



ElderSource (Area Agency on Aging)  
Board of Directors  
Ad Hoc Personnel Committee Meeting  
Wednesday, December 9, 2020, at 11:00 AM  
Via Zoom  
<https://us02web.zoom.us/j/83290494450>

- |   |                         |
|---|-------------------------|
| 1. Welcome                                | Walette Stanford, Chair |
| 2. Review of Minutes                      | Walette Stanford, Chair |
| 3. ElderSource HR and Fiscal Presentation |                         |
| 4. Adjourn                                | Walette Stanford, Chair |

Vision: Older adults and adults with disabilities are valued and have the resources they need to live with dignity and security in an age- and ability-friendly community.

Mission: ElderSource empowers people to live and age with independence and dignity in their homes and their communities.

Inclusion Statement: ElderSource values all people – including but not limited to all nationalities, socio-economic backgrounds, abilities, races, genders, religious perspectives, sexual orientations and gender identities – in everything we do. We welcome the unique insights and perspectives of all persons in our quest to fulfill our mission.

ElderSource Board of Directors  
Meeting of the  
Personnel Committee  
November 12, 2020 –1:00 PM  
Zoom Conference Call

MINUTES

**Present:**

Walette Stanford, Chair  
Catherine Kelly  
Jenny Higginbotham Barrett

**Staff Present:**

Linda Levin, Chief Executive Officer  
James Lee, Chief Financial Officer  
Tameka G. Holly, Chief Operations Officer  
Bernadette Brown, Employee Experience Manager  
Jessica Del Rio, Executive Administrative Assistant

**Guest**

Tom Masters, DCSI  
Betsy Giblin, DCSI  
Sarah Laboranti, DCSI

**Meeting Called to Order:**

Chair, Walette Stanford, called the meeting to order at 2:05 PM. A quorum was present.

**DCSI Compensation Study Presentation**

In advance of their meeting, the Personnel Committee members received copies of the ElderSource Compensation Analysis and Recommendation Report and Compensation and Classification Study.

Betsy Giblin presented the DCSI presentation on the Compensation and Classification Study. The project scope consisted of the following items:

- Analysis of existing job classifications and structure
- Peer salary and benefits study
- Market pricing of all current positions
- Parity analysis to ensure internal equity
- Alternative compensation models

### Methodology

Betsy stated that the methodology they used on the project with Market Pricing Sources is the following:

- CompAnalyst
  - The primary tool used in the project
  - 100% employer reported data; collected from hundreds of yearly, professionally-conducted surveys; reliable, credible source for conducting compensation analysis
- Northeast Florida Nonprofit Compensation and Benefits Report – 2020 survey published by the Nonprofit Center of Northeast Florida
- Peer Data – 8 peer agencies identified
  - Seven out of eight agencies completed the Compensation and Benefits survey
    - PSA5 (Pasco/Pinellas)
    - PSA6 (Tampa)
    - PSA7 (Orlando) – Compensation data only
    - PSA8 (Fort Myers) – Benefits data only
    - PSA9 (West Palm)
    - PSA10 (Broward)
    - PSA11 (Miami-Dade)

Betsy stated that the Scope data, such as industry, geographic location, and organization size, were used to refine further the data match between the survey sources and ElderSource jobs.

Betsy noted the following Scope Data used:

- Sector – Non-Profit; Government
- Industries – Social & Legal Services; Public Administration
- Geography – Jacksonville, FL (Metropolitan area)
- Size – 50 - 100 employees

### Compensation Structure Review

Betsy stated that ElderSource's compensation structure was found to be 3.9 percent below the market. Of the 39 job titles:

- Thirteen were ahead of the market at the midpoint;
- Fifteen were no more than 10 percent behind the market at range midpoint;
- Ten were between 10 and 20 percent behind the market; and
- One was greater than 20 percent behind the market.

### Employee Pay Analysis

Betsy stated that under ElderSource's pay analysis, employees were found to be, on average, 11 percent below the market midpoint. The results of the discussion of pay equity review were based on gender, ethnicity, and age. No minimum wage issues were identified. Four cost-option models provided for consideration

Betsy reviewed the following Cost Option Models with the Committee:

Option	Rationale	Cost	Employees Adjusted	Avg \$\$ Increase	Avg % Increase
Option One - Bring to Min	- Ensures employees are at a minimum of the salary range.	\$29,294	7	\$4,185	15%
Option Two - Range Penetration	- Assumes organization is comfortable with current internal equity.	\$120,006	23	\$5,218	11%
Option Three - Market Midpoint	- Depending on org's compensation philosophy, it ensures salaries are aligned.	\$283,250	48	\$5,901	16%
Option Four - Tenure Parity	- Provides a uniform way to slot employees based on experience.	\$181,518	26	\$6,981	15%

To address Walette's question, Betsy stated that as part of the study, DCSI reviewed the benefits offered by ElderSource compared to the identified peer agencies' benefits. She stated that those key findings from the benefits survey include the following:

- Peer organizations reported benefits as a percent of a base salary plus benefits at 25.5%
  - ElderSource is at 23.2%.
- The number of paid holiday report by peers was between 9 and 10.5 days
  - ElderSource provides ten paid holidays.
- For PTO, vacation, and sick days combined, peers reported providing 22.4 hours after one year of service, 27.6 hours after five years of service, 31.8 hours after ten years of service, and 31.8 hours after twenty-five years of service.
  - ElderSource provides 20 hours after one year of service, 24 hours after five years of service, 28 hours after ten years of service, and 40 hours after twenty-five years of service.

Compensation Analysis and Recommendations report

Tom Masters reviewed the Compensation Analysis and Recommendations report with the Committee. Tom stated that on the Base Salary versus Market ElderSource has thirteen positions that are on or above Midpoint range, fifteen positions fell between 1.0% and 10%, ten positions that fell between 10% and 20%, and there was only one position that fell below 20%. Tom stated overall, ElderSource is 3.9% below market and 31% average range spread. Range spread is the difference between the minimum and maximum of a pay range. The ideal range spread is between 40% and 60%. Betsy noted that this report is based on the job description of the positions.

