difference. We have compiled a team of professionals with strong compensation experience. Their blend of technical talent, leadership, and industry experience will provide the Parish with the key knowledge and skills needed, as well as the practical experience of corporate professionals. Our team has developed successful total rewards strategies and operated leading compensation functions in comparable corporate environments. Our Compensation Consulting team is well positioned to aid the Parish with these initiatives.

Lockton's Compensation Consulting Practice offers full-service compensation and total rewards consulting for clients in the nonprofit, private, and public sector industries.

Our Compensation Consulting team is comprised of compensation practitioners — not career consultants — whose focus is on designing compensation programs that are easy to implement and manage. Our team has a long history of conducting compensation and classification studies, including one such project for the City of Slidell. We are currently engaged as their outsourced compensation consultant and complete a comprehensive market study for them every other year. We have just wrapped up our second study during our partnership with them.

Our goal is to provide Jefferson Parish with proactive counsel, value-added resources, and superior service to drive your short- and long-term goals. We bring expertise and knowledge in this space to provide Jefferson Parish with top-notch consultation and strategic partnership.



**Chris Williams**

*Vice President, Executive Sponsor*

Chris currently serves as Vice President for Health & Welfare. Chris has nearly a decade of experience intimately overseeing the management of a large, self-insured health plan. A graduate of Tulane University where he obtained his Master of Business Administration in strategic management, Chris gained experience in hospitality, government, construction, and corporate administration. He is uniquely positioned to serve as a strategic adviser in the healthcare and wellness industry for a broad range of businesses. Prior to joining Lockton Dunning Benefits, Chris was a part of Barriere Construction Co. LLC, where he last served as Director of Administration and Employee Development. In the role, he oversaw many administrative functions, including Human Resources, Benefits and Wellness, Workforce Development, and Marketing and Communications.



**Sommer Morales***Vice President, Compensation*

Sommer has over 20 years of experience managing employer compensation and benefits plans and HR information systems. A graduate of California Polytechnic State University, Sommer has worked at Tulane University Hospital & Clinic, CompuCom Systems, Hostess Brands, and most recently Mindbody. Sommer formerly managed Lockton's Compensation Practice and supported clients in a broad variety of industries. She rejoined Lockton in July 2018 and provides consultative services while also managing the compensation practice.

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**Erica Dominguez, CCP, GRP***Senior Compensation Consultant*

Erica has more than 25 years of experience with employer compensation plans. A graduate of Southern Methodist University, Erica began her career at CompuCom Systems where she worked on designing and administering compensation plans. Erica most recently worked as a Senior Compensation Analyst for Zale Corporation. Erica joined Lockton in 2013 and provides consultative compensation services with specific expertise in broad-based compensation, incentive plan design, and analysis and executive compensation.

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**Gordon "Trey" Summit, CCP***Senior Compensation Consultant*

After earning his MBA from Texas A&M University, Trey began his 20+ year compensation career as an Analyst with Northrop Grumman; literally sitting in the basement underneath an aircraft factory. Since then, he has risen through the ranks in a number of industries and in a variety of compensation functions, including broad-based and incentive pay design and administration, sales, and executive pay. His last corporate role was as a Senior Director of Compensation with Conifer Health Solutions. Since then, he has consulted with many companies to help them solve their interesting compensation problems. Trey joined Lockton Dunning Benefits in 2021, where he can focus his deep understanding of broad-based and incentive compensation on meeting client's needs.

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**Pete Krogulski, CCP, PHR, GRP***Senior Compensation Consultant*

Pete has nearly 15 years of experience in global compensation, human resource management, project management, and M&A integration with publicly traded companies within the commercial real estate, financial services, and retail industries. Most recently, Pete worked as a Senior Compensation Analyst for JLL, Inc. Pete joined Lockton Dunning Benefits in May 2021 and provides consultative



compensation services with specific expertise in global compensation and executive compensation for publicly traded companies.

