

**HR EXTENSION ADDITIONAL DISCOUNTS:**

HR Extension clients have the opportunity to receive an additional discount on the monthly fee when they purchase group health benefits through our Benefits Division. HRD Advisory Group’s Benefits division is a Gallagher company.



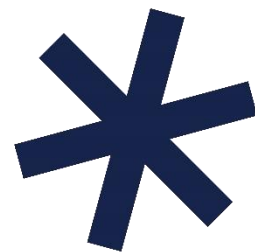
**Gallagher**

HR Extension discounts are determined based on the number of plan participants on the group health benefit plan. The discount is applied to the monthly fee.

Participant Range	Discount
30 – 49 participants	3%
50 – 99 participants	5%
100+ participants	8%

When an HR Extension client signs with our Gallagher Benefits division, HRD will waive two months HR Extension fees.

Our team will help you craft a benefits and compensation plan that’s tailored for you—one that balances your unique offering with your financial realities. Together we’ll build a program that brings the right talent to your door and keeps them engaged once they’re hired.

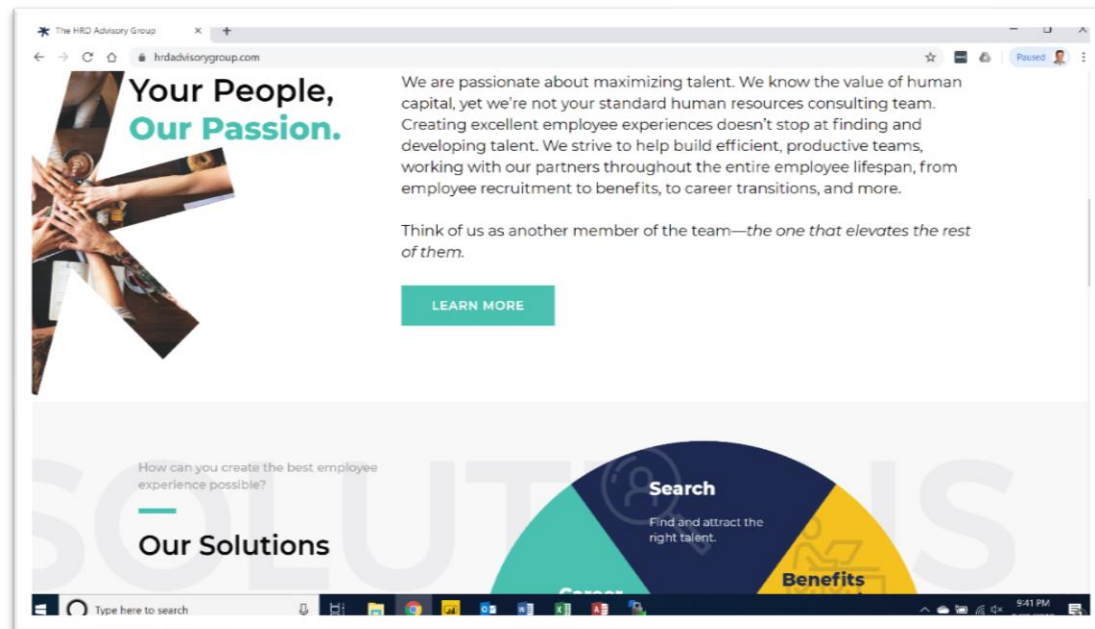


To learn more about HRD Advisory Group, check out their website at:

<https://hrdadvisorygroup.com/>

For questions about HR Extension or other HRD services contact:

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 317-396-5001  
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HR EXTENSION



Whether you are a business owner, HR professional, or have been put in charge of handing HR, HR Extension is designed to come along side you and your team to provide support and expertise in developing, growing, enhancing, or assisting with your organizations human resources and human captial goals.

Through a core set of resources and an a la carte of service options the program can be adapted to fit your needs. HRD is a partner in the organization that provides strategic and technical consultation based on your organizations culture, risk tolerance, and human capital goals.



**Access to Human Resource and Talent Management experts for less than the cost of hiring a part-time HR Assistant**

Designed specifically for CFSA members, this bundled service approach gives you and the leaders in your company access to HR and Talent Management professionals from HRD Advisory Group who have over 120 years of collective experience - all for less than the cost of a part-time HR professional. Our focus is on improving business operations through employee development, engagement, and retention. Additionally the program provides access to resources such as benchmarking, talent development, an online learning management system, and HR resource libraries.