### Pay Structure

Tom reviewed the Pay Structure report with the Committee. He stated that on ElderSource's current pay structure, there are thirteen pay grades, the range widths vary from 40% to 60%, and the midpoint differentials vary from 6% to 22%. There are twenty five pay grades on the proposed pay grade salary structure, and the suggested range width is 50%. The proposed midpoint differentials are at a consistent 7%. With the consistent 7%, this prevents having to add grades to accommodate future roles or adjustments. Betsy suggested in getting comfortable with the paygrade structure before considering any pay increases.

### Data Summary

Tom reviewed the data summary sheet with the Committee. Option one: bring individuals to a minimum, if an employee's salary falls below the minimum of the proposed range, the employee is brought to the minimum of the proposed range. There are seven employees listed to bring up to the minimum. Tom stated that this option is cost-effective and the compression is at a minimum.

In option two: range penetration, the employee's current range penetration is applied to the new pay range. If the employee's salary falls below this point, the employee is brought up to this point. There are twenty-three employees listed under these options. Tom reviewed stated that this option maintains current internal equity and avoids creating new compression issues.

In option three: market midpoint, all employees are brought to the midpoint of the proposed range if under midpoint at the current salary level. Tom stated that this is the most expensive option, and there is compression at the midpoint.

In option four: tenure parity, employees are slotted into the proposed range based on tenure; based on a 15-year career. Based on the 15-year career model, there are twenty-six employee salaries to be adjusted. Tom stated that this option has a systematic approach to compression based on ElderSource's tenure versus role tenure

The Committee agreed at the next Personnel meeting in December 2020; they will continue to review the DCSI Compensation Study, with the addition of the budget. Staff were asked to present a compensation philosophy and recommendations.

**Meeting adjourned at 2:02 PM**

**Ms. Jessica Del Rio, Executive Administrative Assistant, prepared the minutes.**

# **ElderSource**

## **Compensation and Classification Study Executive Summary**

### **November 2020**



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***Appendix A – Proposed Pay Grade Structure***

***Appendix B – Benefits Survey Responses***

## **I. Project Scope**

ElderSource engaged Dynamic Corporate Solutions, Inc. (DCSI) to perform a Compensation and Classification Study. The scope for this project included the following:

- a) An analysis of existing job classifications;
- b) An external salary study for all regular full-time and part-time positions using appropriate competitive markets; whether by organizational status, location, size, budget, etc.;
- c) An analysis of the agency's total benefits program as a percentage of compensation costs compared to similar organizations;
- d) A parity analysis to ensure internal equity, including estimated implementation costs;
- e) A discussion of alternative compensation models for future consideration;
- f) A detailed report with recommendations for implementation and maintenance of proposed improvements, any opportunities to enhance the agency's internal system of job placement assessments;
- g) Presentation of findings to Board of Directors and agency's leadership.

## **II. Project Methodology**

### ***Compensation and Benefits Resources***

#### ***Custom Survey***

At the request of ElderSource, a custom compensation and benefits survey was developed and utilized. Eight (8) Florida area agencies on aging were contacted for participation and six (6) of the agencies completed the survey. This survey was comprised of data from the following Provider Service Area (PSA) agencies:

- PSA5 (Pasco/Pinellas)
- PSA6 (Tampa)
- PSA7 (Orlando) – Compensation data only
- PSA8 (Fort Myers) – Benefits data only
- PSA9 (West Palm)
- PSA10 (Broward)
- PSA11 (Miami-Dade)

The datasets were aggregated, consistent with safe harbor rules for surveys. Data was analyzed and percentiles, percentages, and averages were calculated relevant to the required data and reporting

### ***CompAnalyst***

CompAnalyst is a compensation management software product from Salary.com. CompAnalyst was used to collect market data for benchmark jobs. CompAnalyst market data is collected from hundreds of professionally-conducted surveys run by corporate HR departments every year, so clients may rely upon the accuracy and timeliness of the information received. By using 100% employer-reported surveys instead of individually-reported responses, CompAnalyst's market data is a more reliable, credible source for conducting compensation analysis.

Within CompAnalyst, survey data was obtained from the following scope:

- Sector: Non-Profit; Government
- Industry: Social & Legal Services; Public Administration
- Geography: Northeast Florida
- Organization Size: 50-100 employees

### ***2020 Northeast Florida Nonprofit Compensation and Benefits Report***

This survey was used as a compensation source, as it includes relevant industry-related data. The survey was published in March 2020 by the Nonprofit Center of Northeast Florida.

### **III. Summary of Findings & Recommendations**

Following is a summary of the findings and recommendations. Please refer to the ElderSource Compensation Analysis & Recommendations report for the support and details.

#### ***Compensation Structure Development***

DCSI used the market data collected from all survey sources to review ElderSource's current compensation structure.

ElderSource's existing compensation structure includes the following components:

- ElderSource currently utilizes 13 pay grades.
- Range spread is between 40 and 60 percent for all existing grades.
- Midpoint progression varies between 6 and 22 percent.

Following are the key findings from the market salary survey:

- ElderSource's compensation structure was found to be 3.9 percent below market.
- Of the 39 job titles surveyed, 13 positions showed a positive market variance when comparing range midpoint to market midpoint; 15 were found to be no more than 10 percent behind market at range midpoint; 10 were found to be between 10 and 20 percent behind market; and 1 was found to be greater than 20 percent behind market.
- Average range spread reported by the market is 31 percent across all positions.
- Compa-ratio across all ElderSource employees is approximately .89, or approximately 11 percent behind the market midpoint.

*Refer to tab 1 – Market Analysis – this tab shows the ElderSource current pay grade midpoint compared to the midpoint of the market pricing from the peer surveys, CompAnalyst and NPC report (Note: Peer salary data was annualized to 2080 hours when peer organizations reported standard hours of less than 2080 hours.)*

#### ***Cost of Labor***

A detailed cost of labor review was completed to determine the impact of cost in each peer geographic area. Based on the analysis and cost of labor indices reported as of 10/1/20, no cost of labor adjustment is recommended for peer submissions.

*Refer to tab 2 – COL for this analysis.*

Based on market findings and compensation best practices, the proposed compensation structure includes 25 pay grades, with a consistent range spread of 50 percent and a flat midpoint progression between all pay grades of 7 percent. The proposed structure increases the midpoint for ElderSource roles by an average of 5 percent to address external competitiveness.

