

PROPOSAL TO PROVIDE PROFESSIONAL SERVICES FOR THE

St. Charles Parish School Board

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A. Submittal Letter

February 15, 2017

Tresa Webre, Assistant Superintendent of Human Resources and Administrative Services
St. Charles Parish School Board
13855 River Road
Luling, Louisiana 70070

RE: Proposal and Accompanying Documents for Conducting a Salary Study

Dear Ms. Webre:

Postlethwaite & Netterville, APAC (“P&N”) is pleased to submit this proposal to St. Charles Parish School Board (“the School Board”) to perform a district-wide classification and compensation study as defined by the Request for Proposal (RFP) dated January 2017. We have enclosed a comprehensive proposal for your review.

Our team of qualified consultants combines extensive experience in human resources (HR) management and governmental operations. Specifically, we understand the needs of the School Board and offer the following in connection with our services:

- Proposed project staff that are available to immediately begin work on the School Board’s project and are committed to meeting the timeframes outlined in the RFP;
- Professional HR consultants with combined experience spanning more than 45 years and with certifications by the Society for Human Resource Management (SHRM);
- An established track record of delivering the types of services requested in the RFP;
- Commitment to ensuring client satisfaction and the highest quality service;
- Significant professional staff and management resources to draw upon, if necessary, outside of the core engagement team;
- Local professionals that are easily accessible and available to help address your most important financial and operational issues at any time during the year; and
- Commitment to high quality, responsive client service and ultimate project success.

It is our understanding that if selected as the successful Proposer, P&N will provide the services described in this proposal with an anticipated completion date of May 12, 2017. Our enclosed proposal is valid through May 12, 2017, the anticipated completion date specified in the RFP.

In addition to our team's experience with similar human resource engagements, P&N offers a history of working with the School Board and numerous other Louisiana school districts and governmental entities to help them meet their goals. We believe our focus on providing exceptional client service delivered by highly knowledgeable resources is evident in our daily interactions. We are excited about the opportunity to work with the School Board, and believe that our team can add value to your project.

Bill Spann will serve as your key contact for matters relating to this proposal or any resulting work:

Bill Spann, Associate Director
bspenn@pncpa.com
(225) 408-4747
Postlethwaite & Netterville, APAC
8550 United Plaza Blvd., Suite 1001
Baton Rouge, LA 70809

In choosing a professional services firm to perform the requested services, the School Board must carefully consider which firm is best positioned to meet its timeframes and requirements. We have an experienced team ready to provide the requested services, backed by the resources of the largest accounting and business consulting firm in Louisiana.

We are extremely excited about this opportunity to serve the School Board. We look forward to answering any questions or providing additional information.

Mark Staley, the undersigned, is a Director (Shareholder) of the firm and is authorized by the firm to negotiate a contract with the School Board.

Sincerely,
POSTLETHWAITE & NETTERVILLE, APAC



Mark Staley
Director

B. Qualifications

FIRM OVERVIEW

P&N was founded in 1949 by Alexander Postlethwaite. Through the years, as our clients have grown, our firm and the professional services we offer have also expanded. We are now the largest Louisiana-based accounting and business consulting firm and one of the top firms in the Gulf Coast region. ***P&N is the only firm in the state to be consistently named one of the top 100 firms in the United States and is currently ranked 65th.***

P&N currently has nine office locations, with ***over 500 total staff***. Our locations include ***Baton Rouge, New Orleans, Lafayette, Covington, Metairie, Donaldsonville, Gonzales, St. Francisville, and Houston***. In Baton Rouge, we were named one of the “Top 100 Private Companies” and the largest accounting firm by the *Baton Rouge Business Report*. The New Orleans area office is ranked as a top 5 accounting firm by *New Orleans CityBusiness*. Our clients include a large cross-section of governmental and not-for-profit entities, businesses and professional practices, and individuals. P&N provides professional services to clients located throughout Louisiana, as well as nationally and internationally.

P&N provides not only traditional assurance and tax services, but numerous specialized services, including compliance and regulatory services, information systems and management consulting, data security studies, business valuations, litigation support, compensation design and planning, and personal financial planning.

EXPERIENCE

At P&N, we understand the complexities of the human resource function and the challenges involved in managing your workforce. Your operations are never one-dimensional, and neither are we. We believe that strategic HR embraces more than just people skills and employment law compliance. Our team takes an enterprise approach when working with your organization.

