

Accomplishments

1. On 11/3 – Crowe delivered the revised and final Market Pricing Results Summary which incorporated City feedback.
2. On 11/14 – The City and Crowe conducted the final project closeout meeting.
3. On 11/14 – Crowe provided a zip file to the City with all final project deliverables.

Next Steps & Discussion Items

1. January 2024 – The City and Crowe to discuss next steps for possible implementation support.

Note: This serves as the final Crowe project status report for initially scoped work. See the Project Plan and Summary Timeline section below for all activity completion dates.

Decision Log

ID	Log Date	Description	Impact	Status
1	2/28/23	Decision made to adjust the schedule for the PDQ process and remove HR's review/validation of PDQ accuracy prior to submitting to Crowe. HR decided that supervisor/department head review will satisfy the verification of accurate PDQ contents. Crowe will also raise substantial discrepancies between job descriptions and PDQs to HR as part of Crowe review. See Closed Risk #1.	No impact expected. Per revised schedule Crowe is on track to receive PDQs by originally scheduled date of 3/24.	Approved
2	3/28/23	Decision made to consider Activity 3.4 Develop Job Narratives as complete. See Project Plan 3.4 below. HR and Crowe agreed this activity was completed by (1) job family descriptions in the draft Strategy document, (2) an Excel file that will assign each job to a family, and (3) list of peer competitors for each family.	No impact. Crowe updated activity status to complete.	Approved
3	4/18/23	HR signed off on using 6 peers for all job families (Published Survey; Monroe County, IN; Indianapolis, IN; Indiana University; Columbus, IN; State of Indiana) and 2 additional peers (Ann Arbor, MI; Champaign, IL) for job families particularly challenged by recruitment and/or retention (Engineering; Exec. Leadership; ITS). HR also approved selection of (1) benchmark positions, (2) job families for market pricing.	HR signoff was required prior to commencing market pricing.	Approved
4	5/8/23	Decision made to close window for submission of PDQs on Friday, 5/12. HR and Crowe agreed that the City is not likely to receive additional PDQs following 5/12. For market pricing activities Crowe will rely on JDs only for those positions without a submitted PDQs.	No impact. Crowe updated activity status to complete.	Approved
5	5/11/23	Decision made to extend project schedule end date for Activity 2.7 Finalize Strategy with City. The City is meeting in June to review Crowe feedback and discuss possible revisions to point factors; this feedback will be incorporated into the Strategy deliverable. HR and Crowe agreed to extend the target end date for Activity 2.7. Crowe has proposed a target end date of 6/30 pending City approval.	No impact. Crowe updated proposed project schedule date below.	Approved
6	6/20/23	Decision made to pause market pricing activities. The City and Crowe are discussing a tentative addition to current project scope: <i>Validate Pay Grade of Select In-Scope Positions for Purposes of Market Analysis</i> . Current market pricing activities are paused pending the City decision on the inclusion of this activity. See Issue ID #5 below. 7/19 update: the City and Crowe executed a change order for an additional activity to evaluate jobs using the City's scoring matrix.	There will be schedule impacts that will result in a delay starting and/or completing activities 3.11-3.13.	Approved

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ID	Log Date	Description	Impact	Status
7	7/24/23	The City will wait for the results of the first batch of 20 jobs scored by the consulting team prior to sending additional assigned titles to rescore.	There will be schedule impacts that will result in a delay starting and/or completing activities 3.11-3.13.	Approved
8	9/12/23	Decision made to pause final report deliverable for one week pending COB sign-off on pay ranges. The City and Crowe will discuss next steps and go-forward options at 9/19 status meeting.	There may be schedule impacts that result in a delay completing activities 3.7, 3.14, and 4.1.	Approved
9	9/19/23	Decision made for Crowe to move forward with completing final report deliverable, including the pay ranges provided to the City on 9/9 for review. Crowe intends to include two iterations of recommended pay ranges in the final report deliverable: (1) final version of recommended pay ranges provided to COB for review on 9/9 (as part of feedback on draft memo for the Mayor) and (2) initial recommended pay ranges provided to COB for review on 8/22 (prior to COB policy driven adjustments).	No impact. Crowe is on track to deliver final report by 9/29.	Approved

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Risk & Issue Log

ID	Log Date	Level	Identified By	Owner	Description	Mitigation Strategy	Status
1	2/27/23	Moderate	Peden	Peden	PDQ template needs to be finalized prior to distribution, and this schedule is at risk. There may be a need to adjust the project schedule for the PDQ process.	Updated 3/6 — PDQs have been sent to in-scope employees on 3/2. Emily and Crowe revised the PDQ schedule (see Next Steps dates 2a and 2b above). The revised schedule keeps with the original submit to Crowe date 3/24. Emily and Crowe will continue to monitor to PDQ timeline.	Closed
2	4/10/23	Moderate	Peden	Peden	Crowe has not received completed PDQs for all in-scope positions. The scheduled end date for this activity was 3/24. Activities 3.3, 3.5, 3.6, and 3.7 are behind schedule.	As of 5/12, HR and Crowe have closed the window for submission of PDQs and will move forward with market pricing activities.	Closed
3	4/18/23	Low	Peden	Peden	Activity 2.7: Finalize Strategy with City is behind schedule. The City and Crowe are discussing possible edits to point factor evaluation criteria, which will be incorporated into the final Strategy document.	The City is meeting in June to review Crowe feedback and discuss possible revisions to point factors. Emily and Crowe adjusted the project schedule date for this activity — see Decision Log #5.	Closed
4	5/11/23	Moderate	Peden	Peden	Activity 3.10 Conduct Public Peer Research and Gather Private Peer Data is behind schedule. As of 5/15 Crowe is working to obtain an updated position list and finalize review of the City of Indianapolis data source.	Crowe has connected with the City of Indianapolis to obtain an updated City position list. Crowe expects to receive the position list by 5/19.	Closed
5	6/20/23	High	Peden	Peden	Current market pricing activities are paused at the City's direction (see Decision Log ID #6 above). There will be schedule impacts that will result in a delay starting and/or completing activities 3.11-3.13.	Crowe will resume market pricing activities following the completion of the additional job description evaluation and re-grading activities.	Closed