**CFSA MEMBER PRICING**

CORE SERVICE FEES	MONTHLY FEE
<ul style="list-style-type: none"> <li>Strategic HR Consultation &amp; Research</li> <li>Online Learning Management System (Online Training)</li> <li>HR Core Practices &amp; Compliance Assessment</li> <li>Online HR resource library</li> <li>Claims Hotline</li> <li>Job Fit / Selection Assessments</li> </ul>	<b>\$850</b>

Services automatically renew annually. A La Carte service options can be selected and added to the monthly fee.

## CORE SERVICES

As the name suggests, core services are essential to the program and are included in all packages offered.

### Strategic HR Consultation & Research

Company leaders, HR staff members, and designated managers will have access to a designated experienced HR professional to seek guidance or research on critical employee issues, policy and procedure interpretation, compliance requirements, and employment best practices.

### Claims Hotline

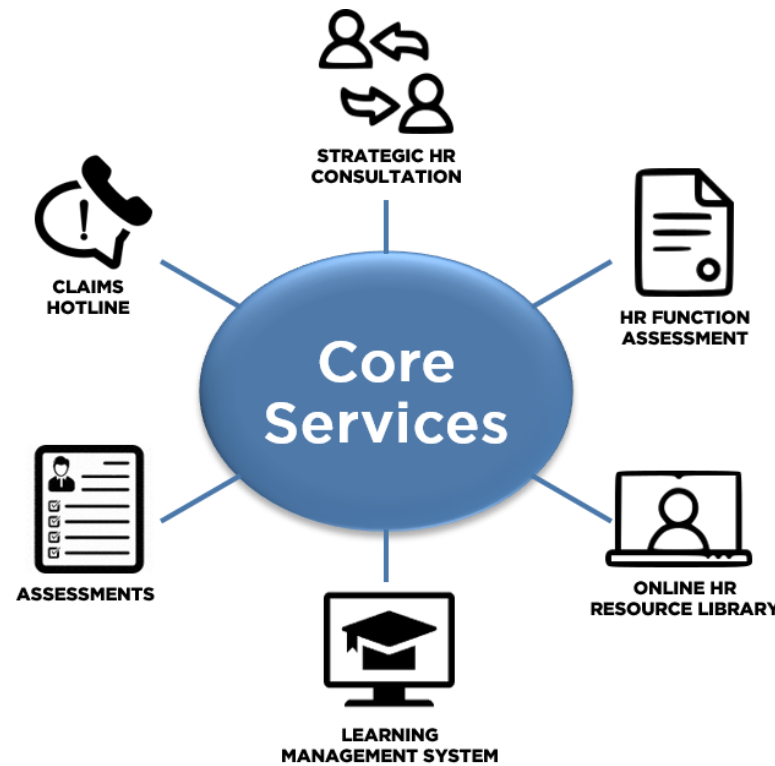
The company will be provided a dedicated phone number and email address that employees can use to report harassment, discriminatory or other employment related claims. HRD will work with a designated representative providing guidance on investigating.

### Selection Assessments

A unique selection assessment that fills the gap between the resume and the interview, PXT Select™ helps organizations. Having the right people in the right jobs is truly powerful. PXT Select™ not only helps you find the right people, but also helps you shape the overall employee experience.

### HR Function “Current State” Assessment

An evaluation of the essential HR functions and employment compliance status based on the company size, state domiciled and industry. Specific areas we review include company policies and procedures, recruitment and hiring, employee benefits and general HR systems.



### Secure Portal & Resource Library

If you have a quick question or want to access analysis tools, forms, or templates; HRD provides designated managers access to a customized secure portal specifically dedicated to your company.

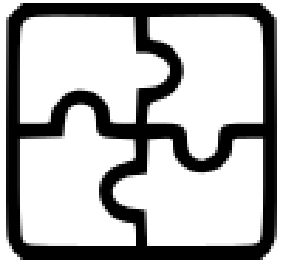
### Online Learning Management System

Access to an online Learning Management System (LMS) that delivers high quality, in-demand courses developed by attorneys and HR experts.