Representative Project Experience

The P&N project team has extensive experience in leading projects similar in size, scope, and function to this RFP. We believe that our team’s HR consulting experience, combined with our methodology explained in this proposal provides our project team with the insight and knowledge to be able to successfully meet your requirements for this engagement and add value to your operations.

In order for you to understand what our team is offering the School Board, it is imperative that you understand not only how we plan to approach your engagement, but also the depth of our experience providing similar services to other clients. This section illustrates our knowledge and experience providing relevant services to similar clients. This allows our team the ability to leverage best practices learned in prior engagements.

Louisiana Hospital Association (LHA)

HR Assessment, Employee Handbook, Remote Employee Management, HIPAA Security Review, Custom Timesheet Design, Job Description Design

P&N was engaged to perform a Human Resources assessment of Louisiana Hospital Association (LHA). This assessment required P&N to review all documents and files related to human resource functions, as well as provide recommendations to improve their HR department from both a compliance and best practices perspective. P&N also partnered with their HR Director on the development job descriptions for approximately thirty-one (31) positions, inclusive of qualifications, ADA language and training on FLSA exemption testing. P&N also assisted with a revision to the employee handbook and partnered with the HR Director on a handbook presentation to employees of LHA.

In addition to the HR projects listed above, P&N leveraged key experts within the firm to develop a customized timesheet for LHA to manage employee tracking for FLSA compliance as well as meet specific needs to capture data and manage LHA's contract parameters. P&N was also able to leverage our firm's technology and HIPAA experts to perform an analysis of LHA's HIPAA security and provide recommendations to increase the security of protected health information.

Always Best Care (P&H Family Care)

HR Assessment, Employee Handbook, Job Description Design

P&N was engaged to perform a Human Resources assessment of a homecare company in Baton Rouge, LA. This assessment required P&N to review all documents and files related to human resource functions, as well as provide recommendations to improve their HR department from both a compliance and best practices perspective. Throughout this project, P&N developed job descriptions for approximately ten (10) positions, inclusive of qualifications, ADA language and training on Fair Labor Standards Act (FLSA) exemption testing. P&N also created an employee handbook inclusive of onsite handbook presentations to the employees and related forms for the handbook.

McMains Children's Developmental Center

HR Assessment, Employee Handbook and Compensation Plan Design

P&N was engaged to perform a Human Resources assessment of McMains Children's Developmental Center. This assessment required P&N to review all documents and files related to human resource functions, as well as provide recommendations to improve their HR department from both a compliance and best practices perspective. Throughout this project, P&N developed job descriptions for approximately thirteen (13) positions, inclusive of qualifications, ADA language and training on Fair Labor Standards Act (FLSA) exemption testing. P&N also developed an employee handbook (inclusive of a handbook presentation and related HR forms) and a base pay compensation plan to meet the organization's compensation goals to present to the Board of Directors.

KEY PERSONNEL

We strongly believe that the resources offered by the P&N team are unmatched. We feel that this is evident not only in the experience detailed in the previous sections, but also by the experience, knowledge, and training of the type of professionals offered by P&N. The selection of professionals with the necessary experience of our engagement team distinguishes us and our ability to dedicate the resources necessary to address the requirements of the School Board.

P&N offers the School Board professionals with relevant human resources, governmental subject matter experience. Because we are a regional firm, we are able to have a “hands-on” approach to our client relationships. We realize that our senior-level leaders have the greatest experience and should work directly with the School Board in order to be effective and provide opportunities for value-added services. Active participation and involvement by these professionals is what differentiates our firm.

To ensure quality service to our clients, P&N has established criteria for staffing your engagement. These criteria include:

- Experience working in projects of similar scope
- Ability to deliver support to the School Board in every phase of the engagement
- Staff committed to meeting the School Board’s deadlines and engagement objectives

We plan to utilize the following key project staff for this project. Full resumes for these key professionals are included in **Appendix A**.