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**Andreea Tate, CCP, GRP, LSSGB, HCPM, MSIM**

*Senior Compensation Consultant*

Andreea has 15+ years of experience in in-house compensation, global compensation, project management, lean process improvement, and M&A integration with companies from not-for-profit, to publicly traded, within industries such IT, insurance, healthcare, manufacturing, and science. Her desire for process improvement and technology drove her to obtain her Master's in information management from Arizona State University. Andreea most recently came from Ceridian where she helped with M&A for their Asian and Latin American countries. Andreea joined Lockton Dunning Benefits in March 2022 and provides consultative compensation services with specific expertise in broad-based and incentive compensation on meeting clients' needs.

Please see Appendix A for full biographies.





## References

### *City of Slidell, LA — Municipality*

Contact name and title	Marianne White, Civil Service Director
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Phone	985.646.4378
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Email	m.white@cityofslidell.org
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### *Children's Health — Nonprofit Organization (greater than 3,000 employees)*

Contact name and title	Vicky Ferguson, Senior Compensation Consultant
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Phone	214.456.1391
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Email	vicky.ferguson@childrens.com
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### *AZZ, Inc. — Private Employer (Greater than 3,000 employees)*

Contact name and title	Jennifer Asaro, Compensation Analyst
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Phone	708.426.5439
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Email	jenniferasaro@azz.com
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# Pricing

Our typical project includes weekly or biweekly update meetings to keep the Jefferson Parish informed on our progress. We find that most communication can be managed through emails and phone/web conference.

Our standard approach in proposing a fee arrangement is to provide you with an all-inclusive fee. We find it is easier for all to focus on the task at hand rather than be distracted by discussions of whether something is in the anticipated scope of our assignment or not. Our fee for this project is detailed in the chart below. This amount would be billed to Jefferson Parish monthly, in the amount of \$50,857 for seven months, with payment due within 30 days.

<i>Phase</i>	<i>Timing</i>	<i>Fee</i>
<b>Background and Strategy Review</b>	2 weeks	Included
<b>Existing Materials Review</b>	2 weeks	Included
<b>External Market Compensation Study</b>	10 weeks	\$30,000
<b>Data Analysis and Recommendations</b>	12-16 weeks	
▪ Classified		\$162,500
▪ Executive		\$117,500
▪ Judicial		\$27,500
▪ Fire Department		\$12,500
▪ Pay Guidelines		\$6,000
<b>Report and Presentations</b>	4 weeks	Included
		<b>Total \$356,000</b>

The cost of third-party salary surveys varies, should you choose to purchase additional resources in lieu of a custom survey. Our team can help facilitate the purchase of surveys, but Jefferson Parish will own the data for current and future use.





*Appendix A:*

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*Biographies*





## Chris Williams

Vice President

[chris.williams@lockton.com](mailto:chris.williams@lockton.com)

Lockton Dunning Benefits

Joined Lockton in 2019

### EXPERTISE

Chris currently serves as Vice President for Health and Welfare. Chris has nearly a decade of experience intimately overseeing the management of a large self-insured health plan. His background in hospitality, government, construction and corporate administration uniquely positions him to serve as a strategic adviser in the healthcare and wellness industry for a broad range of businesses.

Prior to joining Lockton Dunning Benefits, Chris was a part of Barriere Construction Co. LLC, where he last served as Director of Administration and Employee Development. In the role, he oversaw many administrative functions, including Human Resources, Benefits and Wellness, Workforce Development and Marketing and Communications. Chris served on the company's Senior Executive Committee and Executive Committee and played an integral role as a strategic decision maker for the business. Utilizing the skills gained from his unique background, he aims to help companies control the cost of healthcare while bringing new ideas to help improve the impact of the health plan, increase employee engagement and enhance bottom-line results. His areas of expertise include:

- Executing company strategy, mission, vision and values
- Implementing and maintaining health and wellness programs
- Strategic planning and business process improvements
- Culture building
- Design and administration of workforce development initiatives
- Development and implementation of communication initiatives
- Multi-generational family business management

### EDUCATION

Tulane University

Master of Business Administration in Strategic Management

University of Georgia

Bachelor of Business Administration in Finance

### PROFESSIONAL AFFILIATIONS

Morton J. Aldrich Society – A.B. Freeman School of Business, Member

Tulane Association of Business Alumni, Board Member / Chairman, Tulane Business Forum

Tulane Freeman 50, Board Member / Former President

Louisiana Green Corps, Board Member / Secretary

Fore!Kids Foundation, Board Member





## Sommer Morales

Vice President

[smorales@lockton.com](mailto:smorales@lockton.com)