The proposed range spread is competitive with market peers, and the midpoint progression allows ElderSource to add new roles at a midpoint that is competitive with the market. With a market competitive pay range midpoint, ElderSource can then focus on compensating those tenured employees that are fully competent in their roles at a market competitive position, as well as ensuring salaries for newly hired employees at or near the minimum of the range are competitive with market starting rates.

Example:

Assume ElderSource conducts a small market survey for a new role in 2021. The new role's market midpoint is found to be \$54,500. In the current structure, this role would be slotted into either grade 5, with a midpoint of \$49,021, or grade 6, with a midpoint of \$59,826. Slotting at either of these two pay grades would misalign the ElderSource midpoint against market; either deflating the value of the job by approximately 10 percent or inflating the value of the job by approximately 10 percent.

In the proposed structure (excerpt displayed below), ElderSource is able to position the job at a grade more aligned with market midpoint. Specifically, the job could be slotted at a grade 11 where the midpoint is approximately 1.4 percent from market midpoint. This allows the organization to avoid overpaying for the role, ensures close alignment to external peers, and provides a true market-based pay range for the role.

Grade	Minimum	Market Based Midpoint	Maximum	Range Width	Midpoint Differential
10	\$41,329.00	\$51,660.70	\$61,993.00	50.00%	7%
11	\$44,222.00	\$55,276.95	\$66,332.00	50.00%	7%
12	\$47,317.00	\$59,146.34	\$70,976.00	50.00%	7%

*Refer to tab 3 – Pay Structure – this tab shows ElderSource's current Pay Grade structure, the recommended new Pay Grade Structure, and the proposed slotting of job titles into the proposed Pay Grade Structure. See also "Appendix A - Proposed Pay Grade Structure".*

### **Individual Compensation and Cost Modeling Options**

Once jobs were slotted into the new pay grades, the next step was to review individual employee rates of pay and provide cost options for implementing the structure.

Part of this review was to ensure cost options address internal equity, external competitiveness, and legal requirements such as minimum wage. In no instance is an employee's salary recommended for reduction as part of an implementation option. It will be important to consider the organization's compensation philosophy, pay policies, and budget impacts to determine the best method of aligning employee pay to the market.

Adjustments to base pay may need to be accomplished over time as budget dollars are available. It is recommended that a consistent method of determining increase eligibility and amounts be utilized. For each model, a multi-year approach can be considered.

The following cost models are presented for consideration:

- **Option 1 – Bring to Minimum:** In this model, if an employee's salary falls below minimum of the proposed range, the cost is associated with bringing that employee to the minimum of their role's assigned pay range. The total cost impact of this model is **\$29,294**. This includes adjusting the salaries of 7 employees, for an average increase of \$4,185 or 15 percent.
- **Option 2 – Range Penetration Parity:** In this model, employees are placed into their new pay range at the same percentage above minimum as they were in their current pay range. The total cost impact of this model is **\$120,006**. This includes adjusting the salaries of 23 employees, for an average increase of \$5,218 or 11 percent.
- **Option 3 – Market Midpoint:** In this model, employees whose salaries are identified as being below midpoint are brought to midpoint. For employees whose salaries are currently above midpoint, no action is taken. The total cost impact of this model is **\$283,250**. This includes adjusting the salaries of 48 employees, for an average increase of \$5,901 or 16 percent.
- **Option 4 – Tenure Parity:** In this model, employee salaries are determined based on their tenure within the organization, where an employee with more tenure would be expected to have a higher salary within their applicable salary range. The total cost impact of this model is **\$222,406**. This includes adjusting the salaries of 31 employees, for an average increase of \$7,174 or 16 percent.

Note that the costs calculated are based on implementing within one year, and a phased multi-year approach may be preferred. In addition, there are associated pros and cons with each when it comes to factors such as internal equity. For example, the Tenure Parity model provides a uniform method to address internal equity, whereas the Market Midpoint model ensures that the organization is paying competitive with market midpoint but at the cost of potential compression issues.

*Refer to tab 4 – Data Summary – this tab summarizes all of the compensation recommendations to include:*

- *Market Data to include the Overall Market Average of all the market pricing sources*
- *Proposed Pay Grade for each employee/job title*
- *Four cost modeling options, broken out by employee*
- *Gender, Race, and Age Equity analysis*

- *Minimum Wage analysis*

*Refer to tab 5 – Cost Options – this tab describes and summarizes the four cost modeling options.*

### ***Internal Equity***

As part of this study, DCSI completed a review of employee base-pay in regard to gender, ethnicity, and age. The review uncovered a very limited number of potential issues, which will be further reviewed with the organization's leadership team. The potential issues identified will likely be addressed through implementation of the options provided above.