Team Member	Project Role
Mark Staley	Mark is the Director leading P&N’s Consulting Services Group, and will serve as the Engagement Director for the School Board’s project.
Bill Spann	Bill is an Associate Director in the P&N Consulting Services Group. With over 45 years of experience in the field of human resources, Bill will serve as your Engagement Manager and key contact for work relating to this proposal.
Helene Wall	Helene is an Associate Director in the P&N Consulting Services Group. With over 15 years of human resources experience, Helene will be available to assist with the tasks outlined in this proposal as needed.
Todd Tournillon	Todd is a Director in the P&N Accounting and Assurance Services Group. Todd currently serves as the Director in charge of the School Board’s annual financial statement audit. Because of his knowledge of the School Board and its operations, Todd will serve as a resource for this engagement, as needed.

Depth of Resources

In addition to the strong project team we are proposing, P&N is able to offer you the resources of the largest accounting and consulting firm in the state. With over 500 total staff members, P&N has the ability to expand or modify the engagement team based on your needs.

C. Methodology/Timelines

One of the most important considerations in the selection of your professional services provider is their technical and organizational ability to perform and complete the work in a timely and efficient manner, with minimum interference to the client's day-to-day operations. We believe our experience in leading engagements of similar scope and size will allow us to serve you in a professional and efficient manner.

Our approach to this project recognizes the importance of conducting our work at the highest professional level and at a reasonable cost, which upholds our client service first philosophy. P&N's team of professionals is positioned to fulfill the duties outlined in the RFP.

We believe that our overall knowledge and experience from similar engagements, as well as our local presence as one of the largest professional services firms based in the state of Louisiana, gives us an advantage towards effective performance of the various tasks required under the RFP. It also gives us the ability to predict problems that may arise and to build in sufficient flexibility to address these matters.

METHODOLOGY

Classification Plan

The project scope requires a review of position titles (including supervisory/management) and the presentation of titling structures which define consistent levels of responsibility across the organization.

This phase of compensation plan development is referred to as "job analysis" and results in job descriptions that accurately describe the job title, reporting relationships, job requirements, accountabilities, impediments to performing the job (Americans with Disabilities Act definitions), special skill requirements and, competency requirements.

The methodology employed for this phase of the project includes:

- Review of all project scope activities with the designated project team
- Review of all current job descriptions and job titling plans
 - NOTE: The methodology for this scope component assumes that job descriptions and a titling plan are currently available. If that is not the case, a supplemental step including a job questionnaire will be required to execute job descriptions for the undesignated positions.
- Meeting with select personnel to determine the accuracy of the current job description requirements
- Develop a titling plan that:
 - Makes sense within the St. Charles Parish School Board system structure and,
 - Has been compared to other school system's titling plans
- Edit job descriptions and the recommended titling plan for review by the project team

- Prepare final job descriptions inclusive of a titling plan structure for use in:
 - Making hiring decisions (recruitment)
 - Making compensation systems (compensation plan) and,
 - Potentially, serving as a guide for effective performance management planning
- Prepare a “Guide to Developing Effective Job Descriptions” for continuing use by school board personnel assigned the responsibility of maintaining the job description and titling plan structures.

Compensation Plan

The project scope requires a comprehensive compensation survey resulting in a base pay structure for all positions. While it is not specified in the RFP, we would also provide a suggested “stipend” structure consistent with the requirements of Act No. 1. The scope requirements also include an internal salary relationship guideline.

Typically, the development of a compensation plan includes job analysis (see classification plan), job evaluation, salary structure development/market pricing, internal equity analysis and policy development. All indicated elements are included in the scope of this project with the exception of the job evaluation phase. Given the unique requirements of an education compensation plan, this step in the process may not be necessary, but will be discussed during the initial meeting with the project team.

The methodology employed for this phase of the project includes:

- Review of all project scope activities with the designated project team
- Determine the specific compensation entities to be used in the compensation survey (for non-school board data which can be obtained readily over the internet, we would use the Economic Research Institute’s compensation modeling tool for the purpose of obtaining compensation data for non-educational positions)
- Obtain compensation survey data and develop a survey analytical tool for the purposes of analytical review and internal salary analysis.
- Analyze data and develop a comparative compensation summary
- Review analysis and findings with the designated project team
- Conduct a comparative analysis to determine internal equity issues
- Identify internal relationship outliers and provide relevant best practices
- ****Assist the designated project team with the development of policies and procedures to manage the compensation system**
- Prepare a compensation survey study and internal equity analysis presentation
- Meet with the appropriate bodies to discuss the results of the compensation survey study

****NOTE:** Due to P&N’s current role as the School Board’s external auditors, we cannot actually develop policies and procedures to manage the compensation system. However, our team will assist the School Board’s project team with this task and can provide objective best practices and/or suggestions.