Employers can assign training courses based on role in the company – Employees, Managers, or HR. Each training course includes video, quizzes, and written content. You can even add your own training. Courses are up-to-date and are constantly adding new. Courses include (not limited to) OSHA related training, compliance and harassment, and leadership development.

## A LA CARTE SERVICE OPTIONS:

In addition to the core services; the A La Carte Services list includes services, products, and resources that members can select to best fit their current needs. The products or services selected can be utilized to help organizations and department leaders consolidate their resources, or to regain some time by having HRD help knockout specific projects. Options selected from A La Carte have an additional cost that can be paid upfront or rolled into the core service package monthly fee. HRD will provide quotes per requested service or resource.



Additional Services to Select Based on Your Needs

## A LA CARTE SERVICES INCLUDE:

- Step One Survey II Assessment
- Checkpoint 360 Assessment
- DiSC Workplace Assessment
- PXT Select Assessments
- Salary/Compensation Market Analysis
- Exit/Stay Interview Surveys
- Training Needs Assessment
- Employee Handbook Review & Update
- Discrimination/Harassment On-site Training
- Job Analysis & Description Development
- Career Transition / Outplacement Services
- Performance Management Process Development
- Leader Assimilation
- Everything DiSC Training Session
- Manager Essentials Training
- HRIS/HCM RFP Process & Consultation
- Executive Coaching / Leadership Coaching
- Executive/Director/Manager Search

The options you choose will be completed, delivered, or distributed within a twelve-month period. HRD will provide service quotes for A La Carte Options. A La Carte options can be purchased stand-alone or rolled into the HR Extension Core Services Package.

Short descriptions for A La Carte Services included on the insert.

## A LA CARTE SERVICES



## SERVICE PACKAGE SELECTION MEMBER PRICING AGREEMENT

MEMBER PRICING – HR Extension Core Services	<u>MONTHLY FEE</u>	<u>Select</u>
<b>HR Extension Core Service Package</b>	<b>\$850</b>	<input type="checkbox"/>

NON MEMBER PRICING – HR Extension Core Services	<u>MONTHLY FEE</u>	<u>Select</u>
<b>HR Extension Core Service Package</b>	<b>\$1500</b>	<input type="checkbox"/>

Select any additional A La Carte services you want and if you want to “roll” the fee into the Core Service Package monthly fee.

A LA CARTE SERVICES LIST	<u>Select</u>	<u>Roll-In</u>
*Step One Survey II Assessment	<input type="checkbox"/>	<input type="checkbox"/>
*Checkpoint 360 Assessment	<input type="checkbox"/>	<input type="checkbox"/>
*DiSC Workplace Assessment	<input type="checkbox"/>	<input type="checkbox"/>
*PXT Select Assessments	<input type="checkbox"/>	<input type="checkbox"/>
*Salary Market Benchmark Review	<input type="checkbox"/>	<input type="checkbox"/>
*Exit/Stay Interview Surveys	<input type="checkbox"/>	<input type="checkbox"/>
*Training Needs Assessment	<input type="checkbox"/>	<input type="checkbox"/>
*Employee Handbook Review & Update	<input type="checkbox"/>	<input type="checkbox"/>
*Discrimination/Harassment Training	<input type="checkbox"/>	<input type="checkbox"/>
*Job Analysis & Description Development	<input type="checkbox"/>	<input type="checkbox"/>
*Career Transition/Outplacement Services	<input type="checkbox"/>	<input type="checkbox"/>
*Performance Management Process Development	<input type="checkbox"/>	<input type="checkbox"/>
*Leader Assimilation	<input type="checkbox"/>	<input type="checkbox"/>
*Everything DiSC Training Session	<input type="checkbox"/>	<input type="checkbox"/>
*Manager Essentials Training	<input type="checkbox"/>	<input type="checkbox"/>
*HRIS/HCM RFP Process & Consultation	<input type="checkbox"/>	<input type="checkbox"/>
*Executive Coaching / Leadership Coaching	<input type="checkbox"/>	<input type="checkbox"/>
Executive/Director/Manager Search	<input type="checkbox"/>	<input type="checkbox"/>

**Client Signature**
**Date**

**Jacop Lucas, HRD Advisory Group**

- Initial payment for the first month of service is invoiced at signing. The term and first month of service begins on the first day of the month. Billing will occur monthly, invoiced on the last Monday of the month prior to the month of service. Payment is due upon receipt of the invoice.
- Services included under Core Services and A La Carte Service Options are individually priced based on specified limits, materials, and assumed hours then spread over a twelve-month term. Increased work, hours, limits, materials etc. to these services will increase the monthly service fee.
- A written notification (letter or email) is required by the client or HRD, prior to termination of the agreement. The notification period required is 90 days prior to termination. Services and monthly payments will end on the last day of the month of the last day of the required notice period (based on the date posted if mailed or date received if emailed). The client will also be charged a the full (pro-rated) amount for all completed services selected from the A La Carte Services if rolled into the month fee and not already paid in full.
- The full agreement includes the Service Package Selection and Member Pricing Agreement, the HR Extension Overview, A La Carte Service proposal, and any exhibit, addendum, or amendment added to the agreement.

## A LA CARTE SERVICE – SHORT DESCRIPTIONS:

### 1. **ZyWave Learning (LMS) - Online Training Courses**

#### **HR Training for Every Employee**

ZyWave Learning is the most economical Learning Management System (LMS) available today delivering high quality, in-demand courses developed by experts and attorneys.

### 2. **Salary Market Benchmark Review**

HRD will analyze the salary for a total of five positions against the market including benchmarks relevant to geographic location, company size, and industry.

### 3. **Exit/Stay Interview Surveys**

HRD Advisory Group (HRD) will conduct exit surveys for employees who leave employment during the term. HRD will conduct surveys for employees reaching their 90-day work anniversaries during the term. At the end of the term, HRD will provide a combined summary of the surveys along with recommendations.

### 4. **Training Needs Assessment Scope of Service and Expectations**

HRD will conduct an online survey of the company's employee base or a specified department/team to determine what training would benefit the company to invest.

### 5. **Employee Handbook Review & Update**

HRD has a very comprehensive evaluation process that identifies policy alignment, redundancy, utilization, and effectiveness in addition to clarity, readability, flow, compliance, and distribution. HRD will evaluate and update policies in your employee handbook.

### 6. **Discrimination/Harassment Investigation Training**

HRD will evaluate the current investigation process for conducting harassment or sexual harassment claims. If a formalized program does not exist, HRD will help develop a process and train designated managers how to implement the plan.

### 7. **Job Analysis & Description Development**

HRD will evaluate five current jobs and descriptions and update the job descriptions to be compliant with EEOC and ADA requirements, as well as align the essential functions to the position.

### 8. **Outplacement Service**

Your Career Advancement Program consists of private career consultation and career development workshops for one month, which will assist in the transition to a new position – one that is right for you and matches both your skills and interests.

### 9. **Performance Management Assessment**

HRD will evaluate your existing Performance Management Process including; Review organizational documents & survey results, facilitate 4, 1 hour focus groups, synthesize findings and research/benchmarking recent trends, and summarize findings and recommendations.

### 10. **DiSC Training**

HRD Advisory Group proposes the facilitation of Everything DiSC for twenty employees, as well as individual coaching for three employees. The coaching will focus on enhancing strengths and improving behaviors that currently limit successful communication between supervisors and their direct reports.

### 11. **HR Technology Evaluation & Request for Proposal Process**

HRD will evaluate your existing HRIS/HCMS/Payroll system. This evaluation will validate the utilization of the system, identify areas of critical error and unclean data, then provide recommendations on how to better utilize the system or suggest other systems that might better meet your organization's needs. HRD will also conduct an RFP process for the organization to evaluate new systems and service providers.

### 12. **Executive Coaching**

Executive Coaching describes a formal leadership development process in which an expert coach works one-on-one with an organizational leader. The coaching process unfolds in a series of dynamic, confidential sessions designed to help leaders establish and achieve clear goals that result in improved managerial effectiveness, greater leader impact, and enhanced organizational performance.

*Descriptions provided on this page are short summaries of the service provide. Specific details and scopes of service are included in a separate appendix and made available upon request. Contact, Jacop Lucas at 317-396-5001 or [jacop@hrdadvisors.com](mailto:jacop@hrdadvisors.com) for more details.*