*Refer to tab 4 – Data Summary, for the Gender, Race, and Age Equity analysis*

### ***Benefit Analysis Summary***

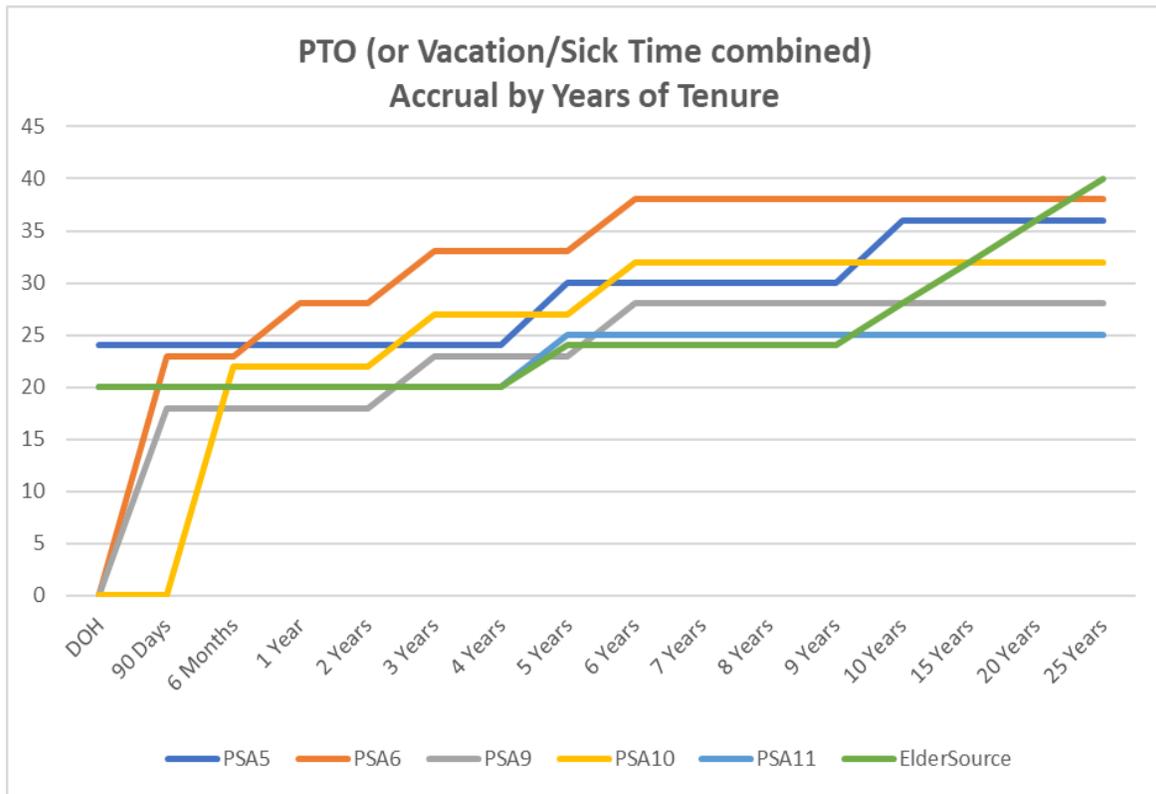
As part of the study, DCSI reviewed the benefits offered by ElderSource compared to the benefits of the identified peer agencies. In many cases, an apples to apples comparison is difficult when it comes to benefits offerings, given that the attributes of an organization's workforce (age, elections, etc.) drive the benefits costs and offerings of that organization.

Key findings from the benefits survey include the following (note that charts/graphs are provided in select cases to demonstrate the data collected):

- Peer organizations reported benefits as a percent of base salary plus benefits at 25.5 percent; comparatively, ElderSource is at 23.2 percent.
- The number of paid holidays reported by peers was between 9 and 10.5 days; comparatively, ElderSource provides 10 paid holidays.
- Peers reported an average of 2.2 personal days versus 2 days provided by ElderSource.
- For PTO, vacation, and sick days combined, peers reported providing 22.4 days after one year of service, 27.6 days after 5 years of service, 31.8 days after 10 years of service, and 31.8 days after 25 years of service. Comparatively, ElderSource provides 20 days after one year of service, 24 days after 5 years of service, 28 days after 10 years of service, and 40 days after 25 years of service.

**Exhibit 1** displays a graphical comparison of PTO (or vacation/sick time combined) accrued by years of service.

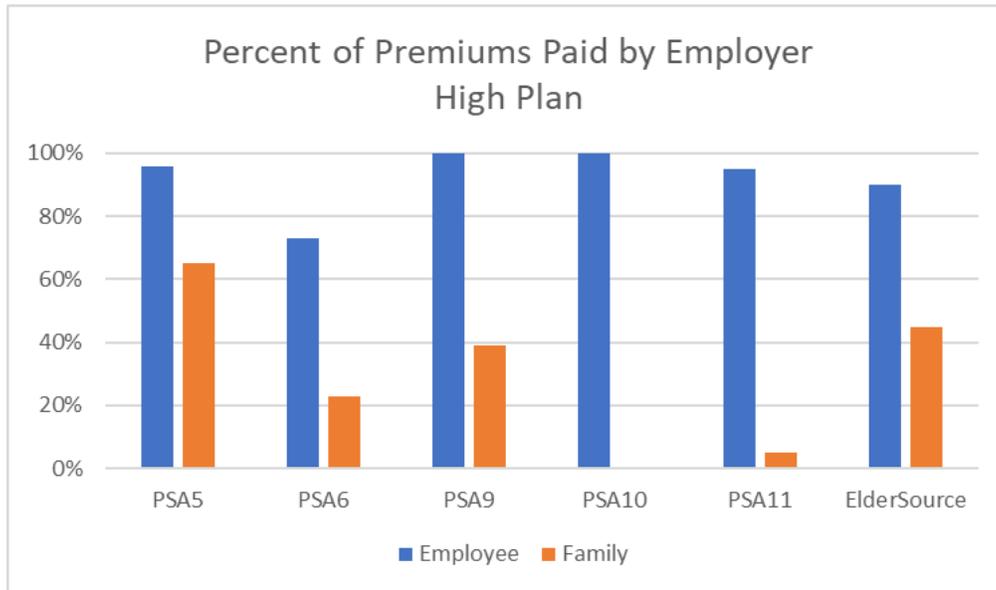
**Exhibit 1**



- Regarding medical benefits (highest plan offered), peers reported covering 93 percent of the employee premium and 26 percent of the family premium, and an average deductible for employee only and family of \$3,167 and \$6,667, respectively. ElderSource covers 90 percent of the employee premium and 45 percent of the family premium, and offers a deductible of \$2,500 for employee only and \$5,000 for family.

**Exhibit 2** provides a graphical overview of the percent of premiums paid by the employer for employee only and family coverage on the high plan.

**Exhibit 2**



- Regarding medical benefits (lowest plan offered), peers reported covering 86.7 percent of the employee premium and 22 percent of the family premium, and an average deductible for employee only and family of \$2,125 and \$4,250, respectively. ElderSource covers 90 percent of the employee premium and 40 percent of the family premium, and offers a deductible of \$1,500 for employee only and \$3,000 for family.
- Only one peer reported providing an incentive (\$75.01/month) for opting out of medical coverage, whereas ElderSource provides pays employees 50% of the 90% premium for those opting out of medical coverage.
- For dental coverage, peers reported covering 56 percent of the employee premium and 6 percent of the family premium. The average peer deductible is \$45.83 for individual and \$137.50 for family. Comparatively, ElderSource covers 90 percent of the employee premium and 28 percent of the family premium; annual deductibles are \$50 for individual and \$150 for family.
- All peers offer vision coverage, but only one peer pays for all or part of the employee premiums.
- Two peers offer employer-paid short-term, while ElderSource and three peers offer it as a voluntary (employee-paid) benefit.
- Fifty percent of the peers offer employer-paid long term disability, while ElderSource and one peer offer it as a voluntary (employee-paid) benefit.