TIMELINE

Listed below is a tentative timeline with key tasks for the classification and compensation study services proposed based on the key dates provided in the RFP. If needed, P&N can work with you to adjust this timeline to better fit your needs.

Key Tasks	Week 1	Week 2	Week 3	Week 4	Week 5	Week 6	Week 7
Hold preliminary meeting with project team to discuss scope, plan, and timelines							
Classification plan study							
Meet with project team to discuss classification plan results							
Compensation plan study							
Meet with project team to discuss compensation plan study results							
Prepare final project presentation							
Meet with project team, Superintendent and Board (if applicable)							

D. Costs

We believe that establishing and maintaining a mutually beneficial relationship with the School Board includes providing high-quality services at fair and competitive fees. We sincerely want your business and to mutually agree upon a fee structure that is reasonable to both of us. Our fee for the services outlined in this proposal is as follows:

Services	Professional Fees
Classification Study	\$14,750
Compensation Study	\$27,250
TOTAL	\$42,000

Out-of-pocket expenses are included in our basic rates and are not separately billed.

If you feel that these fees are not competitive, we would like the opportunity to provide additional explanations based on our understanding of your operations, internal controls structure, timeline, and other factors utilized to determine our fee estimate.

We make ourselves available for consultation, questions, and phone calls and do not charge additional fees for these services. Significant additional services not specifically mentioned in this proposal will be billed at the hourly rates outlined below. These rates reflect the current labor market conditions for high caliber professionals. P&N periodically reviews and adjusts these rates to stay in line with this continual demand.

Director	\$240	-	340
Associate Director	\$200	-	240
Manager	\$160	-	200
Senior	\$130	-	160
Staff	\$115	-	130

E. Prior Experience/References

As you know, the quality of services rendered by any professional services firm is highly dependent upon the individuals providing the services. Given this, our professional qualifications and service capabilities should be of primary importance to you in your selection process. We can think of no better way to support our claims than to provide you with references of key management personnel at some of our existing and recent clients for whom we have performed similar services. We invite you to make inquiries of the following clients to obtain their views about P&N.

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Client	Contact
East Baton Rouge Coroner's Office	William "Beau" Clark, Coroner 225-389-3047
Louisiana Hospital Association (LHA)	R. Scott White, Director of Human Resources 225-928-0026
Always Best Care (P&H Family Care, LLC)	Shonda Boudet, CEO 225-771-8605
McMains Children's Developmental Center	Renee Craft, Executive Director 225-923-3420
Arc of East Ascension	Norma Dukes, Executive Director 225-621-2000

CONFIDENTIAL

F. Sample Documents

As requested, we have included of the Job Analysis Questionnaire to be used to complete the School Board's project in **Appendix B**.

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G. Additional Information

In addition to our industry experience and involvement, professional personnel, and technical knowledge described in this proposal, we believe our commitment to your education, your evolving needs, the governmental industry, and client service makes us the best fit to provide professional services to the School Board.

COMMITMENT TO CLIENT EDUCATION

P&N strives to keep you informed of the latest news, issues, and other information that affects your organization. The fact that so many of our professionals are involved in professional organizations enables us to remain on the cutting edge of industry updates affecting your organization. P&N hosts frequent continuing professional education events for our clients.

Below is a partial list of some of our recently hosted additional seminars in which your staff or board may be interested:

- Governmental Seminar*
- Affordable Care Act Updates*
- Hot Topics for Financial Officers*

**These seminars are presented free of charge.*

Additionally, P&N provides periodic client newsletters and other communications in order to keep you informed of pertinent information and the latest developments in the governmental arena.

COMMITMENT TO CLIENT SERVICE

P&N is highly focused on delivering quality client service. We believe our team offers extensive technical ability, in-depth industry knowledge, and the highest level of client service.

We recognize that our clients are the reason we're in business. Providing the highest level of client service, technical ability, and industry knowledge is of utmost importance. We illustrate our commitment to our clients by investing our time and energy into providing value and helping them achieve success.

We sincerely hope to have the opportunity to demonstrate the quality of our services to the St. Charles Parish School Board.