Lockton Dunning Benefits

Joined Lockton in 2018

### EXPERTISE

Sommer Morales has more than 18 years of experience managing employer compensation plans. A graduate of California Polytechnic State University, Sommer began her career in New Orleans at Tulane University Hospital & Clinic, where she worked on the design and administration of compensation and benefit plans. Sommer then moved to CompuCom, Hostess Brands and most recently MINDBODY. Sommer managed Lockton's Compensation Practice from 2012-2014 and from 2018 to the present. She supports clients in a broad variety of industries and provides consultative services while also managing the compensation practice.

Sommer has extensive expertise in managing and designing competitive broad-based total rewards programs that attract and retain top talent. She assists clients with strategy, design, funding, administration, and communication of compensation programs, incentive compensation plans, including annual and sales programs, executive compensation, and pay-for-performance systems.

Sommer has performed presentations across the country for Human Resources associations on topics such as Identifying and Addressing Pay Gaps as a Strategy to Win and Retain Talent and The Risks of Crowdsourced Compensation Data.

### EDUCATION

California Polytechnic State University  
BS, Business Administration  
Minor in Economics

### PROFESSIONAL AFFILIATIONS

WorldatWork

### CIVIC INVOLVEMENT

Woods Humane Society Volunteer and Foster Home  
Creeks to Coast Volunteer





*Appendix B:*

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*Sample Reports*



SAMPLE-Market Survey Submission Form

Incumbent Data											
Facility Code	Employee ID Code	Survey Job Code	Survey Job Title	Crg Job Code	Org Job Title	Hourly Base Pay	Range Min (Hourly)	Range Mid (Hourly)	Range Max (Hourly)	FLSA Exemption	Union Position?
1	219239	2066	Accounting Clerk	025	Accounts Payable Associate	\$14.89	\$14.89	\$16.77	\$18.64	Non-Exempt	No
1	219240	2043	Administrative Assistant to Department	Head	Occupational Medicine Departmental Secretary	\$14.10	\$13.74	\$16.85	\$19.96	Non-Exempt	No
1	219241	2043	Administrative Assistant to Department	Head	Audiology Assistant	\$15.92	\$13.74	\$16.85	\$19.96	Non-Exempt	No
1	219242	2043	Administrative Assistant to Department	Head	Coding Departmental Secretary	\$16.82	\$13.74	\$16.85	\$19.96	Non-Exempt	No
1	219243	2043	Administrative Assistant to Department	Head	Quality/Patient Safety Departmental Secretary	\$17.57	\$13.74	\$16.85	\$19.96	Non-Exempt	No
1	219244	2043	Administrative Assistant to Department	Head	Occupational Medicine Departmental Secretary	\$17.78	\$13.74	\$16.85	\$19.96	Non-Exempt	No
1	219245	2040	Administrative Assistant to Department Supervisor/Manager	1r18	Imaging Scheduler	\$13.22	\$12.24	\$15.35	\$18.46	Non-Exempt	No
1	219246	2040	Administrative Assistant to Department Supervisor/Manager	1r18	Imaging Scheduler	\$14.49	\$12.24	\$15.35	\$18.46	Non-Exempt	No
1	219247	2040	Administrative Assistant to Department Supervisor/Manager	0r11	Administrative Secretary	\$16.54	\$15.39	\$20.04	\$24.68	Non-Exempt	No
1	219248	2040	Administrative Assistant to Department Supervisor/Manager	0r11	Administrative Secretary	\$17.94	\$15.39	\$20.04	\$24.68	Non-Exempt	No
1	219249	2040	Administrative Assistant to Department Supervisor/Manager	0r11	Administrative Secretary	\$20.07	\$15.39	\$20.04	\$24.68	Non-Exempt	No
1	219250	7423	Athletic Trainer - Certified	214	Certified Athletic Trainer	\$22.03	\$18.90	\$23.61	\$28.32	Non-Exempt	No
1	219251	7423	Athletic Trainer - Certified	214	Certified Athletic Trainer	\$25.35	\$18.90	\$23.61	\$28.32	Non-Exempt	No
1	219255	7038	Benefits Analyst/Coordinator	027	Benefit Coordinator	\$21.27	\$16.46	\$19.58	\$22.70	Non-Exempt	No
1	219256	7080	Billing/Accounts Receivables Clerk	071	Cashier	\$14.73	\$14.42	\$18.19	\$21.96	Non-Exempt	No
1	219257	7080	Billing/Accounts Receivables Clerk	071	Cashier	\$16.46	\$14.42	\$18.19	\$21.96	Non-Exempt	No
1	219258	7080	Billing/Accounts Receivables Clerk	071	Cashier	\$17.04	\$14.42	\$18.19	\$21.96	Non-Exempt	No
1	219259	7080	Billing/Accounts Receivables Clerk	071	Cashier	\$17.83	\$14.42	\$18.19	\$21.96	Non-Exempt	No