- For peers that offer profit sharing as part of their retirement plan, the average percent offered is approximately 7.5 percent. Only one peer indicated that the amount is discretionary vs guaranteed, and only one peer offered both 401k matching and profit sharing. ElderSource offers 10 percent guaranteed profit sharing. ElderSource allows participation after 1 year of service and then a five-year vesting period which is slightly higher than the 3.8 year average vesting period reported by peers.

ElderSource offers stronger benefits in some areas and weaker benefits in other areas. Overall, the benefits offered by ElderSource are similar to the peer benefits packages. The complete benefits survey responses can be found in **Appendix B**.

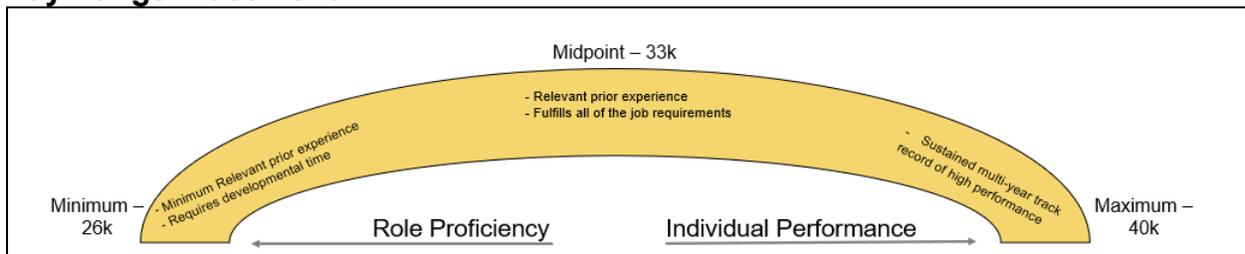
## IV. Ongoing Administration

### **New Employee Start Rates**

In addition to recommendations on pay structure, ElderSource requested guidance on new employee start rates. It is important for an organization to establish a consistent methodology for new hire salaries. Generally, a number of factors are taken into account when determining new hire rate such as the candidate's education and experience as well as internal equity, market rate, and departmental budget.

**Exhibit 3** provides general guidance on where employees should fall within their assigned pay range. For example, an individual new to role, with limited prior experience, and requiring development time should expect to be compensated at or near the minimum of the range. Whereas an individual who has significant prior experience and can fulfill all the duties of the role should expect to be compensated at midpoint of the range. An individual who has tenure in the role, and displays high performance, should expect to be compensated between midpoint and maximum.

### **Exhibit 3 Pay Range Placement**



It is recommended that ElderSource adopt a policy for establishing new hire rates of no greater than midpoint of the pay range. Given that only five employees are currently compensated above midpoint of their proposed ranges, it is recommended that new hire rates be established **at** the pay range minimum or within 10 percent of the pay range minimum. This will reduce future internal equity issues.

When determining new hire rates, rates of existing employees in the same role must be considered. Any new hire rates above ten percent of the minimum should be submitted with supporting business rationale to the CEO and require CEO approval.

A sample policy is provided below that ElderSource may choose to adopt.

## SAMPLE HIRING POLICY

*Starting Rates – (New Hires) Determination of starting pay for new hires is made by the hiring manager and is based on the following factors:*

- a) Salaries offered to new employees must be within the applicable pay range.*
- b) The candidate's qualifications and work experience relative to the job requirements.*
- c) Current pay levels of incumbents in the same or similar positions within the Department.*
- d) Hiring managers are encouraged to reference salaries of current job incumbents prior to making the initial salary determination.*

### *New Hire Salary Guidelines*

- a) The normal hiring range for new external employees is between the minimum and midpoint of the pay range. New hires meeting the requirements for the position, but possessing less than one year of relevant experience for the job will normally be hired at the minimum for the pay range. Candidates with more significant experience and qualifications may be hired closer to the midpoint of the pay range.*
- b) Hiring within the normal hiring range will provide the greatest future incentive for the merit increases based on achievement. It also assures salary expense control in the absence of demonstrated performance*
- c) There may be occasions when a candidate's qualifications and relevant work experience warrant a starting salary that is greater than the midpoint of the pay range. Relevant experience is defined as those skills and attributes identified in the job description and uniformly recognized in the external market.*
- d) All requests for hiring rates above the normal hiring range must be submitted to Human Resources for review and approval with concurrence from the CEO.*

## **Ongoing Internal Administration**

DSCI recommends three actions for ongoing internal administration of the organization's compensation system:

1. For new or revised roles, or roles experiencing recruitment or retention issues, conduct a small-scale salary survey of market peers to determine if the role is slotted into the appropriate pay grade.
2. On an annual basis, survey peer organizations to determine if adjustments are being made to their compensation structures. That is, if peer organizations are making COL adjustments to their structures. If ElderSource determines that peer organizations are adjusting their compensation structures (i.e. pay range values), ElderSource should do the same.

3. Conduct a comprehensive classification and compensation study every three to five years. While actions 1 and 2 will ensure the compensation system is maintained, this third action will ensure that the organization's compensation structure is holistically reviewed and updates are made in a timely manner.

These recommendations will help ensure ElderSource's compensation program remains competitive and equitable, and that system administration practices will keep the system healthy for years to come.