Appendix A: Team Member Resumes

Bill Spann Associate Director



Bill Spann is an Associate Director with Postlethwaite and Netterville's Consulting Services Group in the Human Resources Consulting practice area. Prior to joining P&N, Bill served in the capacity of Human Resources Director for companies ranging from banking and financial institutions to healthcare providers. Bill was initially employed by P&N as the firm's Human Resources Manager and continues to provide internal consulting services to our firm as well as to our base of clients.

Bill has over 45 years of professional experience in the field of human resources dealing with issues including compensation plan modeling and processes, employment processes/I-9 compliance, employee benefits management, human resources policy development, strategic human resources planning, training and development, human resources information systems and professional coaching. His extensive experience and affiliated resources enable Bill to provide our clients with a professionally conducted resolution to almost all human resources-based needs.

EDUCATION & CREDENTIALS

- Bachelor of Arts, English, Louisiana State University
- Member, American Society for Training & Development, 1980 - 1995
- Member, World at Work (formerly American Compensation Association), 1980 - Present
- Lifetime Member, Greater Society for Human Resources Management
- Past President, Greater Baton Rouge Society for Human Resources Management, 1979
- Founding Member, Greater Baton Rouge Society for Human Resources Management, 1974 - Present
- Board Member, Theatre Baton Rouge, 2015 - Present
- Board Member, Heritage Ranch, 2009 - Present
- Past President & Member, Optimist Club, 1979 - 1992
- Past President & Board Member, School Board - Bishop Sullivan High School, 1999 - 2002
- Eucharistic Minister & Lector, St. George Catholic Church, 1996 - Present
- Council of Ministers Member, St. George Catholic Church, 1996 - Present

Helene Wall. SHRM-SCP

Associate Director



Helene Kaiser Wall, SHRM-SCP, is an Associate Director and Human Resources Consultant in the P&N Consulting Services Group. Prior to joining P&N in 2012, Helene worked in human resources compliance and management for financial and healthcare organizations.

Helene's experience includes serving as the human resources risk advisor for a variety of industries, such as construction, manufacturing and distribution, transportation, healthcare, financial institutions, education, restaurants, non-profit and professional services. In accordance with P&N's philosophy of giving back to the community,

Helene is also involved with college recruiting programs, professional associations and volunteer activities.

EDUCATION & CREDENTIALS

- Society for Human Resources Management - Senior Certified Professional
- Louisiana State University
- Member, Society for Human Resources Management (SHRM), 2012 - current
- Member, Greater Baton Rouge Society for Human Resources Management (GBR-SHRM), 2012 - current
- Vice President, Business Networking International (BNI) LA/MS-Premier Chapter, 2015 - 2016
- Member, Business Networking International (BNI) LA/MS, 2012 - current
- Fundraising Committee Chair/Member/Volunteer, Heritage Ranch Christian Children's Home, 2012 – 2015
- Board Member, Heritage Ranch Christian Children's Home, 2016 to current

Todd Tournillon, CPA

Director



Todd Tournillon, CPA, is a Director in the Postlethwaite & Netterville Accounting and Assurance Services Group. Todd joined the firm in 2000 and was promoted to Director in 2007. Prior to joining P&N, Todd worked for a large medical institution for three years.

His public accounting experience includes audits and reviews of a variety of clients, including construction, hospitality, gaming, transportation, government, oilfield services, auto dealerships, and non-profit organizations.

Todd is heavily involved with P&N's college recruiting programs and is involved with professional organizations at various local universities.

EDUCATION & CREDENTIALS

- Certified Public Accountant
- Bachelor of Science, Accounting, University of New Orleans
- Member, Louisiana Society of Certified Public Accountants
- Member, American Institute of Certified Public Accountants
- Graduated, New Orleans Regional Leadership Institute, 2009
- Board Member and Past President, University of New Orleans International Alumni Association
- Board Member and Treasurer, New Orleans Oyster Festival
- Board Member and Treasurer, What You Give Will Grow

Mark Staley, PMP Director



Mark D. Staley, PMP, is a Director in Postlethwaite & Netterville's Consulting Services Group. He became a Director in 2012. Prior to joining P&N, Mark worked for a consumer goods manufacturer and distributor as an IT Manager and was a Senior Consultant with a big four international consulting firm.