SAMPLE Market Survey Report

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Allied Health & Professional Staff Positions					Pay data reported in HOURLY pay rates									
Job Family	Survey Job Code	Survey Job Title	# of Base Orgs	# of Base Incumbents	10th Percentile Base	25th Percentile Base	Average Firm Base Pay	Average (Wtd) Base Pay	Median Base	75th Percentile Base	90th Percentile Base	Average Pay Range Minimum	Average Pay Range Midpoint	Average Pay Range Maximum
Actg, Finance & Business Office	7076	Accountant	60	161	\$21.22	\$22.90	\$25.42	\$25.55	\$25.46	\$27.97	\$30.01	\$21.56	\$26.99	\$31.67
	7681	Accountant, Senior	45	108	\$23.41	\$29.01	\$32.70	\$32.02	\$32.94	\$35.03	\$38.67	\$26.33	\$33.29	\$40.61
	2066	Accounting Clerk	60	151	\$14.52	\$16.10	\$15.15	\$18.39	\$18.46	\$20.81	\$22.00	\$14.72	\$18.66	\$21.63
	6016	Activities Assistant	37	128	\$11.12	\$12.43	\$15.25	\$14.31	\$14.26	\$16.01	\$17.47	\$11.70	\$14.56	\$18.38
	416	Activities Coordinator	24	63	\$15.50	\$16.93	\$20.35	\$19.56	\$18.58	\$22.81	\$24.21	\$18.15	\$21.97	\$25.84
	2044	Administrative Assistant to CEO / President	71	83	\$17.89	\$19.47	\$25.84	\$25.48	\$23.72	\$30.77	\$36.05	\$21.56	\$26.47	\$31.46
	2043	Administrative Assistant to Department Head	100	954	\$14.48	\$16.24	\$20.46	\$19.03	\$18.59	\$21.28	\$24.17	\$14.57	\$19.88	\$24.81
	2040	Administrative Assistant to Department Supervisor/Manager	90	1,304	\$18.14	\$19.41	\$24.03	\$21.41	\$21.58	\$23.86	\$24.29	\$16.94	\$20.54	\$24.21
	2041	Administrative Assistant to VP / Functional Head	61	357	\$18.12	\$20.24	\$24.03	\$23.92	\$22.87	\$27.01	\$31.94	\$18.90	\$24.78	\$30.19
	7674	Administrative Support - Emergency Department	2	9										
Clinical Nursing	7683	Advance Care Planning Coordinator	5	6			\$44.54	\$43.64	\$43.95			\$31.14	\$40.39	\$49.98
	3051	Advanced Dental Therapist	3	5										
	2100	Aesthetian	12	23	\$16.70	\$17.03	\$20.72	\$20.04	\$20.16	\$22.38	\$24.00	\$15.79	\$19.29	\$23.11
	7374	Applications Specialist - Nursing	8	16	\$33.51	\$36.59	\$39.30	\$42.61	\$46.44	\$46.44		\$32.87	\$41.02	\$49.22
	7383	Applications Specialist - Pharmacy	10	46	\$20.68	\$35.06	\$57.06	\$54.98	\$65.89	\$72.15	\$75.86	\$41.13	\$51.77	\$62.49
	7380	Applications Specialist - Radiology	5	10			\$31.93	\$33.85	\$33.10			\$29.12	\$36.40	\$44.47
	7423	Athletic Trainer - Certified	71	663	\$18.63	\$20.72	\$22.67	\$23.11	\$22.85	\$25.10	\$28.00	\$19.36	\$24.97	\$30.06
	4110	Audiologist	41	177	\$32.50	\$35.25	\$38.86	\$38.53	\$37.84	\$41.65	\$45.87	\$29.59	\$37.81	\$74.01
	7504	Auditor, Clinical	9	26	\$25.59	\$29.53	\$29.53	\$29.53	\$29.61	\$33.00	\$34.61	\$23.33	\$29.51	\$34.82
	7501	Auditor, Financial, Operational, and Compliance	9	16	\$29.28		\$34.03	\$34.81	\$35.83	\$40.12		\$28.73	\$35.75	\$42.98
Actg, Finance & Business Office	7463	Benefits Analyst, Senior	14	29	\$34.47	\$36.78	\$41.40	\$41.62	\$41.00	\$45.77	\$48.64	\$33.08	\$41.10	\$49.50
	7038	Benefits Analyst/Coordinator	29	42	\$21.95	\$24.96	\$28.37	\$28.75	\$28.62	\$31.04	\$37.35	\$23.09	\$29.00	\$34.26
	1054	Billing Specialist - Dental	2	32										
	7528	Bone Density Technician	2	4										