**APPENDIX A: ElderSource Proposed Pay Grade Structure**

<b>JOB TITLE</b>	<b>PAY GRADE</b>	<b>MINIMUM</b>	<b>MIDPOINT</b>	<b>MAXIMUM</b>
Front Office Assistant/Receptionist	1	\$22,480	\$28,100	\$33,720
Administrative Assistant	3	\$25,737	\$32,172	\$38,606
Customer Service Specialist	3	\$25,737	\$32,172	\$38,600
SHINE Advocate	3	\$25,737	\$32,172	\$38,606
Benefits Enrollment Center Assistant	3	\$25,737	\$32,172	\$38,606
Intake Specialist	4	\$27,539	\$34,424	\$41,308
Benefits Enrollment Center Coordinator	5	\$29,467	\$36,833	\$44,200
Benefits Specialist	5	\$29,467	\$36,833	\$44,200
Volunteer Coordinator	5	\$29,467	\$36,833	\$44,200
Fiscal Specialist	5	\$29,467	\$36,833	\$44,200
SHINE Outreach (PT)	6	\$31,529	\$39,412	\$47,294
Customer Service Specialist II	6	\$31,529	\$39,412	\$47,294
Benefits Specialist Lead	7	\$33,736	\$42,171	\$50,605
Contracts Manager Aide	7	\$33,736	\$42,171	\$50,605
Executive Admin Assistant	7	\$33,736	\$42,171	\$50,605
Caregiver Coalition Coordinator	8	\$36,098	\$45,122	\$54,147
VDHCBS Consultant	8	\$36,098	\$45,122	\$54,147
Lead Customer Service Specialist	8	\$36,098	\$45,122	\$54,147
Planner	8	\$36,098	\$45,122	\$54,147
Special Projects Coordinator	8	\$36,098	\$45,122	\$54,147
Contracts Manager	8	\$36,098	\$45,122	\$54,147
Communications Specialist	9	\$38,625	\$48,281	\$57,937
Contracts Manager/VA Program Coordinator	9	\$38,625	\$48,281	\$57,937
Intake and Screening Supervisor	10	\$41,329	\$51,661	\$61,993
Fiscal Specialist II	10	\$41,329	\$51,661	\$61,993
Helpline Supervisor	10	\$41,329	\$51,661	\$61,993
Medicaid Eligibility Supervisor	10	\$41,329	\$51,661	\$61,993
Employee Experience Manager	10	\$41,329	\$51,661	\$61,993
Senior Contracts Manager	10	\$41,329	\$51,661	\$61,993
SHINE Liaison	10	\$41,329	\$51,661	\$61,993

Staff Accountant	10	\$41,329	\$51,661	\$61,993
CIRTS Administrator	11	\$44,222	\$55,277	\$66,332
Senior Accountant	13	\$50,629	\$63,287	\$75,944
IT Director	14	\$54,173	\$67,717	\$81,260
VP of Communications	15	\$57,965	\$72,457	\$86,948
VP of Development	15	\$57,965	\$72,457	\$86,948
VP of Planning & Programs	16	\$62,023	\$77,529	\$93,035
VP of Community Services	16	\$62,023	\$77,529	\$93,035
Chief Operations Officer	18	\$71,010	\$88,763	\$106,515
Chief Financial Officer	19	\$75,981	\$94,976	\$113,971
Chief Executive Officer	25	\$114,027	\$142,534	\$171,040

**APPENDIX B: Summary of 2020 ElderSource Benefits Survey Responses**

<b>Benefit</b>	<b>PSA5</b>	<b>PSA6</b>	<b>PSA8</b>	<b>PSA9</b>	<b>PSA10</b>	<b>PSA11</b>	<b>ElderSource</b>
<b>TIME OFF BENEFITS</b>	Vacation, Sick and Flex (Personal) Days; pro-rated for p/t employees	Vacation, Sick, Personal Days; pro-rated for p/t employees	n/a	Personal days, sick; pro-rated for p/t employees	Vacation, Sick; full-time and part-time employees	PTO and Personal Days; full-time employees only	PTO and Personal Days; pro-rated for p/t employees
<b>Number of Paid Holidays:</b>	9	10		10	9	10 ½	10
<b>Number Personal Days</b>	4 personal (flex) days per year	2 personal days (15 hours) per year		3 personal days per year	0	2	2 personal days per year (1 day if hired after June 30)
At Date of Hire	4					2	2
After 60 days				3			
After 90 days of service		2					
After six months of Service							
After One year of Service							
<b>Number Sick Days</b>	12	13		8	12	N/A	N/A
At Date of Hire	Can start taking accrued				Can start taking as accrued		
After 60 days				Can start taking accrued			
After 90 days of Service		Can start taking accrued					
After six months of Service							
After One year of Service							

**Summary of 2020 ElderSource Benefits Survey Responses**

<b>Benefit</b>	<b>PSA5</b>	<b>PSA6</b>	<b>PSA8</b>	<b>PSA9</b>	<b>PSA10</b>	<b>PSA11</b>	<b>ElderSource</b>
<b>Number Vacation Hours/Days</b>	Vacation days accrue	Vacation days accrue		Vacation days accrue	Vacation days accrue	N/A (PTO)	N/A (PTO)
Upon date of hire	96/12			80/10			
After 90 days of service	96/12	75/10		80/10			
After 6 months of service	96/12	75/10		80/10	80/10		
After One year of Service	96/12	112.5/15		80/10	80/10		
After 2 years of Service	96/12	112.5/15		80/10	80/10		
After 3 years of Service	96/12	150/20		120/15	120/15		
After 4 years of Service	96/12	150/20		120/15	120/15		
After 5 years of Service	144/18	150/20		120/15	120/15		
After 6 years of Service	144/18	187.5/25		160/20	160/20		
After 7 years of Service	144/18	187.5/25		160/20	160/20		
After 8 years of Service	144/18	187.5/25		160/20	160/20		
After 9 years of Service	144/18	187.5/25		160/20	160/20		
After 10 years of service	192/24	187.5/25		160/20	160/20		
After 15 years of service	192/24	187.5/25		160/20	160/20		