Mark has extensive professional experience with notable success leading teams in implementing and supporting a broad range of business and information technology initiatives with return on investment in the areas of process efficiency, reduced overhead and increased revenues. He is a decisive business leader who works and communicates effectively with all levels, articulates complex issues simply, and combines strong business acumen with the ability to conceive profitable and efficient solutions utilizing technology.

Mark has spent his career working with private and non-profit corporations within the health insurance, consumer packaged goods and manufacturing industries. He has extensive project management experience directing and participating in all phases of the project life-cycle for multi-year multi-phase engagements. He assists clients in the areas of business process reengineering, enterprise application implementation, enterprise reporting, data management, custom technology solutions, operational and financial data analysis, and disbursement management for class action settlements.

EDUCATION & CREDENTIALS

- Project Management Professional
- SAP R/3 Certified Consultant
- Siebel Certified Consultant
- Certified Sage Software Consultant
- Bachelor of Science, Information Systems and Decision Science, Louisiana State University
- Board of Directors, Project Management Institute, Baton Rouge Chapter, 2009 - Present
- Member, Project Management Institute, 2008 - Present
- Member, United States Tennis Association, 2004 - 2013
- Board of Directors, Baton Rouge Green, 2010-2014

Appendix B: Sample Documents



Job Analysis Profile – St. Charles Parish School Board

A position/job description is written to describe work currently organized and performed by a fully qualified employee who possesses knowledge, skills and experience required by the position. This Job Analysis Profile is designed to provide the information necessary to prepare the position/job description.

Employee:

Please answer all questions to the best of your ability. If you are unsure of the answer, please make a note of any question you have or comment that you feel is appropriate for discussion. Once completed, please forward the document to your immediate supervisor.

Supervisor:

Ensure that the form you receive has been completed in full by your direct report, including any areas where he or she may have made a comment or indicated they are unsure of the answer. Please answer all questions where indicated and once complete, please forward with any attachments to P&N.

PERSONS COMPLETING THIS FORM

Employee Name:		Today's Date:
Job/Position Title*:		Date started in this position:
Supervisor Name:		Today's Date:
Title:		Date started in this position:

Employee Complete This questionnaire is being completed for the following (may be the same as noted above *)

Job/Position Title:

BASIC PURPOSE AND SCOPE OF POSITION- Briefly describe the primary purpose of this position in the Company:

Employee Response

--

Supervisor Response

--

Job Analysis Profile – St. Charles Parish School Board

JOB DESCRIPTION - Employee to Complete

1. Do you have a printed copy of your job description? If yes, attach a copy.
2. Please complete the table below.

Briefly list the essential duties and responsibilities of your job as you understand them. Include all important aspects of the job, whether performed daily, weekly, monthly, or annually. Estimate the percentage of time spent in each primary responsibility. Be sure to account for **100%** of your time. Duties that account for 5% or less may be able to be combined with others into a more generic statement. If necessary, you may list additional duties on a separate piece of paper and attach it to the profile.

ESSENTIAL DUTIES AND RESPONSIBILITIES		%
1		
2		
3		
4		
5		
6		
7		
8		
9		
10		
TOTAL		100%

Considering the level (close, normal, limited) of supervision received and the level of discretion exercised during the normal workday, how often does the immediate supervisor review your job?

<input type="checkbox"/> Rarely	<input type="checkbox"/> Infrequently	<input type="checkbox"/> Occasionally	<input type="checkbox"/> Frequently	<input type="checkbox"/> Continually
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Job Analysis Profile – St. Charles Parish School Board

JOB DESCRIPTION - Supervisor to Complete

1. Does a written job description current exist for this position? If yes, attach a copy.
2. Please complete the table below:

Briefly list the essential duties and responsibilities of the job as you understand it. Include all important aspects of the job, whether performed daily, weekly, monthly, or annually. Estimate the percentage of time spent in each primary responsibility. Be sure to account for **100%** of the employee's time. Duties that account for 5% or less may be able to be combined with others into a more generic statement. If necessary, you may list additional duties on a separate piece of paper and attach it to the profile.

ESSENTIAL DUTIES AND RESPONSIBILITIES		%
1		
2		
3		
4		
5		
6		
7		
8		
9		
10		
TOTAL		100%

Considering the level (close, normal, limited) of supervision needed and the level of discretion exercised during the normal workday, how often do you review this job?