	7210	Bookkeeper - Clinic	15	27	\$16.04	\$18.54	\$23.70	\$22.11	\$22.05	\$24.79	\$29.08	\$16.49	\$20.13	\$23.90
	7575	Cardiac Rehabilitation Therapist	23	79	\$22.91	\$27.26	\$29.48	\$30.28	\$30.83	\$33.98	\$36.74	\$24.69	\$30.52	\$36.35
	1011	Cardiac Ultrasound Technician (Echocardiology Technologist)	33	368	\$28.11	\$31.87	\$36.23	\$35.62	\$36.02	\$39.52	\$43.48	\$28.87	\$37.21	\$44.02
	2102	Cardiovascular Technologist (Invasive)	24	182	\$23.34	\$25.14	\$29.77	\$28.92	\$28.64	\$31.98	\$34.82	\$23.88	\$30.32	\$35.67
		Care Navigator (Alternative titles: Care Manager, Case Manag	51	578	\$30.86	\$34.84	\$37.87	\$39.18	\$38.92	\$44.80	\$46.20	\$30.71	\$37.71	\$45.54
		Care Navigator, Breast (or Specialty Service) Health Center Co	14	39	\$26.69	\$31.36	\$36.99	\$35.68	\$35.20	\$38.26	\$50.62	\$26.50	\$33.06	\$39.86
Actg, Finance & Business Office	5014	Carpenter	24	80	\$20.62	\$22.66	\$28.80	\$27.14	\$25.28	\$32.86	\$36.32	\$21.38	\$27.95	\$31.04
	1067	Case Manager, Employee Health & Rehabilitation	5	5			\$38.70	\$38.70	\$38.87	\$40.25	\$25.31	\$20.25	\$25.31	\$27.84
	7080	Cashier (Business Office)	28	248	\$14.04	\$14.20	\$17.50	\$16.48	\$15.64	\$18.41	\$20.40	\$14.26	\$16.84	\$19.56
	7193	Cashier (Cafeteria)	7	63	\$13.90	\$14.81	\$15.19	\$15.19	\$15.33	\$16.48	\$17.61	\$12.73	\$15.15	\$17.61
	6003	Central Supply Aide	16	141	\$12.14	\$13.99	\$16.66	\$14.74	\$13.36	\$16.98	\$18.38	\$12.82	\$16.60	\$18.53
	4044	Central Supply/Sterilization Technician	59	662	\$13.90	\$15.18	\$17.43	\$17.82	\$17.62	\$20.32	\$22.04	\$15.14	\$18.12	\$21.07
	4053	Certified Biomedical Electronics Technician	21	101	\$27.23	\$33.00	\$33.79	\$33.79	\$35.35	\$37.22	\$39.07	\$26.37	\$31.55	\$36.85
	7578	Certified Hand Therapist (GHT)	14	62	\$33.00	\$38.05	\$38.60	\$38.68	\$40.82	\$42.85	\$44.33	\$31.89	\$38.30	\$46.41
	4013	Certified Occupational Therapy Assistant (COTA)	85	226	\$18.59	\$20.91	\$23.01	\$23.01	\$23.30	\$25.90	\$28.61	\$18.04	\$22.12	\$27.12
	7510	Certified Orthotist	11	44	\$29.92	\$33.59	\$41.55	\$38.79	\$39.36	\$43.78	\$48.00	\$30.98	\$40.14	\$45.33
Actg, Finance & Business Office	7160	Charge Nurse	35	1,004	\$30.09	\$32.84	\$40.50	\$40.32	\$39.80	\$47.30	\$53.08	\$30.77	\$39.58	\$46.76
	3043	Chemical Dependency Counselor	24	197	\$20.33	\$21.79	\$24.01	\$24.46	\$24.00	\$27.11	\$28.58	\$21.02	\$25.84	\$30.64
	2104	Childbirth Educator	11	27	\$27.16	\$29.93	\$33.71	\$33.71	\$33.52	\$37.19	\$40.59	\$26.27	\$33.15	\$39.29
	7334	Chiropractor	11	40	\$38.86	\$42.10	\$46.68	\$45.56	\$45.68	\$49.08	\$49.46	\$37.75	\$44.95	\$52.76
	2001	Clerk (Entry Level)	25	264	\$11.39	\$13.37	\$15.02	\$15.31	\$15.12	\$16.39	\$22.08	\$13.02	\$16.19	\$18.73
	1053	Clinic Care Coordinator	4	22										
	2105	Clinical Data Analyst	39	154	\$26.13	\$28.85	\$32.76	\$35.30	\$35.30	\$40.47	\$46.60	\$28.26	\$36.62	\$43.77
	7507	Clinical Informatics Analyst (Associate's Degree)	13	29	\$22.80	\$25.04	\$30.67	\$29.04	\$29.04	\$34.33	\$40.60	\$28.04	\$31.72	\$37.50
	7152	Clinical Nurse Specialist	39	293	\$41.61	\$46.73	\$52.26	\$52.06	\$52.98	\$57.11	\$61.59	\$39.71	\$50.32	\$59.80
	7635	Clinical Operations Coordinator	6	9		\$39.22	\$40.59	\$42.98	\$45.07	\$47.86		\$34.32	\$42.49	\$51.07



SAMPLE Market Survey Report

Pharmacy	420	Clinical Pharmacy Coordinator	16	31	\$59.89	\$61.94	\$67.23	\$66.25	\$66.28	\$70.24	\$73.46	\$52.01	\$63.45	\$74.96
Quality / Process Improvement	1071	Clinical Quality Data Coordinator	7	13	\$29.94	\$29.94	\$37.81	\$35.91	\$36.83	\$41.76	\$47.26	\$27.26	\$34.10	\$37.53
Specialized Care	7680	Clinical Research Coordinator	23	71	\$21.45	\$24.32	\$27.84	\$27.25	\$27.40	\$30.00	\$32.71	\$22.85	\$28.73	\$34.61
Clinical Nursing	7465	Clinical Research II	20	50	\$27.00	\$32.86	\$36.73	\$37.24	\$36.39	\$41.60	\$48.18	\$29.30	\$36.27	\$43.52
Medical Records / Health Info	4010	Coder (ART/AHIT)	80	1,013	\$19.16	\$20.52	\$22.66	\$23.34	\$23.02	\$25.78	\$28.24	\$20.11	\$23.56	\$28.08
Medical Records / Health Info	2068	Coder (non-ART/RRR)	57	623	\$17.47	\$19.48	\$20.31	\$21.53	\$21.56	\$23.46	\$25.40	\$18.46	\$22.66	\$27.04
Medical Records / Health Info	7353	Coding (Lead)	30	77	\$24.18	\$25.97	\$27.92	\$28.26	\$28.83	\$31.10	\$31.83	\$21.85	\$26.56	\$31.27
Actg, Finance & Business Office	3240	Collections Specialist	56	295	\$15.24	\$16.61	\$19.32	\$19.05	\$18.32	\$21.33	\$23.47	\$15.77	\$18.97	\$22.28
Specialized Care	7129	Community Health Programs Coordinator	15	31	\$24.46	\$26.51	\$29.02	\$30.04	\$29.49	\$33.83	\$36.60	\$25.19	\$31.62	\$37.98
Specialized Care	3075	Community Health Worker	2	40										
Clinical Nursing	7127	Community Paramedic	4	33										
Human Resources	7035	Compensation Analyst	10	23	\$24.61	\$29.43	\$30.79	\$31.58	\$31.06	\$34.12	\$37.40	\$25.91	\$33.19	\$39.05
Human Resources	7450	Compensation Analyst, Senior	14	27	\$38.46	\$39.36	\$41.49	\$42.70	\$42.12	\$47.46	\$51.01	\$34.01	\$42.51	\$51.08
Quality / Process Improvement	3260	Compliance Specialist	23	68	\$25.94	\$28.96	\$35.12	\$33.64	\$31.60	\$38.45	\$44.47	\$26.63	\$33.93	\$40.03
Information Systems	4028	Computer Operator	2	2										
Information Systems	7667	Computer Operator - Data Center	1	19										
Quality / Process Improvement	7462	Continuous Improvement Specialist, Lead	14	48	\$28.13	\$32.65	\$41.41	\$40.80	\$38.49	\$49.68	\$52.10	\$31.40	\$40.42	\$46.06
Actg, Finance & Business Office	7524	Contract Analyst	15	26	\$25.71	\$28.16	\$37.38	\$35.98	\$35.48	\$41.24	\$44.36	\$28.34	\$35.62	\$43.18
Food Service	6001	Cook	88	1,020	\$12.34	\$13.80	\$16.16	\$15.99	\$15.80	\$17.64	\$20.23	\$13.32	\$16.62	\$19.53
Food Service	7670	Cook - Long Term Care / Assisted Living	14	60	\$12.85	\$14.20	\$15.18	\$15.80	\$16.11	\$17.49	\$18.28	\$12.99	\$15.56	\$18.17
Marketing & Public Relations	1056	Coordinator, Volunteer Program(s)	24	32	\$18.00	\$19.57	\$22.19	\$22.09	\$21.86	\$24.52	\$26.42	\$18.97	\$22.96	\$27.16
Marketing & Public Relations	7652	Copywriter	4	8										
Actg, Finance & Business Office	7473	Cost Report Accountant	2	3										
Materials Management	7092	Courier/Driver	46	426	\$11.67	\$12.58	\$15.02	\$14.65	\$14.52	\$16.19	\$18.38	\$11.98	\$15.04	\$17.36
General Mgmt & Admin Support	7207	Credentialing Coordinator	23	37	\$19.36	\$24.09	\$26.32	\$26.74	\$27.06	\$29.98	\$31.69	\$21.45	\$26.39	\$31.68
General Mgmt & Admin Support	7206	Credentialing Specialist	49	168	\$17.07	\$19.24	\$21.48	\$21.94	\$22.00	\$24.66	\$27.00	\$18.33	\$22.24	\$28.37
Radiology	7120	CT Scan Technologist	58	725	\$23.95	\$26.62	\$31.09	\$30.68	\$30.48	\$34.81	\$37.90	\$24.60	\$31.71	\$38.46
Laboratory	3132	Q/technologist	27	125	\$27.67	\$29.63	\$33.48	\$33.19	\$33.46	\$36.92	\$39.28	\$26.80	\$33.56	\$39.95



SAMPLE Salary Structure

Job Title	Pay Class	Market Median	Grade
Accounting Clerk- Accounts Payable	Hourly	\$50,225	NU-02
Accounting Clerk- Capital Credits-MISC Billing	Hourly	\$55,429	NU-04
Accounting Clerk- Cashier	Hourly	\$50,032	NU-02
Accounting Clerk- Inventory	Hourly	\$51,922	NU-03
Accounting Supervisor	Salaried	\$102,681	NU-10
Administrative Support Specialist- Energy Services	Hourly	\$55,789	NU-04
Administrative Support Specialist & Reception	Hourly	\$46,822	NU-02
Administrative Support Specialist -Operations	Hourly	\$55,789	NU-04
Billing Specialist	Hourly	\$58,756	NU-04
Cable Locator- Groundman	Hourly	\$90,757	U-03
Corporate Accountant	Salaried	\$103,122	NU-10

Non-Union Structure			
Grade	Minimum	Midpoint	Maximum
NU-01	\$34,800	\$43,500	\$52,200
NU-02	\$38,300	\$47,900	\$57,500
NU-03	\$42,200	\$52,700	\$63,300
NU-04	\$46,400	\$58,000	\$69,600
NU-05	\$51,000	\$63,800	\$76,500
NU-06	\$56,200	\$70,200	\$84,300
NU-07	\$61,800	\$77,200	\$92,700
NU-08	\$67,900	\$84,900	\$101,900
NU-09	\$74,700	\$93,400	\$112,100
NU-10	\$82,200	\$102,700	\$123,300
NU-11	\$90,400	\$113,000	\$135,600
NU-12	\$99,400	\$124,300	\$149,100
NU-13	\$109,400	\$136,700	\$164,100
NU-14	\$120,900	\$157,200	\$193,400
NU-15	\$139,100	\$180,800	\$222,600

Union Structure			
Grade	Minimum	Midpoint	Maximum
U-01	\$58,600	\$73,200	\$87,900
U-02	\$64,400	\$80,500	\$96,600
U-03	\$70,900	\$88,600	\$106,400
U-04	\$78,000	\$97,500	\$117,000
U-05	\$85,800	\$107,300	\$128,700



## SAMPLE Job Description

### POSITION DESCRIPTION

**Class Title:** Customer Service Manager

**Effective Date:**

**Department:** Finance

**Pay Grade:**

**FLSA Status:**

### GENERAL PURPOSE

This is a professional and administrative position that manages and evaluates subordinates in office operations, field service operations and meter reading operations. This position handles complaints and problems related to water and sewer customer service, miscellaneous receivables and cash receipts. Duties are performed with moderate independence requiring the exercise of judgment and initiative in day-to-day operations.

### SUPERVISION RECEIVED

Position works under the general guidance and direction of the Asst. Director of Finance.

### SUPERVISION EXERCISED

Directs, oversees and participates in the development of the divisions work plan which coordinates and assigns work activities, projects and programs; monitors work flow for water and sewer office operations, field service operations, and meter reading operations. This position is responsible for hiring, training and oversight of all positions in utility billing services.

### ESSENTIAL DUTIES AND RESPONSIBILITIES

1. Coordinates all office and field activity, including cashiering, preparation of utility billing, meter reading, miscellaneous receivables and cash receipts, and incoming customer calls.
2. Monitors the preparation and administration of operating and capital budgets for the division of Water and Sewer Customer Services.
3. Assigns daily work schedules.
4. Assists in resolving difficult situations concerning high water usage, delinquent bills, collection procedures for returned checks, non-payment of accounts, etc.
5. Assists in the coordination and oversight of the personnel functions of the Department to ensure compliance with City policies and procedures; assists in the interviewing and hiring of personnel.
6. Coordinates with bank officials on customers' automatic drafts and lock box system accounts.
7. Oversees meter routing, assignment of account numbers, and meter read sequences.
8. Communicates and negotiates courteously and effectively with other city employees, city officials, banking officials, vendors, and citizens.
9. Authorizes installation of flow search device when appropriate.
10. Investigates questionable meter readings.



## SAMPLE Job Description

The employee must occasionally lift and/or move up to thirty (30) pounds. Specific vision abilities required by this job include close vision, distance vision, color vision, peripheral vision, depth perception, and the ability to adjust focus.

### **WORK ENVIRONMENT**

The work environment characteristics described here are representative of those an employee may encounter while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this job the employee usually works in a climate controlled office environment.

The noise level in the work environment is usually quiet to moderate.

### **SELECTION GUIDELINES**

Formal application, rating of education and experience; oral interview and reference check; job related tests may be required.

**The duties listed above are intended only as illustrations of the various types of work that may be performed. The omission of specific statements of duties does not exclude them from the position if the work is similar, related or a logical assignment to the position.**

**The job description does not constitute an employment agreement between the employer and employee and is subject to change by the employer as the needs of the employer and requirements of the job change.**

Approval: \_\_\_\_\_  
Civil Service Personnel Director

Approval: \_\_\_\_\_  
Department Director



## Notes

[illegible]





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UNCOMMONLY INDEPENDENT