**Summary of 2020 ElderSource Benefits Survey Responses**

<b>Benefit</b>	<b>PSA5</b>	<b>PSA6</b>	<b>PSA8</b>	<b>PSA9</b>	<b>PSA10</b>	<b>PSA11</b>	<b>ElderSource</b>
<b>Paid Time Off (PTO)</b>						Paid Time Off; full-time employees only	Paid Time Off; prorated for p/t employees
Upon Date of Hire						160/20	160/20
After 90 days of Service						160/20	160/20
After 6 months of Service						160/20	160/20
After One year of Service						160/20	160/20
After Two years of Service						160/20	160/20
After Three years of Service						160/20	160/20
After Four years of Service						160/20	160/20
After 5 years of Service						200/25	192/24
After 6 years of Service						200/25	192/24
After 7 years of Service						200/25	192/24
After 8 years of Service						200/25	192/24
After 9 years of Service						200/25	192/24
After 10 years of service						200/25	224/28
After 15 years of service						200/25	256/32
After 20 years of service						200/25	288/36
After 25 years of service						200/25	320/40
Do you put a cap on the accrual of time off benefits? (Yes or No)	Yes	Yes		Yes	Yes	Yes	Yes
Vacation/PTO Hours Accrual Cap	192	187.50		160		320	300
Do you Allow Time to be rolled over to the next year? (Yes or No)	Yes			Yes (vacation and sick)	Yes (vacation)	Yes	Yes
Vacation/PTO Rollover Cap	192	187.50		160	120	No limit	300

<b>Benefit</b>	<b>PSA5</b>	<b>PSA6</b>	<b>PSA8</b>	<b>PSA9</b>	<b>PSA10</b>	<b>PSA11</b>	<b>ElderSource</b>
<b>PTO (or Vacation/Sick Time combined)</b>							
Upon Date of Hire	192/24					160/20	160/20
After 90 days of Service	192/24	172.5/23		144/18		160/20	160/20
After 6 months of Service	192/24	172.5/23		144/18	176/22	160/20	160/20
After One year of Service	192/24	210/28		144/18	176/22	160/20	160/20
After Two years of Service	192/24	210/28		144/18	176/22	160/20	160/20
After Three years of Service	192/24	247.5/33		184/23	216/27	160/20	160/20
After Four years of Service	192/24	247.5/33		184/23	216/27	160/20	160/20
After 5 years of Service	240/30	247.5/33		184/23	216/27	200/25	192/24
After 6 years of Service	240/30	285/38		224/28	256/32	200/25	192/24
After 7 years of Service	240/30	285/38		224/28	256/32	200/25	192/24
After 8 years of Service	240/30	285/38		224/28	256/32	200/25	192/24
After 9 years of Service	240/30	285/38		224/28	256/32	200/25	192/24
After 10 years of service	288/36	285/38		224/28	256/32	200/25	224/28
After 15 years of service	288/36	285/38		224/28	256/32	200/25	256/32
After 20 years of service	288/36	285/38		224/28	256/32	200/25	288/36
After 25 years of service	288/36	285/38		224/28	256/32	200/25	320/40
Bereavement Leave (Yes or No)	Yes	Yes		Yes	Yes	Yes	Yes
	3 days (immediate family member)	3 days (local area); 5 days for overnight travel		3 days (immediate family member)	3 days (local area); 5 days for out-of-state	3 days (immediate family member)	2 days (immediate family member)

**Summary of 2020 ElderSource Benefits Survey Responses**

<b>Benefit</b>	<b>PSA5</b>	<b>PSA6</b>	<b>PSA8</b>	<b>PSA9</b>	<b>PSA10</b>	<b>PSA11</b>	<b>ElderSource</b>
<b>MEDICAL BENEFITS</b>							
Eligibility for health insurance	1 <sup>st</sup> day of month following date of hire; 25+ hours	1 <sup>st</sup> day of month following 60 days; 25+ hours	Date of hire; 30+ hours	1 <sup>st</sup> day of month following 60 days; 28+ hours	90 days; 35+ hours	30+ hours	Date of hire; 25+ hours
<b>High Plan (enter type of plan)</b>	PPO1	HMO1	PPO	HMO1	HMO1	PPO1	HMO Bronze
Percent of employee premiums Paid by Employer	96%	73%	n/a	100%	100%	95%	90%
Percent of full family premiums Paid by Employer	65%	23%	n/a	39%	0%	5%	45%
Deductible – Employee Coverage	\$1500	\$5,000	\$4,000	\$5,000	\$1,500	\$2,000	\$2,500
Deductible – Family Coverage	\$3,000	\$10,000	\$8,000	\$10,000	\$5,000	\$4,000	\$5,000
Co-Pay Primary Care Doctor	\$30	\$40	\$25	\$25	\$40	\$25	\$25
Co-Pay Specialist	\$60	\$65	\$50	\$50	\$85	\$45	\$50
Co-Pay Emergency Room	\$300	\$300	\$300 after deductible	\$0 after deductible	0% after deductible	\$250	\$350
<b>Medium Plan (enter type of plan)</b>	PPO2	HMO2	HMO1	HMO2	PPO1	PPO2	HMO Silver
Percent of employee premiums paid by Employer	90%	70%	n/a	100%	0%	95%	88%
Percent of full family premiums Paid by Employer	64%	22%	n/a	35%	0%	5%	45%
Deductible - Employee Only	\$0	\$1,000	\$1,500	\$5,000	\$1,000	\$1,000	\$1,500
Deductible – Family Coverage	\$0	\$1,500	\$3,000	\$10,000	\$3,000	\$2,000	\$3,000
Co-Pay Primary Care Doctor	\$45	\$30	\$20	\$25	\$25	\$30	\$25
- Co-Pay Specialist	\$100	\$55	\$50	\$50	\$45	\$60	\$45
Co-Pay Emergency Room	\$750	\$250	\$200	\$250	\$300	\$350	10% after deductible

**Summary of 2020 ElderSource Benefits Survey Responses**

<b>Benefit</b>	<b>PSA5</b>	<b>PSA6</b>	<b>PSA8</b>	<b>PSA9</b>	<b>PSA10</b>	<b>PSA11</b>	<b>ElderSource</b>
<b>MEDICAL BENEFITS - Continued</b>							
	Offer Supplemental Medical Gap plan for out of pocket expenses	HMO3	HMO2	HMO3		HMO1	HMO Gold
<b>Low Plan (enter type of plan)</b>							
Percent of employee premiums paid by Employer		65%	n/a	100%		95%	68%
Percent of family premiums paid by Employer		21%	n/a	40%		5%	40%
Deductible - Employee Coverage		\$500	\$2,000	\$4,000		\$2,000	\$1,500
Deductible – Family Coverage		\$1,000	\$4,000	\$8,000		\$4,000	\$3,000
Co-Pay Primary Care Doctor		\$25	\$30	10% co-insurance		\$25	\$25
Co-Pay Specialist		\$45	\$60	10% co-insurance		\$45	\$50
Co-Pay Emergency Room		\$100	\$250	Deductible and co-insurance		\$250	\$350
Do you offer a Health Savings Account (HSA)?	No	No	n/a	Yes	No	No	No
If yes, coverage:				Employee Only: \$6,300			
<b>Opt Out of Medical Coverage Incentive (Yes or No)</b>	No	No	n/a	Yes	No	No	Yes
If yes, how much is paid to employees who opt out of medical coverage?				\$75.01 per month			\$273 per month

<b>Benefit</b>	<b>PSA5</b>	<b>PSA6</b>	<b>PSA8</b>	<b>PSA9</b>	<b>PSA10</b>	<b>PSA11</b>	<b>ElderSource</b>
<b>DENTAL</b>							
Percent of employee premiums paid by Employer	0%	79%	100%	n/a	100%	0%	90%
Percent of family premiums paid by Employer	0%	22%	n/a	n/a	0%	0%	28%
Annual Deductibles	\$50/\$150	\$50/\$150	\$25/\$75	\$50/\$150	\$50/\$150	\$50/\$150 (co-pays for DHMO)	\$50/\$150
PPO (Yes or No)	Yes	Yes	Yes	Yes	Yes	Yes	Yes
DHMO (Yes or No)	Yes	No	Yes	Yes	No	Yes	No
Orthodontia coverage?	Yes, \$2,800 adult; \$2,500 child	Yes, \$1,500 lifetime max	Yes, \$1,250 lifetime max (children only)	Yes, \$1,000 lifetime max (child and adult)	No	Yes	No
<b>Vision (Yes or No)</b>	Yes, employee paid	Yes	Yes, employee paid	Yes, employee paid	Yes, employee paid	Yes, employee paid	Yes, employee paid
Percent of employee premiums paid by Employer	0%	100%	0%	0%	0%	0%	0%
Percent of family premiums paid by Employer	0%	37%	0%	0%	0%	0%	0%
<b>Short Term Disability (Yes or No)</b>	No	No	Yes, employee paid	No	Yes, employer paid	Yes, employer paid	No
Waiting Period			15 days		0 days for accident; 8 days for illness	14 days	
Percentage of dollar amount of monthly benefit			60%		60%	60%	

**Summary of 2020 ElderSource Benefits Survey Responses**

<b>Benefit</b>	<b>PSA5</b>	<b>PSA6</b>	<b>PSA8</b>	<b>PSA9</b>	<b>PSA10</b>	<b>PSA11</b>	<b>ElderSource</b>
<b>Long Term Disability (Yes or No)</b>	Yes, employee paid	Yes, employer paid	Yes, employer paid	Yes, employer paid	No	No	No
Waiting Period	90 days	90 days	90 days	90 days			
Percentage or dollar amount of monthly benefit	60%	60%	66%	60%			
<b>Life Insurance/AD&amp;D (Yes or No)</b>							
	Yes	Yes	Yes	Yes	Yes	Yes	Yes
If yes, amount employer pays	\$25,000, \$50,000, \$100,000 (depending on class level)	2X annual salary	\$30,000	\$50,000, 1X salary, 2X salary (depending on class level)	\$30,000	1X annual salary up to \$175,000	\$50,000
Can additional Life Insurance be purchased by employee?	Yes	Yes	Yes	Yes	Yes	Yes	Yes
If yes, what levels?	Employee, Spouse, Child(ren)	Employee, Spouse, Child(ren)	Employee, Spouse, Child(ren)	Employee, Spouse, Child(ren)	Employee, Spouse	Employee, Spouse, Child(ren)	Employee, Spouse, Child(ren)
<b>Voluntary Benefits</b>							
Dental (Yes or No)	Yes	No		Yes	Yes	Yes	No
Vision (Yes or No)	Yes	No		Yes	Yes	Yes	No
Hospital Plan (Yes or No)	Yes	No		Yes	Yes	Yes	Yes
Short Term Disability (Yes or No)	Yes	No		Yes	Yes	No	Yes
Long Term Disability (Yes or No)	Yes	No		Yes	No	No	No
Cancer Insurance (Yes or No)	Yes	No		Yes	Yes	Yes	Yes
Accident Insurance (Yes or No)	Yes	Yes		Yes	Yes	Yes	Yes
Critical Illness (Yes or No)	Yes	Yes		Yes	Yes	Yes	Yes
Pre-Paid Legal (Yes or No)	No	No		Yes	No	Yes	No

Financial Counseling (Yes or No)	No	No		No	No	No	No
Identity Theft (Yes or No)	No	No		Yes	No	Yes	No
Other - Please specify						Pet Insurance	

**Summary of 2020 ElderSource Benefits Survey Responses**

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<b>401(k)/Retirement Benefits</b>							
Do you offer a 401(k) or similar retirement plan to employees? (Yes or No)	Yes	Yes		Yes	Yes	Yes	Yes
Do you match employee contributions? If yes, what percent is the employer match?	No	Up to 4%		Dollar for dollar up to 3%; .50 on the dollar for next 2%	No	No	No
How soon do employer contributions begin?	1 <sup>st</sup> day of quarter after 6 months of employment	After 1 year		Date of hire	After 1 year	n/a	After 1 year and age 21
Do you make an annual profit sharing contribution? (This type of payment is made to employees, whether they contribute to the 401(k) or not.)	Yes	Yes		No	Yes	Yes (bi-weekly)	Yes
If you make an annual profit sharing contribution, is it guaranteed or discretionary (optional)?	Guaranteed	Discretionary			Guaranteed	Guaranteed	Guaranteed
What is the percentage or amount of the annual profit sharing contribution? (Indicate if it varies from year to year.)	10% of salary	3% (same for past 5 years)			6% after 1 year, 7% after years, 8% after 10 years, 9% after 15 years, 10% after 20 years, 11% after 25 years	Fixed 8% of bi-weekly pay	10% of salary
What is the vesting schedule for any employer contributions?	5 years	Graduated 6 year vesting: 2 years-20%; 3 years-40%; 4 years-60%; 5 years-80%; 6 years-100%		4 years	3 years	1 year	6 years