<input type="checkbox"/> Rarely	<input type="checkbox"/> Infrequently	<input type="checkbox"/> Occasionally	<input type="checkbox"/> Frequently	<input type="checkbox"/> Continually
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Job Analysis Profile – St. Charles Parish School Board

EDUCATION, EXPERIENCE AND TRAINING

Employee and Supervisor: Please insert an “X” at the level of education needed to successfully accomplish the essential duties of the job.

<u>Employee</u>	<u>Supervisor</u>	Description
		Level 1 – No prior education, experience or training
		Level 2 – Less than high school education
		Level 3 – High School Diploma/GED
		Level 4 – One year certificate from college/technical school
		Level 5 – Associate’s Degree (A.A.) or equivalent
		Level 6 – Bachelor’s Degree (B.A.) or equivalent
		Level 7 – Fifth year college/university program certificate
		Level 8 – Master’s Degree or equivalent
		Level 9 – Doctoral Degree or equivalent

Please list the specific licensure/certification necessary to perform the job, if any:

Type	Employee Response	Supervisor Response
License		
License		
License		
Certification		
Certification		

Please list the continuing education units (CEUs) necessary to maintain the license or certification, if any:

Type	Employee Response	Supervisor Response
	<input type="checkbox"/> None	<input type="checkbox"/> None
Continuing education units (CEU)	# hours annually _____	# hours annually _____
Continuing education units (CEU)	# hours annually _____	# hours annually _____
Other		

Job Analysis Profile – St. Charles Parish School Board

EXPERIENCE

Please insert an "X" at the level of experience needed to successfully accomplish the essential duties of the job.

<u>Employee</u>	<u>Supervisor</u>	Description
		Level 1 – No prior experience
		Level 2 – One month related experience.
		Level 3 – One to three months related experience.
		Level 4 – Three to six months related experience.
		Level 5 – Six months to one year related experience.
		Level 6 – One to two years' related experience.
		Level 7 – Two to four years' related experience.
		Level 8 – Four to ten years' related experience.
		Level 9 – More than ten years' related experience.

LANGUAGE SKILLS

Please insert an "X" at the level of language skills needed to successfully accomplish the essential duties of this job.

<u>Employee</u>	<u>Supervisor</u>	Description
		Level 1 – Ability to read a limited number of two- and three- syllable words.
		Level 2 – Ability to read and comprehend simple instructions, short correspondence and memos.
		Level 3 – Ability to read and interpret documents such as safety rules, operating instructions and procedural manuals.
		Level 4 – Ability to read, analyze and interpret general business periodicals, professional journals, technical procedures or governmental regulations
		Level 5 – Ability to read, analyze and interpret common scientific and technical journals, financial reports and legal documents
		Level 6 – Ability to read, analyze and interpret the most complex documents. Ability to respond effectively to the most sensitive inquiries or complaints.

Job Analysis Profile – St. Charles Parish School Board

MATHEMATICAL AND REASONING SKILLS

Please insert an "X" at the level of mathematical skills needed to successfully accomplish the essential duties of this job.

<u>Employee</u>	<u>Supervisor</u>	Description
		Level 1 – Ability to add/subtract two digit numbers and to multiply/divide 10's and 100's.
		Level 2 – Ability to add/subtract/multiply/divide in all units of measure using whole numbers, fractions and decimals. Ability to compute rate, ratio and percent and to draw/interpret bar graphs.
		Level 3 – Ability to calculate figures and amounts such as discounts, interest, commissions, proportions, percentages, area, circumference and volume.
		Level 4 – Ability to work with mathematical concepts such as probability and statistical inference, and fundamentals of plane and solid geometry and trigonometry.
		Level 5 – Ability to apply advanced mathematical concepts such as exponents, logarithms, quadratic equations and permutations.
		Level 6 – Ability to comprehend and apply principles of advanced calculus, modern algebra and advanced statistical theory.

Please insert an "X" at the level of reasoning skills needed to successfully accomplish the essential duties of the job.