Log Key:

Level – the potential impact on the project (e.g., timeline, budget and/or deliverables)

Low	Minimal impact, affecting at least one project aspect.
Moderate	Medium impact, affecting more than one project aspect.
High	Significant impact affecting more than one project aspect. Needs immediate attention.

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Project Plan & Summary Timeline
 Working Draft

ID	Key Activities	Target Start Date	Target End Date	Actual Start Date	Actual End Date	Status	Notes
Phase 1: Initiate							
1.1	Conduct initial engagement planning and identify stakeholders	01/23/23	01/30/23	01/23/23	01/30/23	Completed	
1.2	Conduct kickoff meeting with key stakeholders	02/15/23	02/15/23	02/15/23	02/15/23	Completed	
1.3	City to provide requested documentation	01/20/23	01/27/23	02/06/23	02/06/23	Completed	
Phase 2: Develop Strategy							
2.1	Coordinate and facilitate current state interviews	02/13/23	03/13/23	02/15/23	02/17/23	Completed	
2.2	Develop strategy framework	02/20/23	03/13/23	02/15/23	03/13/23	Completed	
2.3	Coordinate and facilitate strategy workshops (up to 6)	02/27/23	03/13/23	03/02/23	03/09/23	Completed	
2.4	Conduct market research on benefits	02/01/23	03/13/23	02/23/23	03/14/23	Completed	
2.5	Develop classification and compensation strategy (draft)	03/13/23	03/24/23	03/2/23	03/27/23	Completed	
2.6	Share classification and compensation strategy with City for review	03/27/23	04/07/23	03/27/23	04/15/23	Completed	
2.7	Finalize strategy with City	04/10/23	6/30/23	04/17/23	06/30/23	Completed	
Phase 3: Conduct Market Analysis for Select Positions							
PDQ, Interviews, and Analysis							
3.1	Develop PDQ; review and obtain City approval	02/13/23	02/24/23	02/13/23	03/02/23	Completed	
3.2	City incumbents to complete PDQs	02/27/23	03/10/23	03/02/23	03/24/23	Completed	
3.3	Supervisors and HR review PDQs	03/13/23	03/24/23	03/13/23	05/12/23	Completed	
3.4	Develop Family Narratives	03/13/23	03/24/23	03/13/23	03/27/23	Completed	
3.5	Analyze PDQs and identify if classification adjustments are recommended	03/27/23	04/07/23	03/27/23	05/12/23	Completed	

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**City of Bloomington
Classification and Compensation Consulting Status Report
November 14, 2023**



ID	Key Activities	Target Start Date	Target End Date	Actual Start Date	Actual End Date	Status	Notes
3.6	Facilitate clarification meetings with City incumbents	04/10/23	04/21/23	04/10/23	05/30/23	Not Started	Information provided in PDQs was sufficient for analysis; clarification meetings were not needed.
3.7	Recommend updates to classifications, titles, and descriptions	04/24/23	05/12/23 09/29/23	04/24/23	09/29/23	Completed	(Classification structure recommendations included with Market Pricing Results Summary report)
3.8	<u>Decision:</u> Determine whether to use recommended updates or current positions for market pricing	05/15/23	05/19/23	5/15/23	05/31/23	Completed	
Market Pricing							
3.9	Identify and obtain City signoff on benchmarks and peer employers	03/27/23	04/03/23	03/27/23	04/15/23	Completed	
3.10	Conduct public peer research and gather private peer data through custom or purchased survey	04/10/23	04/21/23	04/19/23	05/19/23	Completed	
3.11	Conduct market pricing analysis	05/22/23	06/30/23 08/18/23	05/15/23	8/18/23	Completed	
3.12	(New per Change Order): Evaluate jobs using the City's internal valuation scoring matrix	07/19/23	08/11/23	07/19/23	08/08/23	Completed	
3.13	Summarize results and share with City for review	07/10/23	08/04/23 09/15/23	06/26/23	08/21/23	Completed	
3.14	Finalize results	08/07/23	08/18/23 09/29/23	08/18/23	09/29/23	Completed	First draft delivered 9/29 Revised draft delivered 11/3
Phase 4: Project Management and Close Out							
4.1	Conduct project close out meeting	08/21/23	08/25/23 10/06/23	11/14/23	11/14/23	Completed	

Project Plan & Timeline Key:

	Not Started
	Completed
	In Progress and On Track, No Issues or Risks to Report
	In Progress, Issues or Risks to Report
	Delayed or On Hold Due to Issue or Risk, Requires Immediate Attention

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