<u>Employee:</u>	<u>Supervisor:</u>	Description
		Level 1 – Ability to apply common sense understanding to carry out simple one- or two-step instructions
		Level 2 – Ability to apply common sense understanding to carry out detailed but uninvolved written or oral instructions.
		Level 3 – Ability to apply common sense understanding to carry out instructions furnished in written, oral, or diagram form.
		Level 4 – Ability to solve practical problems and deal with a variety of concrete variables in situations where only limited standardization exists.
		Level 5 – Ability to define problems, collect data, establish facts and draw valid conclusions. Ability to interpret extensive technical instructions in mathematical or diagram form and deal with several abstract and concrete variables.
		Level 6 – Ability to apply principles of logical or scientific thinking to a wide range of intellectual and practical problems. Ability to deal with nonverbal symbolism in most difficult phrases.

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ADDITIONAL DUTIES/RESPONSIBILITIES

Question	Employee Response	Supervisor Response
Does this position have access to confidential employee or Company information?	<input type="checkbox"/> Yes <input type="checkbox"/> No Provide Details:	<input type="checkbox"/> Yes <input type="checkbox"/> No Provide Details:
Does this position have access to or handle Company funds, bank accounts, credit cards, lines of credit, etc.?	<input type="checkbox"/> Yes <input type="checkbox"/> No Provide Details:	<input type="checkbox"/> Yes <input type="checkbox"/> No Provide Details:
Is it essential that the person in this position be able to communicate fluently in languages other than English?	<input type="checkbox"/> Yes <input type="checkbox"/> No Provide Details:	<input type="checkbox"/> Yes <input type="checkbox"/> No Provide Details:
Are there any other requirements such as frequent travel, shift/weekend coverage, community involvement/chamber associations, networking groups, etc. necessary to perform this job?	<input type="checkbox"/> Yes <input type="checkbox"/> No Provide Details:	<input type="checkbox"/> Yes <input type="checkbox"/> No Provide Details:

SUPERVISORY RESPONSIBILITIES

Question	Employee Response	Supervisor Response
Does this position supervise any <i>non-supervisory</i> employee(s)?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Does this position supervise any <i>lower level supervisors</i> (Ex: Assistant Manager, Team Leader)?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

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PHYSICAL EFFORT

Please insert an "X" identifying the amount of time spent performing each activity. Please make only 1 choice for each Activity.

Activity	Amount of Time Spent Employee Response				Amount of Time Spent Supervisor Response			
	None	Under 1/3	1/3-2/3	Over 2/3	None	Under 1/3	1/3-2/3	Over 2/3
Standing								
Walking								
Sitting								
Touching, Feeling, Handling								
Lifting up to 10 lbs.								
Lifting up to 25 lbs.								
Lifting up to 50 lbs.								
Lifting up to 100 lbs.								
Climbing								
Balancing								
Stooping, Kneeling, Crouching, Crawling								
Reaching								
Speaking								
Hearing								
Seeing								
Tasting, Smelling								

VISION REQUIREMENTS

Please insert an "X" indicating ALL or ANY of the special vision requirements of the position, if any:

Activity	Employee Response	Supervisor Response
Close vision – 20 inches or less		
Far vision – 20 feet or more		
Color vision		
Peripheral vision		
Depth perception		
Adjust focus		
No special vision requirements		

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TOOLS AND EQUIPMENT

Please provide a detailed description of the tools/equipment used AND insert an "X" indicating the amount of time spent using the tool, equipment or machinery:

Provide Name or Type of Tool/Equipment/Machinery (Hammer, Fork-lift, etc.)	Amount of Time Spent Employee Response				Amount of Time Spent Supervisor Response			
	None	Under 1/3	1/3-2/3	Over 2/3	None	Under 1/3	1/3-2/3	Over 2/3
<input type="checkbox"/> None								

WORKING CONDITIONS

Please complete the following table by inserting an "X" to indicate the amount of time exposed to the following conditions:

Exposure	Amount of Time Spent Employee Response				Amount of Time Spent Supervisor Response			
	None	Under 1/3	1/3-2/3	Over 2/3	None	Under 1/3	1/3-2/3	Over 2/3
Wet, humid conditions (not weather-related)								
Near moving mechanical parts								
In high, precarious places								
Fume/airborne particles								
Toxic/caustic chemicals								
Outdoor weather								
Extreme cold (not weather-related)								
Extreme heat (not weather-related)								
Risk of electrical shock								
Risk of radiation								
Vibrations								
Loud noises								
Blood/bodily fluids								
Pathogens								

Employee-Additional Comments

☐ Yes ☐ No

If yes, please provide comments here:

Supervisor-Additional Comments

☐ Yes ☐ No

If yes, please provide comments here: