



Human Resources Committee Meeting

December 4, 2023 at 5:00 p.m.

Fresno EOC Board Room

1920 Mariposa Street, Suite 310

Fresno, CA, 93721

Join By Zoom:

https://fresnoeoc.zoom.us/meeting/register/tZ0uc-qtrTwtGtXSIO2wGl3K4u2hRLV_qxEW



HUMAN RESOURCES COMMITTEE MEETING AGENDA

DECEMBER 4, 2023 AT 5:00PM

1. CALL TO ORDER

2. ROLL CALL

A. Monthly Attendance Record 3

3. APPROVAL OF SEPTEMBER 11, 2023, MINUTES Approve

A. September 11, 2023 Human Resources Meeting Minutes 4

4. HUMAN RESOURCES QUARTERLY SUMMARY REPORT Information

A. Human Resources Quarterly Summary Report 8

5. PERSONNEL POLICIES AND PROCEDURES MANUAL REVISIONS Approve

A. Personnel Policies and Procedures Manual Revisions 41

6. COST OF LIVING ADJUSTMENT Approve

A. Cost of Living Adjustment 43

7. EMPLOYER 401(A) PENSION PLAN Approve

A. Employer 401(a) Pension Plan 44

8. COMPENSATION STUDY Approve

A. Compensation Study 46

9. OTHER BUSINESS

10. PUBLIC COMMENTS

(This portion of the meeting is reserved for persons wishing to address the Committee on items within jurisdiction but not on the agenda. Comments are limited to three minutes).

11. ADJOURNMENT

Human Resources Committee Meeting Monthly Attendance Record 2023

Barigye McCoy
Sherry Neil
Jimi Rodgers
Alysia Bonner
Earl Brown

Jan.	9-Feb	6-Mar	April	May	5-Jun	July	Aug. 25	11-Sep	Oct.	Nov.	4-Dec	Attended
	Cancelled	O			Cancelled No Quorum		O	T				3/4
		O					X	X				1/4
		T					O	O				3/4
		O					T	O				3/4
		X					O	O				2/4

O-Present X-Absent T-Teleconference

HUMAN RESOURCES COMMITTEE

September 11, 2023

5:00 PM

MINUTES

1. **CALL TO ORDER**

Committee Member, Jimi Rodgers, called the meeting to order at 5:09 PM.

2. **ROLL CALL**

Roll was called and a quorum was established.

Commissioners Present: Jimi Rodgers, Alysia Bonner, Earl Brown, Linda Hayes and Amy Arambula.

Teleconference: Barigye McCoy

Commissioners Absent: Sherry Neil.

Staff Present: Andy Arredondo, Ian Matthews, Jennifer Tierce, Nelson Dibie, Erica Reyes, Kelsie Chaney, Karina Perez, Emilia Reyes, Lloyd Engleman, Fred Hamaseyah, Ryan Louie, Steve Warnes, and Jay Zapata.

3. **APPROVAL OF AUGUST 25, 2023, MINUTES**

A. August 25, 2023 Human Resources Meeting Minutes

Public Comment: None heard.

Motion by: Bonner **Second By:** Brown

Ayes: All in favor.

Nayes: None heard.

4. **HR METRICS**

A. Employee Data and Demographics -Quarter 3

Nelson Dibie, Human Resources Officer, presented the HR Metrics as requested at the previous meeting. Commissioner Rodgers and Commissioner Bonner commended Dibie for getting the reports that have been requested.

Commissioner Bonner asked if HR can provide bilingual data for staff. Dibie said that information can be provided.

Commissioner Arambula identified a lack of Asian representation amongst demographics in Leadership and Directors level roles.

Public comment: None heard.

No action required.

5. **PERSONNEL POLICIES AND PROCEDURES MANUAL**

Commissioner Rodgers commended the HR Staff for taking feedback and providing an easier-to-read final draft of the Policies and Procedures Manual as requested at the August HR Committee.

Commissioner Brown inquired about Education Leave and indicated that it is unclear if the employee can take 4 months. Erica Reyes, Human Resources Manager, responded that the 4 month time frame is due to aligning with COBRA for health insurance reasons.

Public Comment: None heard.

Motion by: Brown **Second By:** Bonner

Ayes: All in favor.

Nayes: None heard.

6. EMPLOYEE HANDBOOK

Dibie provided an overview of the Employee Handbook for approval.

Commissioner Arambula inquired that the leave information is unclear if the leave is paid or unpaid and that the Jury Duty language may need to be updated to align with how the jury duty process is now functioning. Dibie advised that it will be reviewed and clarified, if needed.

Commissioner Bonner asked what is flex time. HR Manager Reyes noted corrections to be made and clarified what is flex time versus alternative work schedules.

Public Comment: None heard.

Motion by: Brown **Second By:** Bonner

Ayes: All in favor.

Nayes: None heard.

7. HUMAN RESOURCES FORM

Dibie provided an overview the Employee Complaint Form for approval.

Commissioner Hayes asked how staff are going to know if the complaint is confidential. Attorney Paul Bauer introduced himself and clarified steps regarding keeping a complaint as confidential as possible. Bauer also advised that “accused”, as listed on form could change to “respondent and still be appropriate”. Emilia Reyes, Chief Executive Officer added that there should be a process outlined.

Public Comment: None heard.

Motion by: Brown **Second By:** Bonner

Ayes: All in favor.

Nayes: None heard.

8. FIDUCIARY INVESTMENT REPORT

Lloyd Engleman, Senior Managing Partner at Accelerate Retirement, provided an overview of the Fiduciary Investment Report. Engleman stated funds can be assigned a score from 0-10 to representing fund performance. Fund scores from 7-10 is acceptable, 5-6 is on a watchlist, 0-4 score is reviewed for analysis.

Target date funds - 92% of assets are in target date funds. This is the default investment accountment if participants do not select an investment plan.

Overall, Engleman and Fred Hamsayeh, Certified Financial Planner at Pensionmark, are confident with the investment funds.

Commissioner Brown asked how staff make investment decisions if they do not have a financial/investment background. Ryan Louie, Certified Financial Planner at Ford Financial, advised that he has done site visits, comes to Executive Plaza and has meetings/calls in his office. Participants have access to on-site and phone support to speak with investment and financial planning advisors.

Commissioner Rodgers asked how staff are advised of retirement plan enrollment options. HR Manager Reyes advised that retirement plan information is included in New Hire Orientation, announced at Head Start Pre-Service, and site visits are rotated to ensure staff opportunities for all staff to receive retirement plan information and opportunities for meetings with the advisors.

Public Comment: None heard.

Motion by: Brown **Second By:** Bonner

Ayes: All in favor.

Nayes: None heard.

9. **INVESTMENT FUND CHANGE**

Financial Advisors Engleman and Hamsayeh made the recommendation to change a few identified funds based on low performance and to move three funds to watchlist. Reviews are conducted and presented quarterly.

Commissioner Brown asked if the board should review and approve. Engleman advised that the financial advisors currently act in a 321 Co-Fiduciary role. The financial advisors can move to a 338 Advisor role making fiduciary changes and presenting changes to the committee.

Commissioner Rodgers asked if the agency still has employee representatives. Steve Warnes, Assistant Finance Director, advised that we had 2 employee representatives, one no longer here.

Committee members made a recommendation to the bylaws committee to separate the pension committee meeting from the HR committee meeting.

Public Comment: None heard.

Motion by: Brown **Second By:** Bonner

Ayes: All in favor.

Nayes: None heard.

10. **403 (B) AUTO-ENROLLMENT**

VOYA financial studies regarding behavioral finance indicate that employees are more likely to opt out if they do not want to participate versus than opt in if they do want to participate in retirement investment.

4% Auto-Enrollment contributions are recommended for all new hires and current staff during the auto-enrollment launch. Overall recommendation is for employees to contribute 10-15% of income to have a healthy retirement account. The process would involve notifying employees 90 days, 60 days and 30 days. Employees would have the option to opt-out: written, online account or via phone system log in.

Jay Zapata, Chief Financial Officer, advised that Auto-Enrollment was approved by the Board years ago. The economy and other considerations are different now. CEO Reyes indicated that it should be left to employees and asked if a survey could be implemented for staff.

Public comment: None heard.

No action required.

11. **OTHER BUSINESS**

The next meeting is scheduled on Monday, December 4, 2023 at 5:00 p.m.

Commissioner Rodgers commended Human Resources and Equity and Impact departments support of the ArtHop event on 9/4.

No action required.

12. **PUBLIC COMMENT**

Public comment: None heard.

No action required.

13. **ADJOURNMENT**

The Meeting was adjourned at 6:38 p.m.

Respectfully submitted,

Jimi Rodgers
Committee Member



HUMAN RESOURCES COMMITTEE MEETING

Date: December 4, 2023	Program: Human Resources
Agenda Item #: 4	Director: N/A
Subject: Human Resources Quarterly Summary Report	Officer: Nelson Dibie

Background

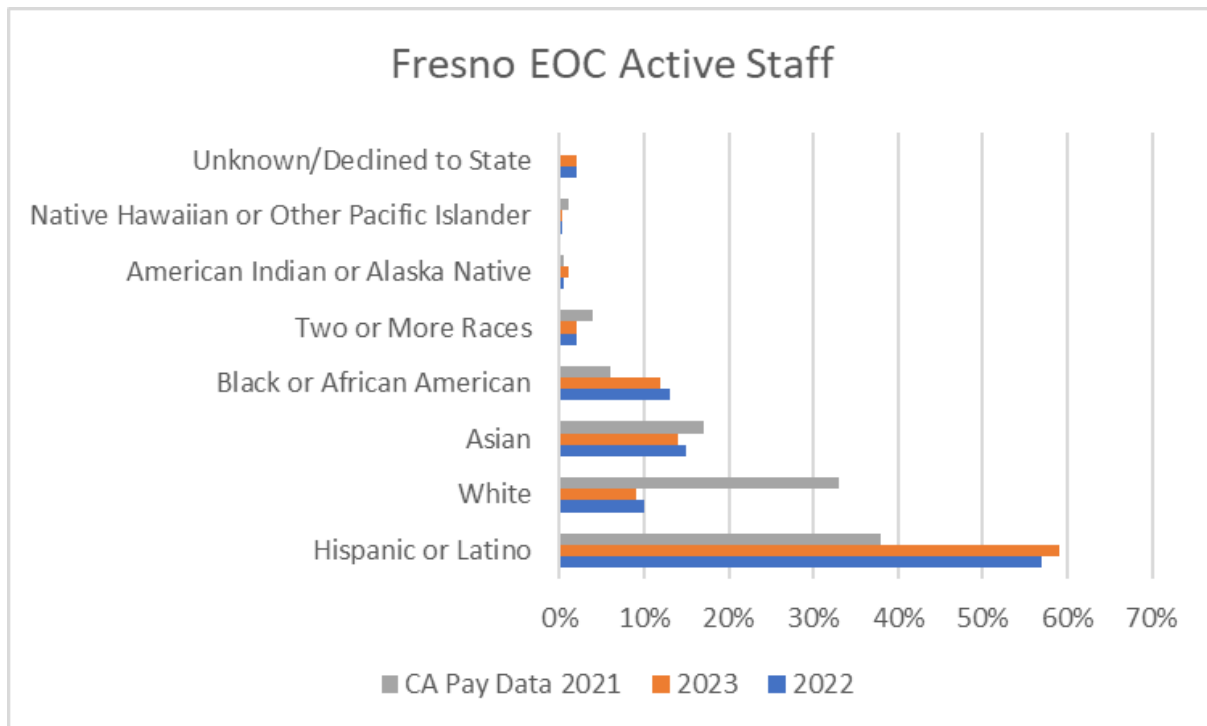
On a quarterly basis, staff provides the Committee with a high-level snapshot of Human Resources activity. The following information is provided in these reports:

- Employee Overview
- Talent Acquisition w/ Demographics
- Separations & Turnover w/ Demographics
- Benefit Enrollment
- Safety & Worker's Compensation
- Fiduciary Investment Review

Fresno EOC Demographics

As of October 31, 2023

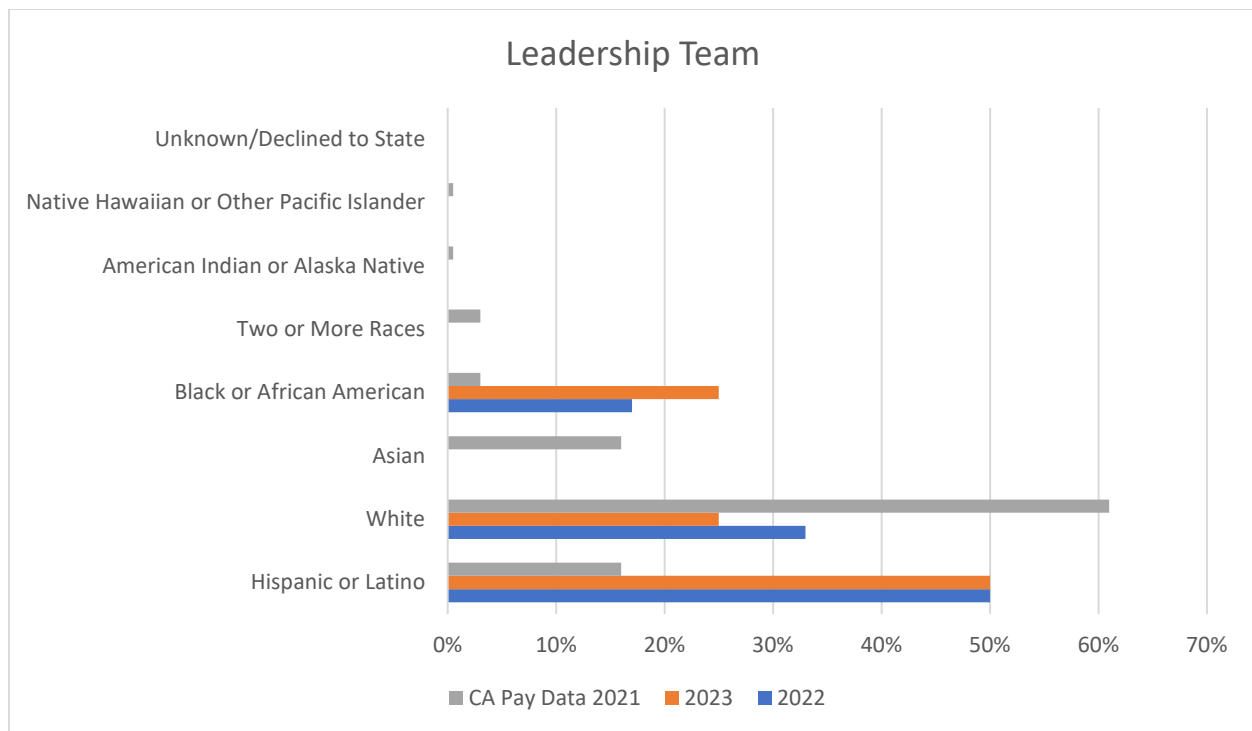
Fresno EOC Active Staff			
Ethnicity	October 31, 2022	October 31, 2023	CA Pay Data 2021
Hispanic or Latino	57%	59%	38%
White	10%	9%	33%
Asian	15%	14%	17%
Black or African American	13%	12%	6%
Two or More Races	2%	2%	4%
American Indian or Alaska Native	0.6%	1%	1%
Native Hawaiian or Other Pacific Islander	0.4%	0.3%	1%
Unknown/Declined to State	2%	2%	0
Total	1030	1086	



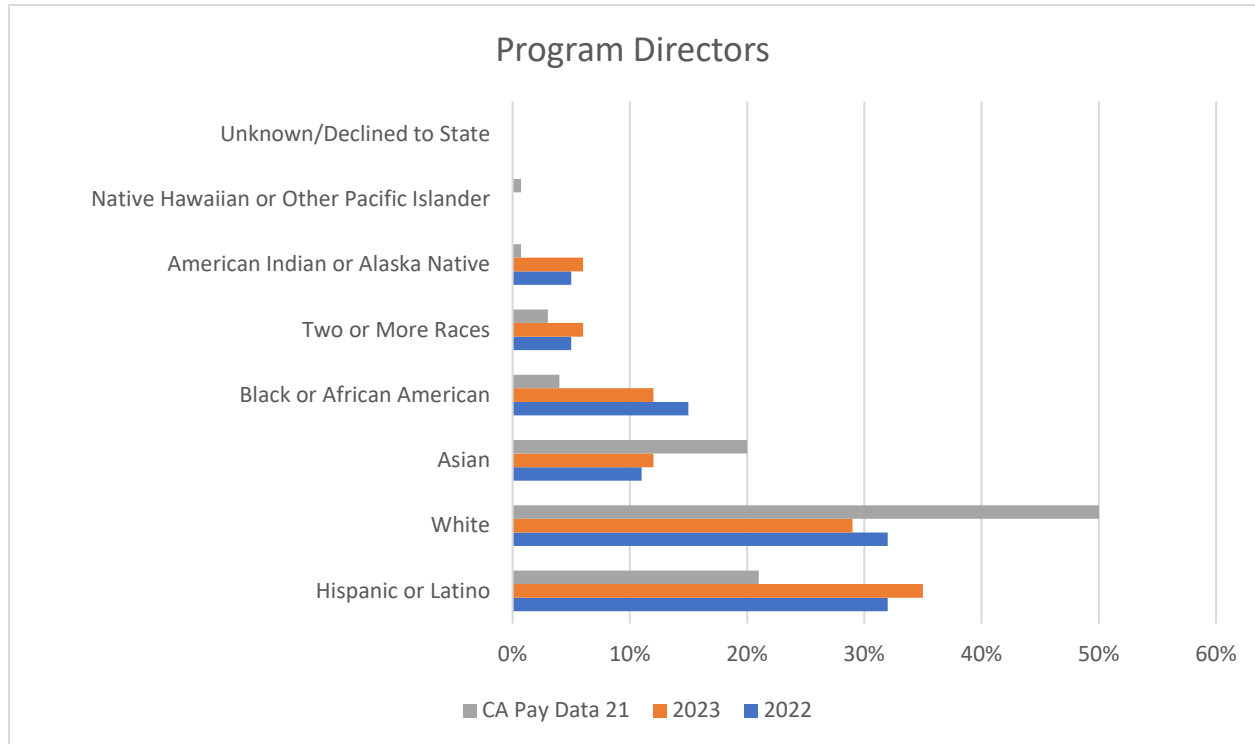
Fresno EOC Leadership Team & Program Director Demographics

As of October 31, 2023

Leadership Team			
Ethnicity	October 31, 2022	October 31, 2023	CA Pay Data 2021
Hispanic or Latino	50%	50%	16%
White	33%	25%	61%
Asian	0	0	16%
Black or African American	17%	25%	3%
Two or More Races	0	0	3%
American Indian or Alaska Native	0	0	1%
Native Hawaiian or Other Pacific Islander	0	0	1%
Unknown/Declined to State	0	0	0



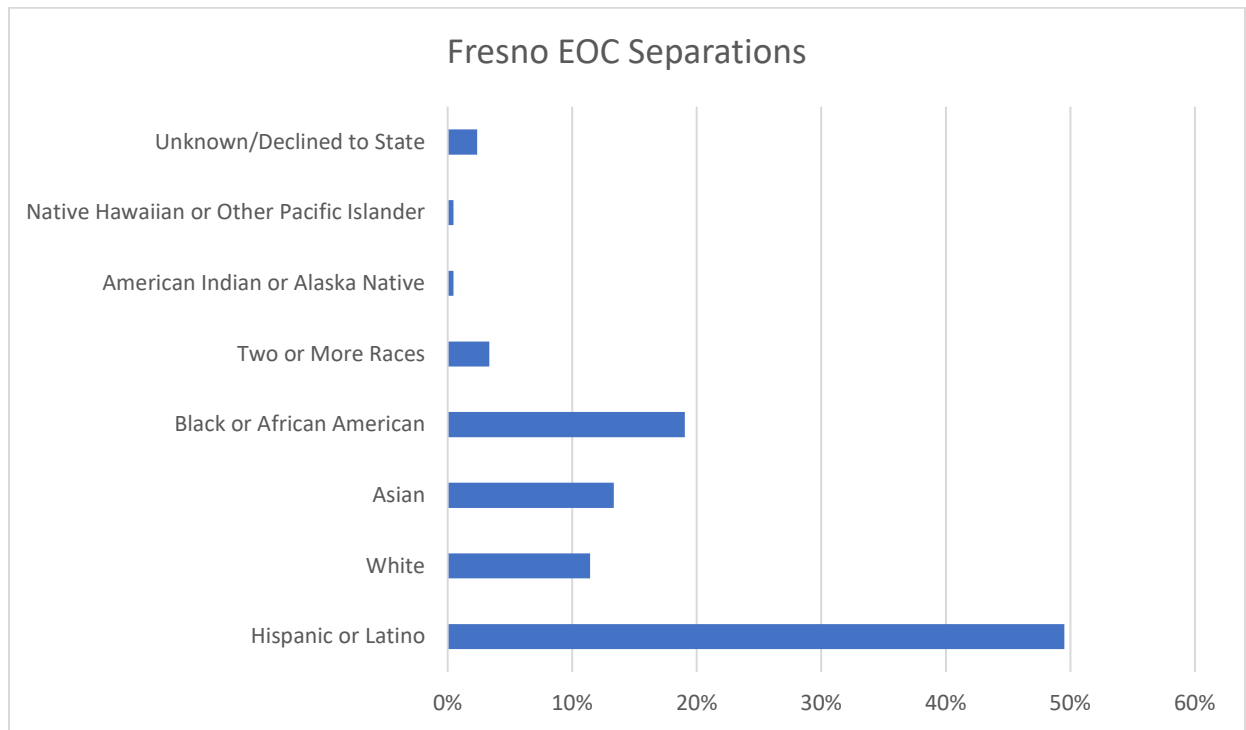
Program Directors			
Ethnicity	October 31, 2022	October 31, 2023	CA Pay Data 2021
Hispanic or Latino	32%	35%	21%
White	32%	29%	50%
Asian	11%	12%	20%
Black or African American	15%	12%	4%
Two or More Races	5%	6%	3%
American Indian or Alaska Native	5%	6%	1%
Native Hawaiian or Other Pacific Islander	0	0	1%
Unknown/Declined to State	0	0	0



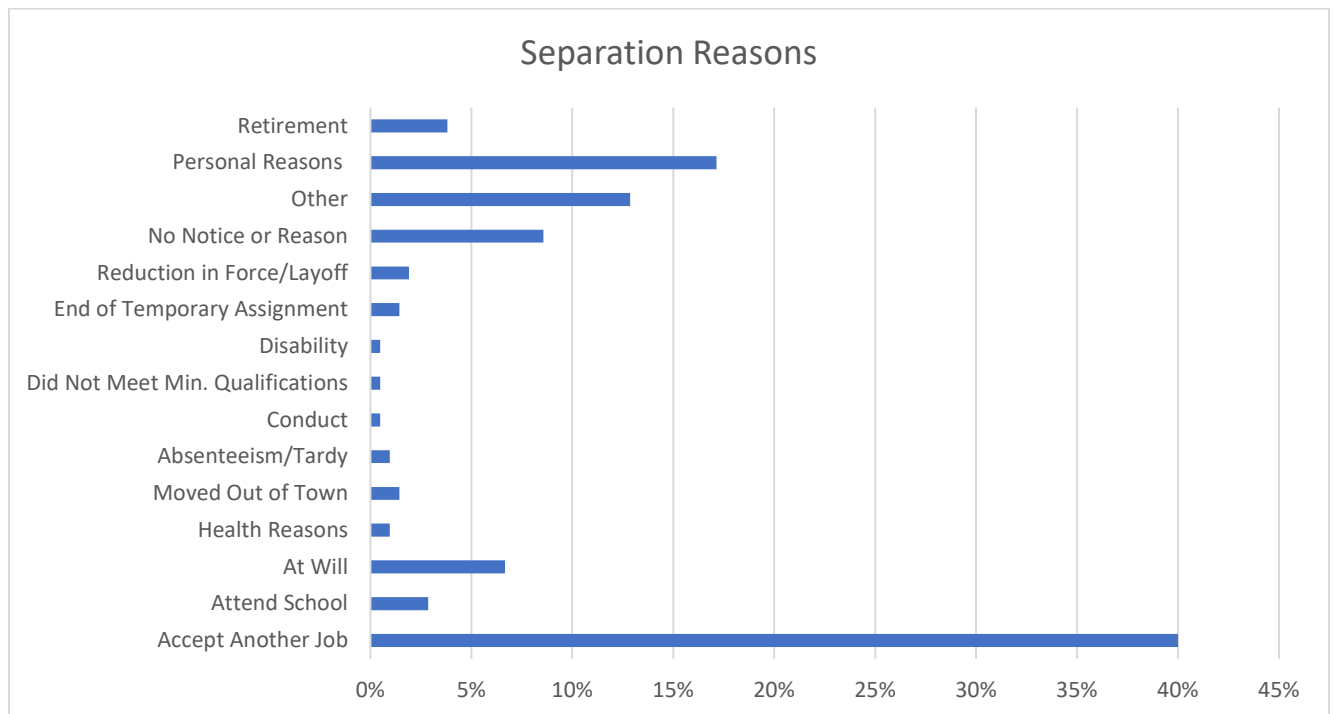
Fresno EOC Separations

January 1, 2023 through October 31, 2023

Fresno EOC Separations		
Ethnicity	# of Separations	Percentage
Hispanic or Latino	104	50%
White	24	11%
Asian	28	13%
Black or African American	40	19%
Two or More Races	7	3%
American Indian or Alaska Native	1	0.5%
Native Hawaiian or Other Pacific Islander	1	0.5%
Unknown/Declined to State	5	2%
Total Separations	210	



Separation Reasons		
Reason	# of Reasons	Percentage
Accept Another Job	84	40%
Attend School	6	3%
At Will	14	7%
Health Reasons	2	1%
Moved Out of Town	3	1%
Absenteeism/Tardy	2	1%
Conduct	1	0.5%
Did Not Meet Min. Qualifications	1	0.5%
Disability	1	0.5%
End of Temporary Assignment	3	1%
Reduction in Force/Layoff	4	2%
No Notice or Reason	18	9%
Other	27	13%
Personal Reasons	36	17%
Retirement	8	4%

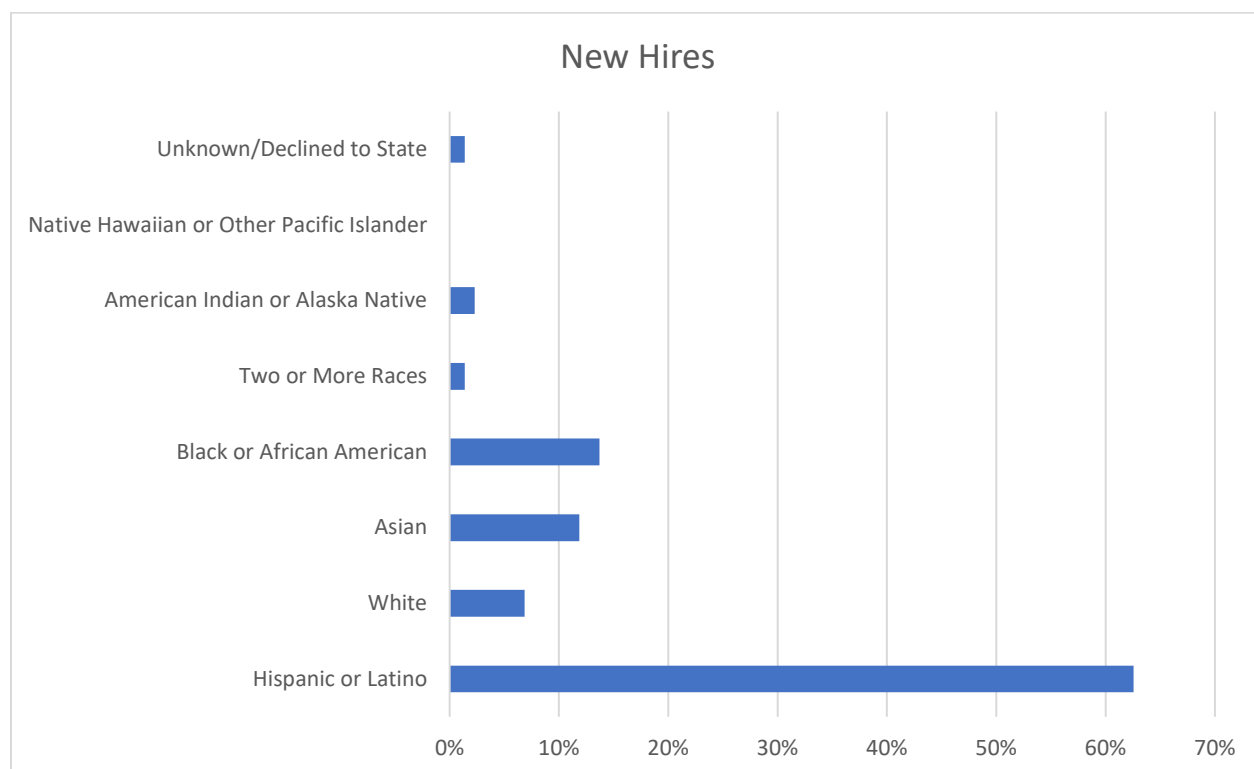


Separations 1/1/22 – 10/31/22	195
Separations 1/1/23 – 10/31/23	210

Fresno EOC New Hires

January 1, 2023 through October 31, 2023

Fresno EOC New Hires		
Ethnicity	# of New Hires	Percentage
Hispanic or Latino	137	63%
White	15	7%
Asian	26	12%
Black or African American	30	14%
Two or More Races	3	1%
American Indian or Alaska Native	5	2%
Native Hawaiian or Other Pacific Islander	0	0%
Unknown/Declined to State	3	1%
Total	219	



New Hires 1/1/22 – 10/31/22	117
New Hires 1/1/23 – 10/31/23	219

Fresno EOC Performance Evaluation Report

As of October 31, 2023

Program/Department	Past Due Evaluations	Total Employees	Percentage of Past Due Evaluations
Advance Peace	1	9	11%
Communications Department	2	6	33%
Community Learning Center	1	2	50%
Energy Services Division	29	62	47%
Equity & Impact Department	1	5	20%
Executive Office	9	15	60%
Facilities Department	0	5	0%
Finance Department	19	28	68%
Food Services	20	117	17%
Head Start 0 to 5	154	482	32%
Health Services Division	4	42	10%
Human Resources Department	0	14	0%
Information Technology Department	0	12	0%
Planning and Development Department	0	1	0%
Sanctuary & Support Services	0	45	0%
School of Unlimited Learning	4	24	17%
Stop the Violence	6	7	86%
Training & Employment Services Division	23	54	43%
Transit Systems	3	82	4%
Women, Infants & Children	5	74	7%
Total	281	1086	26%

Benefit Enrollment

Employee Enrollment Counts										
	PPO					HDHP				
	EE	ES	EC	EF	Total	EE	ES	EC	EF	Total
July 2022	249	93	101	149	592	81	11	8	18	118
August 2022	241	90	98	148	577	78	11	8	19	116
September 2022	240	88	99	149	576	81	11	7	19	118

Employee Enrollment Counts										
	PPO					HDHP				
	EE	ES	EC	EF	Total	EE	ES	EC	EF	Total
July 2023	248	86	92	134	560	86	13	7	19	125
August 2023	249	86	93	134	562	87	13	7	19	126
September 2023	256	85	91	136	568	90	13	7	19	129

Abbreviations

PPO	Preferred Plan Option
HDHP	High Deductible Health Plan
EE	Employee
ES	Employee Spouse
EC	Employee Children
EF	Employee Family

Fresno Economic Opportunities Commission

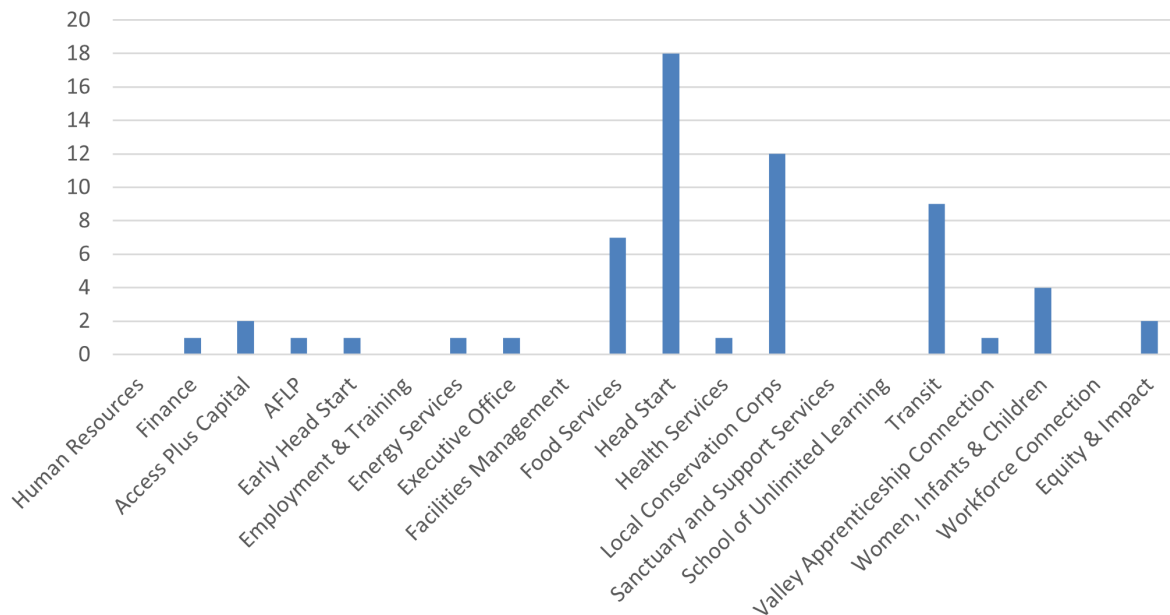
Workers Compensation Analysis

2023 Quarterly Report

Trending Data: By Program

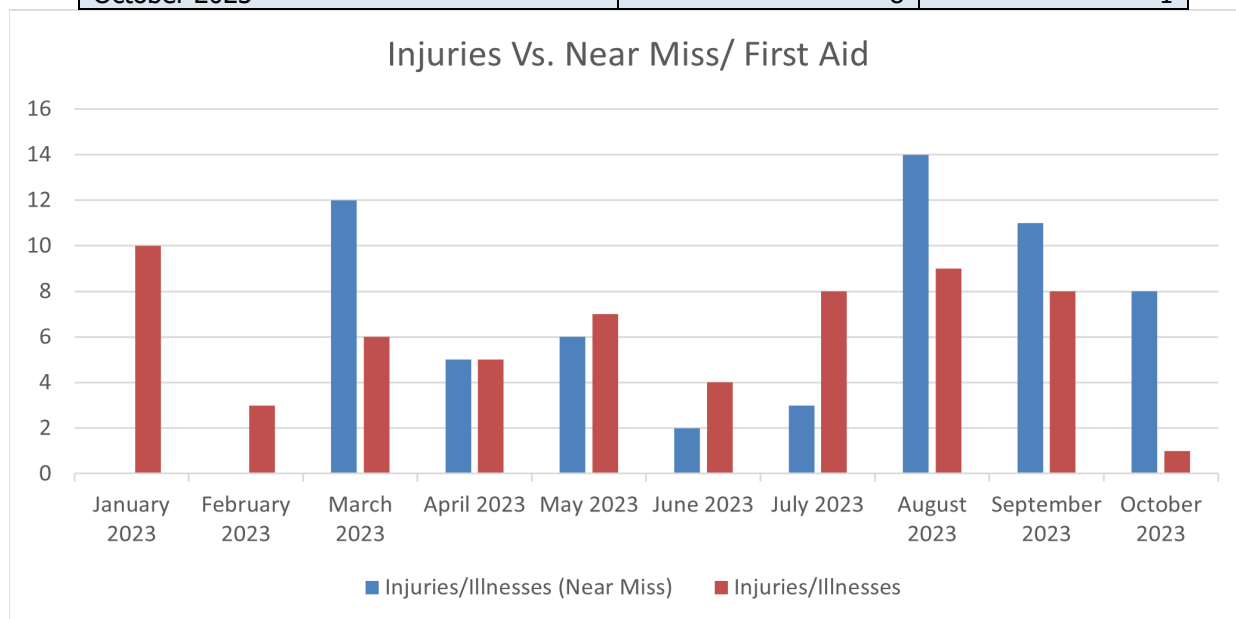
Departments	Injuries/Illnesses
Finance	1
Access Plus Capital	2
AFLP	1
Early Head Start	1
Employment & Training	0
Energy Services	1
Executive Office	1
Food Services	7
Head Start	18
Health Services	1
Local Conservation Corps	12
Sanctuary and Support Services	0
School of Unlimited Learning	0
Transit	9
Valley Apprenticeship Connection	1
Women, Infants & Children	4
Human Resources	0
Facilities Management	0
Workforce Connection	0
Equity & Impact	2

Trending Data: HR Comittee Report Injuries/Illnesses



Injuries by Month Vs. Near Miss

Month	Injuries/Illnesses (Near Miss)	Incidents: Injuries/Illnesses
January 2023	0	10
February 2023	0	3
March 2023	12	6
April 2023	5	5
May 2023	6	7
June 2023	2	4
July 2023	3	8
August 2023	14	9
September 2023	11	8
October 2023	8	1



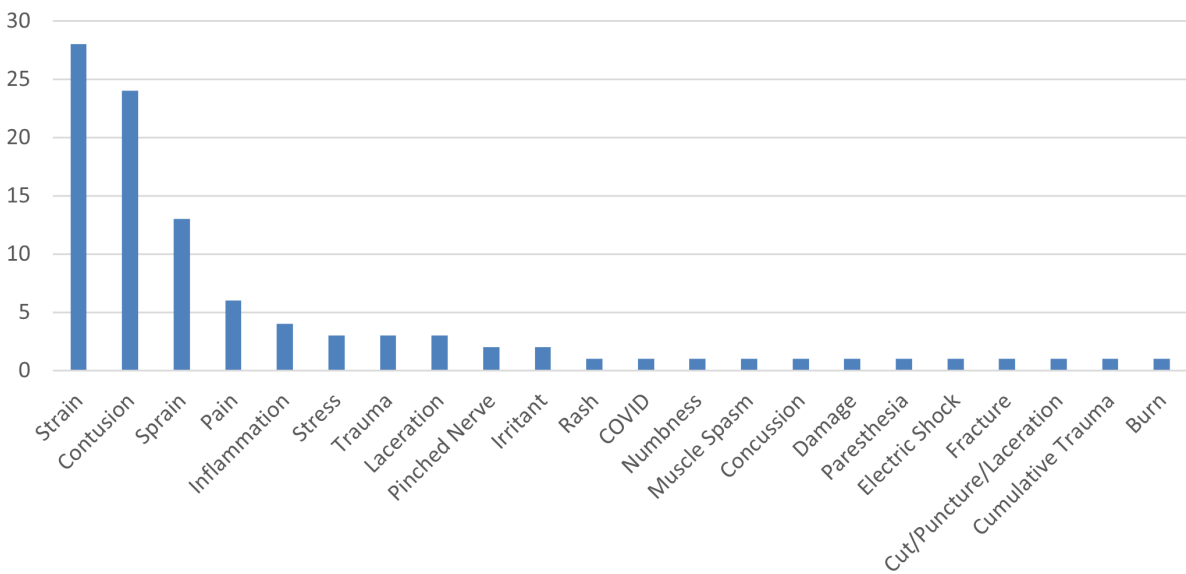
Near miss: Incident that did not result in a reportable claim, injury, illness, or damage but had the potential to do so.

Nature of Injury YTD

Trending Data: Nature of Injury

Injury Nature	Occurrences
Strain	28
Contusion	24
Sprain	13
Pain	6
Inflammation	4
Trauma	3
Pinched Nerve	2
Laceration	3
Damage	1
Paresthesia	1
Rash	1
Cut/Puncture/Laceration	1
Fracture	1
Stress	3
Irritant	2
COVID	1
Numbness	1
Muscle Spasm	1
Concussion	1
Electric Shock	1
Cumulative Trauma	1
Burn	1

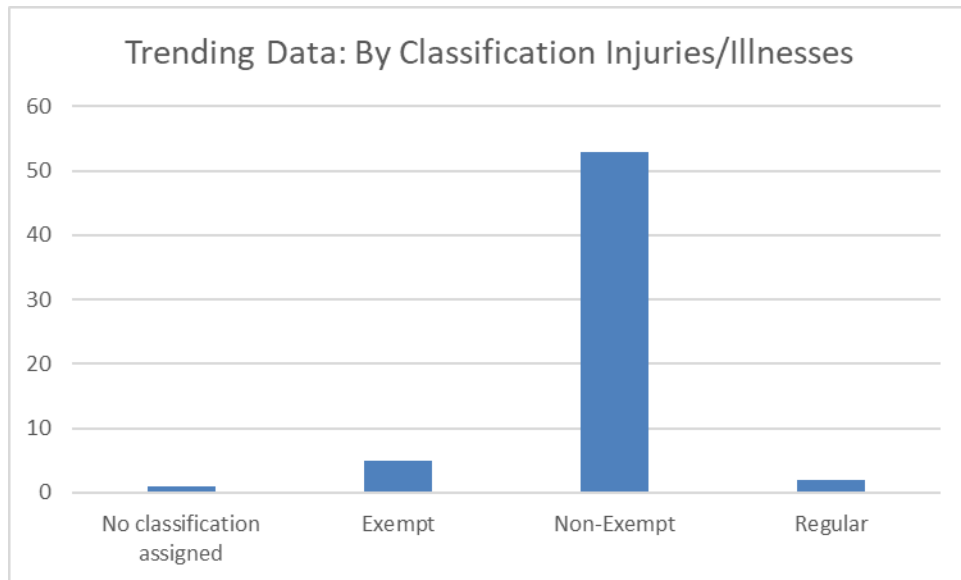
Trending Data: Nature of Injury Occurrences



Most injury occurrences are a direct result of a strain, while fracture claims filed continue to remain low.

Claims Based on Employee Job Classification

Trending Data: By Classification	
Classifications	Injuries/ Illnesses
No classification assigned	1
Exempt	5
Non-Exempt	53
Regular	2





Fiduciary Investment Review™

Prepared for:

Fresno County Economic Opportunities
Commission

Prepared by:



CONFIDENTIAL

Fiduciary Investment Review™



Prepared for:

Fresno County Economic Opportunities Commission

Prepared by:



Presented by:

Lloyd Engleman
Managing Director

Accelerate Retirement- Lloyd Engleman

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Corona, CA 92883

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Fiduciary Fitness Program™

Module 8: Maintaining Your Fiduciary File

Why is it important to maintain an organized file?

- It is a fiduciary best practice;
- Makes it easy to locate pertinent plan information;
- Ensures plan documentation is accounted for;
- Helps with the termination or addition of plan fiduciaries; and
- Saves time, resources and money during Internal Revenue Service (IRS) or Department of Labor (DOL) audits.

Regulatory Audits

- Regulatory audits require plan sponsors to submit pertinent, detailed plan information for review
- Examples of what is reviewed include:
 - Plan documents, trust agreements
 - Investment policy statement and related investment decision documentation
 - Names of all fiduciaries, trustees, consultants, plan administrators and parties in interest
 - Complete plan correspondence file

Module 8: Maintaining Your Fiduciary File

Plan-Focused Documents

- Plan documents and amendments (signed and dated)
- Trust agreement
- Summary plan description and any material modifications
- 404(c) policy statement and notice
- Form 5500 “Annual Return/Report of Employee Benefit Plan” and audited financial statements (if applicable)
- Form 8955-SSA “Annual Registration Statement Identifying Separated Participants With Deferred Vested Benefits”
- Determination letter applications (Form 5300) (if necessary)
- Plan loan documents
- Summary annual reports
- IRS opinion or determination letters
- Fidelity bond

Plan-Focused Documents

- Any fiduciary documents related to the plan, board of directors, committees and fiduciary functions
 - Corporate board resolutions
 - Fiduciary roles and responsibilities, including signed acceptances
 - Committee charter
 - Investment policy statement
 - Meeting minutes
 - Fiduciary liability insurance policies and/or riders

Module 8: Maintaining Your Fiduciary File

Provider-Focused Documents

- All documents relating to consultants, service providers and auditors, including:
 - Service provider contracts
 - Advisory, consulting or engagement agreements
 - RFP/provider analysis reports
 - ADV II and Schedule F (if required)
 - 408(b)(2) fee disclosures

Administrative Documents

- The following are some examples of administrative documents recommended to be readily available:
 - Evidence of employer contributions (bank statements, trust statements)
 - Distribution documents
 - Audit results (IRS, DOL)
 - Complaints, claims and appeals documentation

Participant Communications

- Section 404a-5 Participant Fee Disclosure
- QDIA notices
- Safe harbor notice
- Automatic enrollment notices (ACA, EACA, QACA)
- Enrollment materials
- Event communications (meetings, emails, postings, etc.)
- Requests from participants

Module 8: Maintaining Your Fiduciary File

Investment Selection and Monitoring

- Maintain pertinent investment materials associated with plan management:
 - Documentation of investment activity (trust statements)
 - Meeting minutes
 - Investment lineup and expenses
 - Investment policy statement
 - Copies of Fiduciary Investment Review books, including Scorecards

Fiduciary Briefcase™ (Sponsor Portal)

- What is it?
 - Online client filing system
 - Plan sponsors have their own unique login to the website in which the consultant will upload any pertinent documentation for the plan
 - Login information printed on each Executive Summary
- Benefits:
 - Creates, maintains and organizes client retirement file
 - Gives plan fiduciaries complete access to documents at the click of a button



ACTION STEP

- **Complete Documentation Module “Organizing Your Fiduciary File”**
- **Confirm Fiduciary Briefcase log-in credentials**

ACR#4376824 02/22

Scorecard System Methodology

The Scorecard System Methodology incorporates both quantitative and qualitative factors in evaluating fund managers and their investment strategies. The Scorecard System is built around pass/fail criteria, on a scale of 0 to 10 (with 10 being the best) and has the ability to measure active, passive and asset allocation investing strategies. Active and asset allocation strategies are evaluated over a five-year time period, and passive strategies are evaluated over a three-year time period.

Eighty percent of the fund's score is quantitative (made up of eight unique factors), incorporating modern portfolio theory statistics, quadratic optimization analysis, and peer group rankings (among a few of the quantitative factors). The other 20 percent of the score is qualitative, taking into account things such as manager tenure, the fund's expense ratio relative to the average fund expense ratio in that asset class category, and the fund's strength of statistics (statistical significance). Other criteria that may be considered in the qualitative score includes the viability of the firm managing the assets, management or personnel issues at the firm, and/or whether there has been a change in direction of the fund's stated investment strategy. The following pages detail the specific factors for each type of investing strategies.

Combined, these factors are a way of measuring the relative performance, characteristics, behavior and overall appropriateness of a fund for inclusion into a plan as an investment option. General fund guidelines are shown in the "Scorecard Point System" table below. The Scorecard Point System is meant to be used in conjunction with our sample Investment Policy Statement, in order to help identify what strategies need to be discussed as a "watchlist" or review candidate; what strategies continue to meet some minimum standards and continue to be appropriate; and/or identify new top-ranked strategies for inclusion into a plan.

<i>Scorecard Point System</i>	
Acceptable:	7-10 Points
Watchlist¹:	5-6 Points
Review²:	0-4 Points

¹ Funds that receive a watchlist score four consecutive quarters or five of the last eight quarters should be placed under review status.

² Review status necessitates documenting why the fund/strategy remains appropriate or documenting the course of action for removal as an investment option.

Scorecard™

Total Plan Assets: \$32,970,780.94 as of 9/30/2023

Target Date Series

Asset Allocation	Assets	Asset Class	Risk Index	Allocation Score (Series Funds)		Selection Score (Underlying Funds)		Blended Score			
				# of Funds	Avg Score	# of Funds	Avg Score	Q3 2023	Q2 2023	Q1 2023	Q4 2022
PIMCO RealPath Blend Target Date Series Instl	\$29,122,547.35	MA	68	10	9.3	12	8.6	9	9	9	9

Selection (Underlying Funds)

Asset Allocation	Asset Class	Ticker/ ID	Style			Risk/Return			Peer Group		Qual	Score			
			Risk Level	Style Diversity	R ²	Risk/ Return	Up/ Down	Info Ratio	Return Rank	SR Rank	2pt Max/ Expense	Q3 2023	Q2 2023	Q1 2023	Q4 2022
PIMCO Income Instl	MSB	PIMIX	1	0	1	1	1	1	1	1	2	9	9	9	9
			6.2	48.1/ 51.9	92.2	6.2/ 2.4	108.7/ 94.7	0.56	22	18	- 0.62	MSB	MSB	MSB	MSB

Active	Asset Class	Ticker/ ID	Style			Risk/Return			Peer Group		Qual	Score			
			Style	Style Drift	R ²	Risk/ Return	Up/ Down	Info Ratio	Return Rank	Info Ratio Rank	2pt Max/ Expense	Q3 2023	Q2 2023	Q1 2023	Q4 2022
PIMCO Total Return Instl	CFI	PTTRX	1	1	1	1	1	1	1	1	2	10	10	7	9
			-18.7/ 31.9	13.6	96.3	5.7/ 0.2	101.2/ 99.4	0.12	35	22	- 0.49	CFI	CFI	CFI	CFI
PIMCO Long-Term Real Return Instl	UGT	PRAIX	0	0	1	0	0	0	0	1	2	4	4	5	5
			-62.9/ 33.9	43.7	88.0	15.1/ -0.8	205.8/ 252.3	-0.3	99	43	- 1.48	UGT	UGT	UGT	UGT
PIMCO Real Return Instl	UGT	PRRIX	1	1	1	1	1	1	1	1	2	10	8	7	9
			-89.6/ 89.0	1.8	98.2	6.2/ 2.2	102.1/ 101.8	0.06	16	9	- 0.67	UGT	UGT	UGT	UGT

Scorecard™

continued

Active	Asset Class	Ticker/ ID	Style			Risk/Return			Peer Group		Qual	Score			
			Style	Style Drift	R ²	Risk/ Return	Up/ Down	Info Ratio	Return Rank	Info Ratio Rank		Q3 2023	Q2 2023	Q1 2023	Q4 2022
PIMCO High Yield Instl	HY	PHIYX	1	1	1	1	0	0	1	0	2	7	7	7	8
			92.3/ -95.7	6.8	98.3	8.9/ 2.5	94.8/ 98.4	-0.36	49	57	- 0.57	HY	HY	HY	HY
PIMCO International Bond (USD-Hdg) Instl	GFI	PFORX	1	1	0	1	1	1	1	1	2	9	9	9	9
			-50.9/ 4.8	7.9	64.4	4.3/ 1.0	53.9/ 37.3	0.6	8	10	- 0.63	GFI	GFI	GFI	GFI
PIMCO Emerging Mkts Lcl Ccy and Bd Instl	SFI	PELBX										-	-	-	-
											-	-	-	-	-
PIMCO Long-Term US Government Instl	LOG	PGOVX	1	1	1	1	0	0	1	1	2	8	7	6	6
			100.0/ 81.4	16.0	99.5	14.3/ -2.8	99.3/ 99.6	-0.02	33	30	- 1.05	LOG	LOG	LOG	LOG

Passive	Asset Class	Ticker/ ID	Style				Peer Group				Qual	Score			
			Style	Style Drift	R ²	Tracking Error	TE Rank	Expense Rank	Return Rank	SR Rank		Q3 2023	Q2 2023	Q1 2023	Q4 2022
Vanguard Institutional Index I	LCB-P	VINIX	1	1	1	1	1	1	1	1	2	10	10	10	10
			1.0/ 99.5	1.2	99.7	1.1	35.0	11.0	11	10	- 0.04	LCB-P	LCB-P	LCB-P	LCB-P
Vanguard Small Cap Index I	SCB-P	VSCIX	1	0	1	0	1	1	1	1	2	8	8	8	8
			-24.8/ -52.3	8.5	97.0	4.0	64.0	9.0	27	28	- 0.04	SCB-P	SCB-P	SCB-P	SCB-P
Vanguard Developed Markets Index Instl	ILCB-P	VTMNX	1	1	1	1	1	1	1	1	2	10	10	9	9
			8.5/ 96.0	5.1	98.4	2.5	50.0	15.0	31	33	- 0.05	ILCB-P	ILCB-P	ILCB-P	ILCB-P
Vanguard Emerging Mkts Stock Idx Instl	EME-P	VEMIX	1	1	1	1	1	1	1	1	2	10	10	10	10
			-5.6/ -93.7	13.3	97.7	2.9	71.0	10.0	19	19	- 0.10	EME-P	EME-P	EME-P	EME-P

Scorecard™

Risk-based Series

Asset Allocation	Assets	Asset Class	Risk Index	Allocation Score (Series Funds)		Selection Score (Underlying Funds)		Blended Score			
				# of Funds	Avg Score	# of Funds	Avg Score	Q3 2023	Q2 2023	Q1 2023	Q4 2022
T. Rowe Price Personal Risk-Based Series	\$1,847.57	N/A	N/A	3	6.3	7	7.2	7	7	7	7

Selection (Underlying Funds)

Asset Allocation	Asset Class	Ticker/ ID	Style			Risk/Return			Peer Group		Qual	Score			
			Risk Level	Style Diversity	R ²	Risk/ Return	Up/ Down	Info Ratio	Return Rank	SR Rank	2pt Max/ Expense	Q3 2023	Q2 2023	Q1 2023	Q4 2022
T. Rowe Price Dynamic Global Bond I	MSB	RPEIX	1	0	0	1	0	1	1	1	1	6	6	6	5
			4.6	100.0/ 0.0	0.0	4.6/ 1.9	130.5/ 12,028.7	0.05	15	10	S 0.53	MSB	MSB	MSB	MSB

Active	Asset Class	Ticker/ ID	Style			Risk/Return			Peer Group		Qual	Score			
			Style	Style Drift	R ²	Risk/ Return	Up/ Down	Info Ratio	Return Rank	Info Ratio Rank	2pt Max/ Expense	Q3 2023	Q2 2023	Q1 2023	Q4 2022
T. Rowe Price Instl Emerging Mkts Eq	EME	IEMFX	1	1	1	0	0	0	0	0	1	4	4	4	4
			24.7/ -96.0	18.5	95.4	20.5/ -1.6	99.4/ 107.0	-0.48	86	93	T 1.00	EME	EME	EME	EME
T. Rowe Price Instl High Yield	HY	TRHYX	1	1	1	0	0	0	1	1	2	7	7	7	7
			100.0/ -100.0	0.0	99.1	9.5/ 2.9	99.0/ 99.2	-0.04	37	40	- 0.50	HY	HY	HY	HY
T. Rowe Price Instl Floating Rate	BL	RPIFX	1	1	1	1	1	0	1	1	2	9	9	9	9
			-71.7/ -88.2	10.2	97.2	6.5/ 4.2	91.2/ 87.6	-0.1	11	11	- 0.57	BL	BL	BL	BL

Scorecard™

continued

Active	Asset Class	Ticker/ ID	Style			Risk/Return			Peer Group		Qual	Score			
			Style	Style Drift	R ²	Risk/ Return	Up/ Down	Info Ratio	Return Rank	Info Ratio Rank	2pt Max/ Expense	Q3 2023	Q2 2023	Q1 2023	Q4 2022
T. Rowe Price Intl Bd (USD Hdgd) I	GFI	TNBMX	1	1	0	1	1	1	1	1	2	9	9	9	9
			-53.4/ 3.5	14.1	69.6	5.2/ 1.0	67.9/ 48.5	0.69	14	12	- 0.53	GFI	GFI	GFI	GFI
T. Rowe Price Instl Emerging Mkts Bond	SFI	TREBX										-	-	-	-
												-	-	-	-

Passive	Asset Class	Ticker/ ID	Style				Peer Group				Qual	Score			
			Style	Style Drift	R ²	Tracking Error	TE Rank	Expense Rank	Return Rank	SR Rank	2pt Max/ Expense	Q3 2023	Q2 2023	Q1 2023	Q4 2022
T. Rowe Price US Trs Long-Term Idx I	LOG-P	PRUUX	1	0	1	1	0	1	1	1	2	8	8	9	9
			100.0/ 49.8	25.2	99.6	0.8	78.0	60.0	55	69	- 0.10	LOG-P	LOG-P	LOG-P	LOG-P

Risk-based Series

Asset Allocation	Assets	Asset Class	Risk Index	Allocation Score (Series Funds)		Selection Score (Underlying Funds)		Blended Score			
				# of Funds	Avg Score	# of Funds	Avg Score	Q3 2023	Q2 2023	Q1 2023	Q4 2022
Vanguard LifeStrategy Risk-Based Series Inv	\$1,371.46	N/A	N/A	4	4.5	4	9.0	7	7	7	7

Selection (Underlying Funds)

Passive	Asset Class	Ticker/ ID	Style				Peer Group				Qual	Score			
			Style	Style Drift	R ²	Tracking Error	TE Rank	Expense Rank	Return Rank	SR Rank	2pt Max/ Expense	Q3 2023	Q2 2023	Q1 2023	Q4 2022
Vanguard Total Stock Mkt Idx Inv	LCB-P	VTSMX	1	1	1	1	1	1	1	1	2	10	10	10	10
			3.1/ 85.8	2.1	99.8	0.8	15.0	23.0	61	65	- 0.14	LCB-P	LCB-P	LCB-P	LCB-P

Scorecard™

continued

Passive	Asset Class	Ticker/ ID	Style				Peer Group				Qual	Score			
			Style	Style Drift	R ²	Tracking Error	TE Rank	Expense Rank	Return Rank	SR Rank	2pt Max/ Expense	Q3 2023	Q2 2023	Q1 2023	Q4 2022
Vanguard Total Intl Stock Index Inv	IE-P	VGTSX	1	1	1	1	1	1	1	1	2	10	10	10	10
			12.2/ 46.2	7.5	99.0	1.8	14.0	40.0	27	24	- 0.17	IE-P	IE-P	IE-P	IE-P
			1	1	1	1	1	1	1	1	2	10	10	10	10
Vanguard Total Bond Market II Idx Inv	CFI-P	VTBIX	1	1	1	1	1	1	1	1	2	10	10	10	10
			8.9/ 57.6	4.1	99.8	0.3	60.0	26.0	22	27	- 0.09	CFI-P	CFI-P	CFI-P	CFI-P
			1	0	0	0	0	1	1	1	2	6	6	6	6
Vanguard Total Intl Bd Idx Investor	GFI-P	VTIBX	1	0	0	0	0	1	1	1	2	6	6	6	6
			-63.8/ 18.6	10.3	64.1	4.8	82.0	33.0	37	37	- 0.13	GFI-P	GFI-P	GFI-P	GFI-P
			1	0	0	0	0	1	1	1	2	6	6	6	6

Core Lineup

Asset Allocation	Assets	Asset Class	Ticker/ ID	Style			Risk/Return			Peer Group		Qual	Score			
				Risk Level	Style Diversity	R ²	Risk/ Return	Up/ Down	Info Ratio	Return Rank	SR Rank		Q3 2023	Q2 2023	Q1 2023	Q4 2022
American Funds American Balanced R6	\$156,397.68	MOD	RLBGX	1	0	1	1	1	1	1	1	2	9	9	9	9
				11.8	59.3/ 40.7	97.0	11.8/ 5.8	102.9/ 99.9	0.27	11	8	- 0.25	MOD	MOD	MOD	MOD
				1	0	1	1	1	1	1	1	2	9	9	9	9
PIMCO Income Instl	\$118,512.26	MSB	PIMIX	1	0	1	1	1	1	1	1	2	9	9	9	9
				6.2	48.1/ 51.9	92.2	6.2/ 2.4	108.7/ 94.7	0.56	22	18	- 0.62	MSB	MSB	MSB	MSB
				1	0	1	1	1	1	1	1	2	9	9	9	9

Scorecard™

Fund Change took place on 11/7/2023

Active	Assets	Asset Class	Ticker/ ID	Style			Risk/Return			Peer Group		Qual	Score			
				Style	Style Drift	R ²	Risk/ Return	Up/ Down	Info Ratio	Return Rank	Info Ratio Rank	2pt Max/ Expense	Q3 2023	Q2 2023	Q1 2023	Q4 2022
Vanguard Equity-Income Adm	\$192,491.02	LCV	VEIRX	1	1	1	1	1	1	1	1	1	9	9	9	9
				-89.6/ 89.9	4.0	97.4	17.3/ 7.8	93.9/ 88.5	0.44	33	30	T 0.19	LCV	LCV	LCV	LCV
JPMorgan Mid Cap Growth R6	\$118,560.24	MCG	JMGMX	1	1	1	1	1	1	1	1	2	10	10	10	10
				94.6/ -11.9	5.3	98.0	21.9/ 8.8	101.9/ 96.2	0.58	9	3	- 0.70	MCG	MCG	MCG	MCG
Calvert Small-Cap I	\$284.01	SCB	CSVIX	0	1	1	1	1	1	0	0	2	7	8	8	8
				-30.4/ -30.2	23.7	90.6	20.4/ 4.0	83.5/ 82.2	0.2	57	60	- 0.94	SCB	SCB	SCB	SCB
PIMCO StocksPLUS Small Institutional	\$29,893.03	SCB	PSCSX	1	1	1	0	0	0	0	0	2	5	5	5	7
				-5.6/ -99.9	3.9	99.5	26.5/ 1.1	105.7/ 107.6	-0.46	85	91	- 0.75	SCB	SCB	SCB	SCB
TRP Integrated US Small-Cap Gr Eq	\$87,680.14	SCG	PRDSX	0	1	1	1	1	1	1	1	2	9	7	7	7
				41.3/ -24.0	9.0	93.5	21.6/ 4.3	87.4/ 82.8	0.4	49	50	- 0.80	SCG	SCG	SCG	SCG
American Beacon International Eq R5	\$136,785.22	ILCV	AAIEX	1	1	1	0	0	0	0	1	2	6	9	9	6
				-72.3/ 86.3	18.2	95.5	21.5/ 2.5	108.0/ 109.9	-0.17	53	42	- 0.72	ILCV	ILCV	ILCV	ILCV
Goldman Sachs Intl Sm Cp Insights Instl	\$17,321.91	ISMB	GICIX	1	1	1	1	1	1	0	0	2	8	5	5	5
				-1.0/ -70.4	22.4	95.8	19.9/ 1.0	99.6/ 99.5	0.02	59	58	- 0.87	ISMB	ISMB	ISMB	ISMB
American Funds New World R6	\$117,418.46	EME	RNWGX	0	1	1	1	1	1	1	1	2	9	8	9	9
				42.0/ 18.0	18.6	83.8	18.2/ 5.3	99.0/ 82.8	0.61	8	10	- 0.57	EME	EME	EME	EME
American Funds New Perspective R6	\$233,700.33	GE	RNPGX	1	1	1	1	1	1	1	1	2	10	10	10	10
				55.8/ 59.4	22.5	96.2	19.9/ 8.4	111.8/ 104.5	0.46	9	8	- 0.41	GE	GE	GE	GE

- StocksPLUS strategies underperformed their respective benchmarks in October as long exposure to U.S. interest rates detracted from performance.
- Outlook: We believe that StocksPLUS strategies are well positioned to deliver on their objectives over the medium term given the renewed opportunity set across fixed income sectors, the current levels of yield within the bond portfolio, and the moderate environment for cost of equity replication.
- The StocksPLUS funds continue to be ranked competitively vs their Morningstar peers: All funds are ranked in the top 15% of their peer group since inception.

Scorecard™

continued

Active	Assets	Asset Class	Ticker/ ID	Style			Risk/Return			Peer Group		Qual	Score			
				Style	Style Drift	R ²	Risk/ Return	Up/ Down	Info Ratio	Return Rank	Info Ratio Rank		Q3 2023	Q2 2023	Q1 2023	Q4 2022
Impax Global Environmental Markets Instl	\$53,847.45	GE	PGINX	1	1	1	0	1	0	1	1	2	8	10	10	10
				52.2/ 30.1	21.2	90.3	21.4/ 6.3	114.4/ 114.3	-0.03	26	27	- 0.91	GE	GE	GE	GE
Fidelity Total Bond Fund	\$424,956.49	CFI	FTBFX	1	1	1	1	1	1	1	1	2	10	10	10	10
				-21.9/ 25.7	8.0	88.7	5.8/ 1.0	108.8/ 95.9	0.47	11	9	- 0.45	CFI	CFI	CFI	CFI
Eaton Vance High Income Opportunities I	\$277.05	HY	EIHIX	1	1	1	1	1	1	1	1	2	10	10	10	10
				96.9/ -90.7	7.4	97.5	9.4/ 3.7	98.8/ 91.3	0.5	5	3	- 0.66	HY	HY	HY	HY
PIMCO International Bond (USD-Hdg) Instl	\$43,723.64	GFI	PFORX	1	1	0	1	1	1	1	1	2	9	9	9	9
				-50.9/ 4.8	7.9	64.4	4.3/ 1.0	53.9/ 37.3	0.6	8	10	- 0.63	GFI	GFI	GFI	GFI
The Standard Stable Asset Fund II	\$535,921.15	SV	SSAFII.Stan										-	-	-	-
													-	-	-	-
													-	-	-	-
State Street Instl US Govt MMkt Premier	\$165.84	MM	GVMXX										-	-	-	-
													-	-	-	-
												0.12	-	-	-	-

Passive	Assets	Asset Class	Ticker/ ID	Style				Peer Group				Qual	Score			
				Style	Style Drift	R ²	Tracking Error	TE Rank	Expense Rank	Return Rank	SR Rank		Q3 2023	Q2 2023	Q1 2023	Q4 2022
Vanguard 500 Index Admiral	\$736,800.02	LCB-P	VFIAX	1	1	1	1	1	1	1	1	2	10	10	10	10
				1.0/ 99.5	1.2	99.7	1.1	28.0	12.0	12	12	- 0.04	LCB-P	LCB-P	LCB-P	LCB-P

Scorecard™

continued

Passive	Assets	Asset Class	Ticker/ ID	Style				Peer Group				Qual	Score			
				Style	Style Drift	R ²	Tracking Error	TE Rank	Expense Rank	Return Rank	SR Rank		Q3 2023	Q2 2023	Q1 2023	Q4 2022
Calvert US Large Cap Core Rspnb Idx I	\$16,846.33	LCB-P	CISIX	1	1	1	1	0	1	0	0	2	7	8	9	9
				21.9/ 86.9	2.1	99.4	1.5	81.0	34.0	89	90	- 0.24	LCB-P	LCB-P	LCB-P	LCB-P
Vanguard Growth Index Admiral	\$70,255.80	LCG-P	VIGAX	1	1	1	1	1	1	1	1	2	10	10	10	10
				100.0/ 99.9	0.4	99.3	2.2	59.0	10.0	60	65	- 0.05	LCG-P	LCG-P	LCG-P	LCG-P
Vanguard Mid-Cap Value Index Admiral	\$116,544.95	MCV-P	VMVAX	1	0	1	1	1	1	1	1	2	9	9	9	9
				-99.4/ 17.3	9.4	98.7	2.3	44.0	2.0	52	59	- 0.07	MCV-P	MCV-P	MCV-P	MCV-P
Vanguard Small Cap Value Index Admiral	\$139,337.61	SCV-P	VSIAX	1	0	1	0	1	1	1	1	2	8	9	9	9
				-99.7/ -53.2	8.0	96.8	4.3	59.0	8.0	13	18	- 0.07	SCV-P	SCV-P	SCV-P	SCV-P
iShares Russell Small/Mid-Cap Idx K	\$109,849.58	SMCB-P	BSMKX	1	1	1	1	1	1	1	1	2	10	10	10	10
				-22.7/ -56.0	4.5	100.0	0.1	19.0	55.0	22	21	- 0.08	SMCB-P	SMCB-P	SMCB-P	SMCB-P
Vanguard Total Intl Stock Index Admiral	\$387,444.35	IE-P	VTIAX	1	1	1	1	1	1	1	1	2	10	10	10	10
				12.5/ 46.7	7.4	99.0	1.9	49.0	29.0	20	22	- 0.11	IE-P	IE-P	IE-P	IE-P
Vanguard FTSE All-Wld ex-US SmCp Idx Adm	\$17,321.91	ISMB-P	VFSAX	1	1	1	1	1	1	1	1	2	10	10	9	8
				19.4/ -31.9	13.4	97.2	3.2	50.0	40.0	40	40	- 0.16	ISMB-P	ISMB-P	ISMB-P	ISMB-P

Disclosure

* Strategy Equivalent Score


The CIT exclusively available to RPAG utilizes the same manager and strategy as the Scored fund equivalent, which is highlighted and shown below the CIT option. The Scored fund equivalent generally has a higher fee and is shown for CIT investment due diligence purposes only. The average score includes Strategy Equivalent scores where utilized. For Group Series funds, if Strategy Equivalents are included, the specific Strategy Equivalent(s) within each given series will be indicated in the Allocation (Series Funds) and/or Selection (Underlying Funds) section(s) within the detailed report. ACR#5821538 07/23

Style Box


Asset Allocation - Conservative	Asset Allocation - Moderate	Asset Allocation - Aggressive
	American Funds American Balanced R6 PIMCO RealPath Blend Target Date Series Instl T. Rowe Price Personal Risk-Based Series Vanguard LifeStrategy Risk-Based Series Inv	PIMCO RealPath Blend Target Date Series Instl
Large Cap Value	Large Cap Blend	Large Cap Growth
Vanguard Equity-Income Adm	Calvert US Large Cap Core Rspnb Idx I Vanguard 500 Index Admiral	Vanguard Growth Index Admiral
Mid/Smid Cap Value	Mid/Smid Cap Blend	Mid/Smid Cap Growth
Vanguard Mid-Cap Value Index Admiral	iShares Russell Small/Mid-Cap Idx K	JPMorgan Mid Cap Growth R6
Small Cap Value	Small Cap Blend	Small Cap Growth
Vanguard Small Cap Value Index Admiral	Calvert Small-Cap I PIMCO StocksPLUS Small Institutional	TRP Integrated US Small-Cap Gr Eq
International Equity	Global Equity	Cash Alternatives
American Funds New World R6 Goldman Sachs Intl Sm Cp Insghs Instl American Beacon International Eq R5 Vanguard Total Intl Stock Index Admiral	Impax Global Environmental Markets Instl American Funds New Perspective R6	State Street Instl US Govt MMkt Premier The Standard Stable Asset Fund II
Fixed Income	Specialty/Alternatives	Notes
PIMCO Income Instl PIMCO International Bond (USD-Hdg) Instl Eaton Vance High Income Opportunities I Fidelity Total Bond Fund		1. Target Date Fund series show the series name, glidepath risk posture and the average score. 2. Risk based funds are grouped into either conservative, moderate or aggressive style boxes. 3. Only the top 5 scoring funds in each asset class are shown due to spacing concerns.


*Strategy Equivalent Score

Summary of Considerations

Watchlist	Asset Class	Fund	Score
	SCB	PIMCO StocksPLUS Small Institutional	5
	ILCV	American Beacon International Eq R5	6

Add	Asset Class	Fund	Score
	ISMB-P	Vanguard FTSE All-Wld ex-US SmCp Idx Adm	10

Eliminate	Asset Class	Fund	Score	Action	Asset Class	Fund	Score
	ISMB	Goldman Sachs Intl Sm Cp Insghts Instl	8	map to	ISMB-P	Vanguard FTSE All-Wld ex-US SmCp Idx Adm	10

Considerations:  Add  Delete  Watchlist

*Strategy Equivalent Score

Fund Change take place on `11/7/2023 from our last quarterly meeting.

Total Cost Analysis

Transamerica								
Asset Class	Assets		Score	Fund Name	Expense		Revenue Sharing	
	(\$)	(%)			(%)	(\$)	(%)	(\$)
MC	\$6,703,543	20.33%	9	PIMCO RealPath Blend Income Instl	0.35%	\$23,462	0.00%	\$0
MOD	\$4,140,794	12.56%	9	PIMCO RealPath Blend 2025 Institutional	0.31%	\$12,836	0.00%	\$0
MOD	\$4,961,500	15.05%	8	PIMCO RealPath Blend 2030 Institutional	0.25%	\$12,404	0.00%	\$0
MA	\$4,927,908	14.95%	8	PIMCO RealPath Blend 2035 Institutional	0.22%	\$10,841	0.00%	\$0
MA	\$3,809,372	11.55%	9	PIMCO RealPath Blend 2040 Institutional	0.19%	\$7,238	0.00%	\$0
AGG	\$2,613,061	7.93%	9	PIMCO RealPath Blend 2045 Institutional	0.15%	\$3,920	0.00%	\$0
AGG	\$1,257,002	3.81%	9	PIMCO RealPath Blend 2050 Institutional	0.13%	\$1,634	0.00%	\$0
AGG	\$526,438	1.60%	9	PIMCO RealPath Blend 2055 Institutional	0.12%	\$632	0.00%	\$0
AGG	\$182,931	0.56%	-	PIMCO RealPath Blend 2060 Institutional	0.13%	\$238	0.00%	\$0
MA	\$1,848	0.01%	7	T. Rowe Price Spectrum Mod Gr Allc	0.79%	\$15	0.00%	\$0
MC	\$1,372	0.00%	7	Vanguard LifeStrategy Cnsrv Gr Inv	0.12%	\$2	0.00%	\$0
MOD	\$156,398	0.47%	9	American Funds American Balanced R6	0.25%	\$391	0.00%	\$0
LCV	\$192,491	0.58%	9	Vanguard Equity-Income Adm	0.19%	\$366	0.00%	\$0
LCB	\$16,846	0.05%	7	Calvert US Large Cap Core Rspnb Idx I	0.24%	\$40	0.00%	\$0
LCB	\$736,800	2.24%	10	Vanguard 500 Index Admiral	0.04%	\$295	0.00%	\$0
LCG	\$70,256	0.21%	10	Vanguard Growth Index Admiral	0.05%	\$35	0.00%	\$0
MCV	\$116,545	0.35%	9	Vanguard Mid-Cap Value Index Admiral	0.07%	\$82	0.00%	\$0
MCG	\$118,560	0.36%	10	JPMorgan Mid Cap Growth R6	0.70%	\$830	0.00%	\$0
SCV	\$139,338	0.42%	8	Vanguard Small Cap Value Index Admiral	0.07%	\$98	0.00%	\$0
SCB	\$284	0.00%	7	Calvert Small-Cap I	0.94%	\$3	0.00%	\$0
SCB	\$29,893	0.09%	5	PIMCO StocksPLUS Small Institutional	0.75%	\$224	0.00%	\$0
SCG	\$87,680	0.27%	9	TRP Integrated US Small-Cap Gr Eq	0.80%	\$701	0.00%	\$0
SMCB	\$109,850	0.33%	10	iShares Russell Small/Mid-Cap Idx K	0.08%	\$88	0.00%	\$0
IE	\$387,444	1.18%	10	Vanguard Total Intl Stock Index Admiral	0.11%	\$426	0.00%	\$0
ILCV	\$136,785	0.42%	6	American Beacon International Eq R5	0.72%	\$985	0.00%	\$0
ISMB	\$17,322	0.05%	8	Goldman Sachs Intl Sm Cp Insights Instl	0.87%	\$151	0.00%	\$0

Total Cost Analysis

Transamerica								
Asset Class	Assets		Score	Fund Name	Expense		Revenue Sharing	
	(\$)	(%)			(%)	(\$)	(%)	(\$)
EME	\$117,419	0.36%	9	American Funds New World R6	0.57%	\$669	0.00%	\$0
GE	\$233,700	0.71%	10	American Funds New Perspective R6	0.41%	\$958	0.00%	\$0
GE	\$53,847	0.16%	8	Impax Global Environmental Markets Instl	0.91%	\$490	0.00%	\$0
CFI	\$424,957	1.29%	10	Fidelity Total Bond Fund	0.45%	\$1,912	0.00%	\$0
HY	\$277	0.00%	10	Eaton Vance High Income Opportunities I	0.66%	\$2	0.00%	\$0
GFI	\$43,724	0.13%	9	PIMCO International Bond (USD-Hdg) Instl	0.63%	\$275	0.00%	\$0
MSB	\$118,512	0.36%	9	PIMCO Income Instl	0.62%	\$735	0.00%	\$0
SV	\$535,921	1.63%	-	The Standard Stable Asset Fund II	0.00%	\$0	0.00%	\$0
MM	\$166	0.00%	-	State Street Instl US Govt MMkt Premier	0.12%	\$0	0.00%	\$0
Totals	\$32,970,781	100.00%			%	\$		
Weighted Investment Expense					0.25%	\$82,977	0.00%	\$732
Asset-Based Fees					0.27%	\$89,545		
Billed Fees					0.19%	\$62,284		
TOTALS					0.71%	\$234,806		

*Strategy Equivalent Score

Information is for illustrative purposes only and cannot be guaranteed now or in the future.

Fee Summary & Net Recordkeeping Cost

Total Plan Assets: \$32,970,781 as of 09/30/2023; Total Number of Participants: 1014

Fee Summary

Annual Fees:	Transamerica	
Recordkeeper Fees %	0.27%	.24%
Recordkeeper Fees \$	\$90,278	
Net Investment Exp. %	0.25%	
Net Investment Exp. \$	\$82,245	
Advisory Fees %	0.19%	.68%
Advisory Fees \$	\$62,284	
Estimated Total Plan Cost %	0.71%	
Estimated Total Plan Cost \$	\$234,807	

Net Recordkeeping Cost

Assumes 1014 participants	Transamerica
Revenue Sharing	\$732
Asset-Based Fees	\$89,545
Billed Fees	\$62,284
Subtotal	\$152,562
(Advisor Compensation)	(\$62,284)
Net Recordkeeping & Admin. Cost	\$90,278
Cost as %	0.27%
Cost as Participant Average	\$89

Price reduction for .27% to .24% will take place on 12/1/2023



HUMAN RESOURCES COMMITTEE MEETING

Date: December 4, 2023	Program: Human Resources
Agenda Item #: 5	Director: N/A
Subject: Personnel Policies and Procedures Manual Revisions	Officer: Nelson Dibie

Recommended Action

Staff recommends Committee approval for full Board consideration of revisions to the Personnel Policies and Procedures Manual - Policies 3030 Sick Time and 3040 Paid Sick Leave, and Policy 3010 Holidays.

Background

Personnel Policies and Procedures are updated based on changes in the law.

- a. California Paid Sick Leave (PSL) was originally signed into law in 2015, requiring employers to provide 3 days / 24 hours of protected, paid time. Prior to PSL requirements, Fresno EOC offered 12 days of accruable sick time. Upon the requirement of PSL, Fresno EOC proposed and received board approval to offset the mandatory three (3) days from sick time accruals, reducing to nine (9) days of sick time accrual.

On October 4, 2023 Governor Newsome signed SB 616 to expand current California Paid Sick Leave time from 3 days / 24 hours to 5 days / 40 hours. The expansion of legislation is effective January 1, 2024.

By increasing the amount of state-required sick leave, we propose reducing the amount of accrued sick time from nine (9) days to seven (7) days.

- b. Fresno EOC is proposing closing the agency, besides essential operations, and providing paid time off for the period of December 25 – January 1 of each year. Fresno EOC currently provides December 25 and January 1 as paid holidays, and is proposing adding four (4) more paid days off.

Fiscal Impact

The fiscal impact are as follows:

- a. The agency is responsible for two (2) additional days of Paid Sick Leave for all employees as mandated by California legislation. This is approximately \$400,000 of additional paid time.
The proposal of offsetting the two (2) additional days of PSL from accrued Sick Time would reduce the financial burden to Fresno EOC to approximately \$20,000 of additional paid time to non-benefitted employees only.
- b. Based on current compensation, paid closure for four (4) days would cost approximately \$800,000.

Conclusion

If approved by the Committee, this item will move forward for full Board consideration at the December 7, 2023 Commission Meeting. Accrual rates for both CA Paid Sick Leave and agency-provided Sick Time will change effective January 1, 2024.

If not approved by the Committee, Fresno EOC will implement increased Paid Sick Leave at 5 days/ 40 hours as required by state law on January 1, 2024 and will continue providing nine (9) days of sick time accrual per year.



HUMAN RESOURCES COMMITTEE MEETING

Date: December 4, 2023	Program: Human Resources
Agenda Item #: 6	Director: N/A
Subject: Cost of Living Adjustment	Officer: Nelson Dibie

Recommended Action

Staff recommends Committee approval for full Board consideration of a Cost-of-Living Adjustment (COLA) in the amount of 4.7%.

Background

The updated Personnel Policies and Procedures Manual approved by the Board of Commissioners on October 5, 2023 allows us to implement a Cost-of-Living Adjustment. The requested COLA of 4.7% follows the proposed government's increase of 4.7% federal civilian employees in 2024. The Fresno EOC increase will not include Head Start and unionized employees.

Fiscal Impact

Fresno EOC will be fiscally responsible for approximately \$1,800,000 in increased salary and fringe costs. The additional expenses are allocated to the employees' respective program budgets.

Conclusion

If approved by the Committee, this item will move forward for full Board consideration at the December 7, 2023, Commission Meeting.

If not approved by the Committee, eligible employees will continue working at 2022 wages.



HUMAN RESOURCES COMMITTEE MEETING

Date: December 4, 2023	Program: Human Resources
Agenda Item #: 7	Director: N/A
Subject: Employer 401(a) Pension Plan	Officer: Nelson Dibie

Recommended Action

Staff recommends Committee approval for full Board consideration of changing the Employer contribution 401(a) Pension Plan eligibility requirements from two (2) years of service to three (3) months of service effective July 1, 2024.

Background

Fresno EOC staff is proposing multiple strategies in an effort to be more competitive in the job market and retain qualified individuals. One of the strategies staff propose is reducing employee eligibility requirements to be eligible for the 401(a) Pension Plan contributions.

The state and national average for pension plan eligibility is generally between three (3) and six (6) months.

Employers of similar size and services pension plan eligibility varies from date of hire to five (5) years of service.

Boston ABCD (Community Action Partnership) retirement plan eligibility is for employees regularly working 20 hours more per week. After six (6) months of qualified work time, Boston ABCD matches up to 10% of contributions.

Community Action Partnerships in the Central Valley and nearby areas pension eligibility varies from six (6) months to one (1) year of service.

Fiscal Impact

Based on current compensation, the agency will be responsible for approximately \$720,000 in additional pension plan contributions as of July 1, 2024.

Ongoing responsibility for new hires with reduced eligibility time is approximately \$680,000 annually.



Conclusion

If approved by the Committee, this item will move forward for full Board consideration at the December 7, 2023 Commission Meeting. All employees serving three (3) or more months with Fresno EOC will be enrolled in the pension plan and contributions will start as of July 1, 2024.

If not approved by the Committee, Fresno EOC staff will provide alternative proposals for future consideration.



HUMAN RESOURCES COMMITTEE MEETING

Date: December 4, 2023	Program: Human Resources
Agenda Item #: 8	Director: N/A
Subject: Compensation Study	Officer: Nelson Dibie

Recommended Action

Staffs recommends approval for full Board consideration of approving the new salary rate tables to promote pay equity.

Background

Fresno EOC is committed to provide the financial, emotional, and organizational support to our greatest asset, our workforce, to fulfill our vision of “a strong Fresno County where people have resources to shape their future free from poverty”. The HR department engaged with an outside independent consultant to carry out salary compensation. A primary goal of the Compensation Study was to ensure pay equity as it compares to market salaries for like positions. The scope of the Compensation Study did not include Head Start 0 – 5, or staff whose pay rates are determined by a bargaining agreement.

While this project is months in the making, staff is recommending a phase approach in rolling out the compensation study to allow program budget adjustments:

- Market adjustments for exempt staff including Managers, Directors and Officers will be effective during the first pay period in January 2024.
- Beginning with the hourly (non-exempt) staff, market adjustments will be effective during the first pay period in March 2024.

Fiscal Impact

The financial impact of this study for the adjusted salary table and alignment with market annually is approximately \$3.6 million dollars including fringe cost increases. Approximately 100% of this increase will be funded out of existing program budgets and future program budget modifications.



Conclusion

If approved by the full Board, the compensation plan will be implemented and market adjustments for staff will occur in the three phases as outlined above.

If not approved, pay equity will remain unadjusted, there will be a greater risk of losing staff and increased challenges for recruiting for open positions.

Fresno Economic Opportunities Commission

Compensation Study 2023

Executive Positions

November 2023



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Introduction and Background

Established in 1965, the Fresno Economic Opportunities Commission (Fresno EOC) is a private non-profit Community Action Agency that serves at the forefront continuing the war on poverty, providing opportunities, strengthening self-sufficiency, and offering support for all people. With more than 1,200 full- time and part-time employees, an annual budget of approximately \$130 million, over 30 human service programs that touch the lives of more than 175,000 Fresno County residents annually, Fresno EOC is one of the largest Community Action Agencies in the country. The agency's program offerings range from preschool education to vocational training; from youth recreation to senior citizen hot meal services; from energy conservation education to crisis intervention; from preventive health care to prenatal nutrition education; and from vocational counseling to job placement services.

Fresno EOC is committed to a diverse workforce that is reflective of the communities it serves. This requires, among other things, a compensation structure that both attracts qualified and diverse candidates, and retains and motivates its talented workforce. The primary objective of this study was to conduct a compensation analysis of the cash compensation for Fresno EOC's workforce. This report represents the results of the first phase of this study, and focuses on the organization's executive leadership team with the purpose of identifying and recommending appropriate salary ranges for executive positions throughout the organization, and recommending appropriate total executive compensation targets to ensure market competitiveness.

Compensation Philosophy

A compensation philosophy lays out the guiding principles and serves as a mission statement for an organization's compensation policy and provides the strategic approach to compensation and benefits. In February 2021, the Director of Human Resources presented to the Human Resources Committee of the Board of Directors several goals intended to provide a high-level view of the Agency's position in regard to compensation. The goals of Fresno EOC's approach to compensation are to:

- Ensure and maintain pay equity (internal and external).
- Ensure affordability and sustainability for Fresno EOC over time.
- Attract quality talent with values aligned to Fresno EOC.
- Recognize high performers by providing growth opportunities.
- Identify and communicate pay standards for greater consistency and transparency.
- Support Fresno EOC's goals and culture.

Methodology

Fresno EOC contracted with Sjoberg Evashenk Consulting to conduct an executive compensation study including each of its Executive positions—i.e., Chief Executive Officer, Deputy CEO, Chief Financial Officer, Chief Programs Officer, Human Resources Officer, Chief Information Officer, and Program Officer. In the past we have met with Fresno EOC management to discuss its compensation program and previous compensation studies. We also reviewed in detail the executive compensation that we conducted for Fresno EOC in 2021 to ensure we maintain a consistent methodology. We also obtained feedback regarding the key elements desired by management to be included in the study. Based on this feedback, we performed the following procedures:

- Reviewed background documentation related to Fresno EOC’s compensation practices, including its compensation plan, organizational charts, proposed compensation philosophy goals, position and salary tables, position descriptions, and other background information.
- Conducted the compensation survey analysis using a two-pronged approach.
 - First, utilizing three nationally recognized published surveys for compensation research, we identified matching positions and identified market compensation for each position for which we could find a similar position in the survey. The surveys used for the compensation study included:
 - Economic Research Institute (ERI) Salary Assessor compiles compensation data from over 565,000 organizations. The Salary Assessor obtains current competitive data for over 6,100 jobs from digitized public records including the US SEC, OCR of US IRS returns, ERI’s own salary surveys, and licensed U.S. salary surveys and datasets. The Salary Assessor database is updated quarterly and was used in our analysis of compensation for executive positions.
 - CompAnalyst compiles compensation data for more than 4,000 jobs in 21 industry classifications, 29 organization size categories, and over 200 geographic listings. Data is compiled from its own salary surveys as well as licensed U.S. salary surveys and data sets. CompAnalyst data is updated monthly and was used in our analysis of compensation for executive positions.
 - Compdata Survey of Executive Compensation was also used in our analysis of compensation for executive positions. Compdata compiles base salary, incentive, and total cash compensation data on 135 executive positions. Data is obtained from 5,000 organizations covering nearly 5 million incumbents and is updated quarterly. The survey also provides limited data on incentive pay.

Data obtained through published surveys is analyzed by those surveys to a specific location and to a certain date. For the purpose of this study, the location used is Fresno, California and the date is January 1, 2024

- Second, for the seven executive positions, we researched federal Form 990 tax filings for 15 of the potential survey participants that were considered most similar to Fresno EOC; Form 990 filings contain reliable information on executive compensation for not-for-profit organizations. For market data obtained through Form 990 filings, we:
 - Geographically assessed the salary data from agencies located outside of California's Central Valley. Geographical assessment takes into account that different locations will pay more or less for the same position based on economic forces in effect in those locations. Using a national geographic assessor database, we determined the amount to increase or decrease the salaries reported in Form 990s in locations outside of the Central Valley.
 - The most recent Form 990s available covered the fiscal years 2021 and 2022. Form 990s are completed by each non-profit agency using the agency's fiscal year. However, the compensation data is from the calendar year that ends in the fiscal year. Generally, if the fiscal year ends on any date other than December 31, the compensation information is from calendar year 2021. If the fiscal year ends on December 31, 2022, the compensation information is from calendar year 2022. To ensure comparability to current data, the data from Form 990s must be "aged." We age the data by applying a percentage that (as reported by national professional compensation organizations) represents the amount by which executive salaries have increased from one year to the next. All data was aged to January 1, 2024. On average, the data was aged by 3 percent per year.
 - Positions in the Form 990 filings were matched to the Fresno EOC positions by title only. Form 990s do not provide descriptions or summaries of the positions listed in the filing.
- Conducted statistical analyses of the compensation data to determine the 25th percentile, median (50th percentile), 75th percentile and average (statistical mean) of the published survey salary data and the aged and geographically assessed actual salaries from the Form 990s, when there were five or more matching positions.
- Prepared, based on the results of this analysis, our findings and recommendations for changes to the current compensation program, which addresses internal equity and external competitiveness.

This study was conducted in November 2023.

Results and Recommendations

As previously noted, we collected data from published surveys and, for the executive positions, federal Form 990s. The remainder of this report presents the results of our analysis.

Total Cash Compensation Analysis—Executive

The results of the published survey and Form 990 compensation analyses are presented in Table 1. These results provide the following statistical metrics for each executive position: 25th percentile, 50th percentile (median), 75th percentile, and average (statistical mean). In separate Appendix A we provide detailed data on the published survey analysis and in Appendix B we provide the detailed and raw Form 990 data; this data has not been aged to January 1, 2024 and has not been geographically assessed.

The data in Table 1 below has been aged and geographically assessed to provide comparison to Fresno EOC's executive salaries in effect on January 1, 2024.

Table 1. Summary Results of Published Surveys and Form 990 Compensation Analysis

EXECUTIVE COMPENSATION STUDY DATA RESULTS UPDATED TO JANUARY 1, 2024								
				UPDATED DATA				
SURVEY	SURVEY POSITION	INDUSTRY / SCOPE	# of Cases		Average	25th Percentile	Median	75th Percentile
Chief Executive Officer								
Form 990 Custom Survey	Various	Not-for-Profit Social Service Agencies \$51 - \$458 million revenue	18	Salary	\$262,305	\$200,717	\$213,081	\$297,584
				Total Compensation	\$276,645	\$200,717	\$213,081	\$297,584
Published Survey Data	CEO	See Published Survey Data Results	3	Salary	\$509,750	\$345,917	\$470,403	\$660,610
				Total Compensation	\$828,392	\$570,346	\$715,787	\$1,078,461
Deputy CEO								
Form 990 Custom Survey	Various	Not-for-Profit Social Service Agencies \$51 - \$458 million revenue	18	Salary	\$202,065	\$154,406	\$181,883	\$224,885
				Total Compensation	\$205,564	\$157,178	\$181,883	\$224,885
Published Survey Data	Various	See Published Survey Data Results	3	Salary	\$283,829	\$222,683	\$267,435	\$334,819
				Total Compensation	\$367,952	\$287,555	\$352,317	\$471,526
Chief Financial Officer								
Form 990 Custom Survey	Various	Not-for-Profit Social Service Agencies \$51 - \$458 million revenue	13	Salary	\$202,673	\$162,640	\$185,716	\$218,996
				Total Compensation	\$208,729	\$162,640	\$193,421	\$218,996
Published Survey Data	CEO	See Published Survey Data Results	3	Salary	\$311,593	\$237,567	\$303,455	\$383,264
				Total Compensation	\$376,725	\$380,424	\$474,921	\$529,482

Table 1. Summary Results of Published Surveys and Form 990 Compensation Analysis (continued)

EXECUTIVE COMPENSATION STUDY DATA RESULTS UPDATED TO JANUARY 1, 2024								
					UPDATED DATA			
SURVEY	SURVEY POSITION	INDUSTRY / SCOPE	# of Cases		Average	25th Percentile	Median	75th Percentile
Chief Programs Officer								
Form 990 Custom Survey	Various	Not-for-Profit Social Service Agencies \$51 - \$458 million revenue	14	Salary	\$173,983	\$144,687	\$156,934	\$177,101
				Total Compensation	\$176,109	\$144,687	\$156,934	\$177,101
Published Survey Data	Various	See Published Survey Data Results	3	Salary	\$228,722	\$185,181	\$218,423	\$268,077
				Total Compensation	\$305,217	\$240,279	\$288,234	\$379,210
Human Resources Officer								
Form 990 Custom Survey	Various	Not-for-Profit Social Service Agencies \$51 - \$458 million revenue	5	Salary	\$158,617	\$140,343	\$148,180	\$182,110
				Total Compensation	\$159,657	\$140,394	\$153,279	\$182,110
Published Survey Data	Various	See Published Survey Data Results	3	Salary	\$243,652	\$188,716	\$226,770	\$282,508
				Total Compensation	\$310,075	\$237,468	\$290,759	\$353,880
Chief Information Officer								
Form 990 Custom Survey	Various	Not-for-Profit Social Service Agencies \$51 - \$458 million revenue	4	Salary	\$169,687	\$134,720	\$144,243	\$230,098
				Total Compensation	\$169,687	\$134,720	\$144,243	\$230,098
Published Survey Data	Various	See Published Survey Data Results	3	Salary	\$246,043	\$191,906	\$233,189	\$292,199
				Total Compensation	\$303,808	\$238,356	\$284,533	\$357,984
Program Officer								
Form 990 Custom Survey	Various	Not-for-Profit Social Service Agencies \$51 - \$458 million revenue	1	Salary	\$147,886	\$122,984	\$133,394	\$150,536
				Total Compensation	\$149,693	\$122,984	\$133,394	\$150,536
Published Survey Data	Various	See Published Survey Data Results	3	Salary	\$183,855	\$154,850	\$175,186	\$206,984
				Total Compensation	\$227,552	\$187,781	\$213,415	\$270,738

We recognize that the published survey data is significantly higher than the Form 990 compensation data. This may be due to the inclusion of organizations that are not as closely aligned with the nature and purpose of Fresno EOC as are the 15 non-profit agencies for which we obtained Form 990 data. Each of those agencies are private non-profit Community Action Agencies, similar to Fresno EOC, or are other similarly situated private non-profit human services agencies. The nature of large-scale compensation survey databases requires that they include a wide variety of organizations, and provide several methods for homing in on the types of agencies desired in a particular analysis. They do not, however, provide such precision that allows for an analysis of only Community Action Agencies, or of only private, non-profit human services agencies. Based on our assessment, there is the potential that the ERI survey included for-profit entities and CompAnalyst included non-similar healthcare and legal service organizations. Due to the nature of these survey databases, we are not able to remove the unwanted types of industries from the analysis. We also do not believe that such agencies should necessarily be excluded from the analysis; it is certainly feasible that such organizations may compete with Fresno EOC for executive talent.

Nevertheless, we do find that the entities included in the Form 990 data analysis are more closely aligned in type and size to Fresno EOC than the published survey data. Therefore, we recommend reasonable compensation ranges that lie between the Form 990 data and the published survey data. The ranges

recommended below (Table 2) include, at a minimum, the 25th percentile of the published survey data, which will provide for reasonable market competitiveness.

Our recommendations for the Chief Executive Officer, Deputy CEO, Chief Financial Officer and Chief Program Officer are based completely on the market data for each position. However, the recommendations for Chief Information Officer, HR Officer, and Program Officer place all three of these positions in the same range because of Fresno EOC's practice of internal equity and very similar compensation for other executive roles.

Table 2. Recommended 2024 Salary Ranges for Executive Positions

POSITION	RECOMMENDED BASE SALARY RANGE			INCUMBENT SALARY
	MINIMUM	MIDPOINT	MAXIMUM	
Chief Executive Officer	\$191,500	\$273,000	\$354,500	\$211,965
Deputy CEO / Chief Operating Officer	\$155,500	\$221,500	\$287,500	\$180,000
Chief Financial Officer	\$155,500	\$221,500	\$287,500	\$165,935
Chief Programs Officer	\$138,500	\$197,000	\$255,500	\$163,050
Chief Information Officer	\$125,000	\$178,000	\$231,000	\$152,908
Human Resources Officer	\$125,000	\$178,000	\$231,000	\$150,000
Programs Officer	\$125,000	\$178,000	\$231,000	-

The recommended range spread for these executive positions is 85%. It is very common to set wide range spreads for executive positions, especially those that are or report to the head of the organization. There is only one opportunity for promotion within the organization for the non-CEO positions and none for the CEO, so providing a large range of base pay allows the executive's pay to grow over time without reaching the upper limit. A wide range spread also offers the ability to promote from within at reasonable starting compensation that provides an increase from the promoted employee's current pay, while recognizing that the individual does not have the breadth of experience in the executive role. Additionally, it should be noted that depending on the financial condition of the Fresno EOC, consideration of a variable pay program for executive positions would be consistent with the market to compensation and benefits.

Appendix A: Published Survey Date for Executive Positions

FRESNO ECONOMIC OPPORTUNITIES COMMISSION								
EXECUTIVE COMPENSATION STUDY DATA RESULTS								
UPDATED TO JANUARY 1, 2024								
					UPDATED DATA			
SURVEY	SURVEY POSITION	INDUSTRY/SCOPE	# of Cases		Average	25th Percentile	Median	75th Percentile
Chief Executive Officer								
ERI	Chief Executive Officer	Human Services, Fresno, CA	NA	Salary	\$381,857	\$275,252	\$377,726	\$511,521
Salary Assessor		1,200 Employees, \$115M budget		Total Compensation	\$689,012	\$493,773	\$681,810	\$926,545
CompAnalyst	Chief Executive Officer	Non-Profit Agencies*, Fresno, CA	NA	Salary	\$447,200	\$322,600	\$426,400	\$549,900
CompAnalyst Market Data		1,000 - 3,000 FTEs, \$50M - \$200M Rev		Total Compensation	\$894,400	\$645,100	\$852,700	\$1,099,000
CompData	Chief Executive Officer	Not-for-Profit, CA**	34	Salary	\$700,194	\$439,900	\$607,082	\$920,408
		1,000 - 4,999.9 FTEs; \$75.0 - \$299.9M Rev		Total Compensation	\$901,765	\$572,165	\$612,850	\$1,209,838
Deputy CEO								
ERI	Second Highest Executive	Human Services, Fresno, CA	NA	Salary	\$293,649	\$224,521	\$290,398	\$377,508
Salary Assessor		1,200 Employees, \$115M budget		Total Compensation	\$435,108	\$325,738	\$430,442	\$569,154
CompAnalyst	Top Operations Executive	Non-Profit Agencies*, Fresno, CA	NA	Salary	\$343,800	\$266,800	\$327,600	\$404,500
CompAnalyst Market Data		1,000 - 3,000 FTEs, \$50M - \$200M Rev		Total Compensation	\$434,100	\$360,200	\$442,200	\$546,100
CompData	Top Division Operations Executive+	Not-for-Profit, CA**	7	Salary	\$214,039	\$176,727	\$184,308	\$222,449
		1,000 - 4,999.9 FTEs; \$75.0 - \$299.9M Rev		Total Compensation	\$234,649	\$176,727	\$184,308	\$299,323
Chief Financial Officer								
ERI	Chief Financial Officer	Human Services, Fresno, CA	NA	Salary	\$248,597	\$182,733	\$245,803	\$327,718
Salary Assessor		1,200 Employees, \$115M budget		Total Compensation	\$374,826	\$275,769	\$370,770	\$494,900
CompAnalyst	Chief Financial Officer	Non-Profit Agencies*, Fresno, CA	NA	Salary	\$391,500	\$287,300	\$377,500	\$483,100
CompAnalyst Market Data		1,000 - 3,000 FTEs, \$50M - \$200M Rev		Total Compensation	\$588,700	\$430,900	\$566,700	\$724,600
CompData	Chief Financial Officer	Not-for-Profit, CA**	52	Salary	\$294,683	\$242,668	\$287,061	\$338,973
		1,000 - 4,999.9 FTEs; \$75.0 - \$299.9M Rev		Total Compensation	\$324,450	\$298,803	\$329,394	\$368,946

*Healthcare and Social & Legal Services

**Geographically assessed to Fresno, CA

FRESNO ECONOMIC OPPORTUNITIES COMMISSION								
EXECUTIVE COMPENSATION STUDY DATA RESULTS								
UPDATED TO JANUARY 1, 2024								
					UPDATED DATA			
SURVEY	SURVEY POSITION	INDUSTRY/SCOPE	# of Cases		Average	25th Percentile	Median	75th Percentile
Chief Programs Officer								
ERI	Chief Operating Officer-	Human Services, Fresno, CA	NA	Salary	\$238,045	\$172,768	\$235,400	\$316,798
Salary Assessor		1,200 Employees, \$115M budget		Total Compensation	\$370,909	\$269,260	\$366,935	\$495,150
CompAnalyst	Chief Program Officer	Non-Profit Agencies*, Fresno, CA	NA	Salary	\$262,000	\$229,100	\$259,600	\$294,000
CompAnalyst Market Data		1,000 - 3,000 FTEs, \$50M - \$200M Rev		Total Compensation	\$340,700	\$297,900	\$337,500	\$382,200
CompData	Top Division Operations Executive	Not-for-Profit, CA**		Salary	\$186,121	\$153,676	\$160,268	\$193,434
		1,000 - 4,999.9 FTEs; \$75.0 - \$299.9M Rev		Total Compensation	\$204,043	\$153,676	\$160,268	\$260,281
Human Resources Officer								
ERI	Chief HR Officer	Human Services, Fresno, CA	NA	Salary	\$194,009	\$145,943	\$191,767	\$250,418
Salary Assessor		1,200 Employees, \$115M budget		Total Compensation	\$256,737	\$194,199	\$253,867	\$331,416
CompAnalyst	Chief HR Officer	Non-Profit Agencies*, Fresno, CA	NA	Salary	\$295,000	\$244,900	\$284,500	\$332,500
CompAnalyst Market Data		1,000 - 3,000 FTEs, \$50M - \$200M Rev		Total Compensation	\$413,000	\$342,900	\$398,300	\$465,000
CompData	Top HR Executive	Not-for-Profit, CA**	5	Salary	\$241,947	\$175,306	\$204,043	\$264,607
				Total Compensation	\$260,487	\$175,306	\$220,111	\$265,225
Chief Information Officer								
ERI	Chief Technology Officer	Human Services, Fresno, CA	NA	Salary	\$225,042	\$178,689	\$222,483	\$280,706
Salary Assessor		1,200 Employees, \$115M budget		Total Compensation	\$273,086	\$214,204	\$270,046	\$344,111
CompAnalyst	Top IT Officer	Non-Profit Agencies*, Fresno, CA	NA	Salary	\$228,600	\$190,000	\$223,600	\$263,200
CompAnalyst Market Data		1,000 - 3,000 FTEs, \$50M - \$200M Rev		Total Compensation	\$331,500	\$275,500	\$324,200	\$381,700
CompData	Chief Information Officer	Not-for-Profit, CA**	15	Salary	\$284,486	\$207,030	\$253,483	\$332,690
		1,000 - 4,999.9 FTEs; \$75.0 - \$299.9M Rev		Total Compensation	\$306,837	\$225,364	\$259,354	\$348,140
Program Officer								
ERI	Vice President Programs	Human Services, Fresno, CA	NA	Salary	\$170,663	\$139,191	\$168,670	\$206,633
Salary Assessor		1,200 Employees, \$115M budget		Total Compensation	\$219,624	\$179,502	\$217,142	\$266,105
CompAnalyst	Chief Program Officer -	Non-Profit Agencies*, Fresno, CA	NA	Salary	\$222,700	\$194,735	\$220,660	\$249,900
CompAnalyst Market Data		1,000 - 3,000 FTEs, \$50M - \$200M Rev		Total Compensation	\$289,595	\$253,215	\$286,875	\$324,870
CompData	Top Division Operations Executive -	Not-for-Profit, CA**	15	Salary	\$158,203	\$130,625	\$136,228	\$164,419
		1,000 - 4,999.9 FTEs; \$75.0 - \$299.9M Rev		Total Compensation	\$173,437	\$130,625	\$136,228	\$221,239

*Healthcare and Social & Legal Services

**Geographically assessed to Fresno, CA

Appendix B. Form 990 Data for Executive Positions

CEO Compensation - Form 990 Data latest available

				Schedule J Part II										
Organization	Location	Revenue	Date Reporting (Year End)	A (i) Name	A (ii) Title	B (i) Base	B (ii) Incentive	Base plus Incentive	B (iii) Other	(C) Deferred	(D) Non-taxable Benefits	TCC (w/o Deferred)	TCC as % of Rev	(E) Total
Client Data	Fresno, CA	\$115,983,095	12/31/2021	Brian Angus		\$194,762		\$194,762		\$19,585		\$194,762	0.17%	\$214,347
Central Valley Regional Center	Fresno, CA	\$458,221,191	6/30/22	Ayad M Araim	Executive Director	\$227,300	\$0	\$227,300	\$0	\$19,970	\$8,686	\$235,986	0.05%	\$255,956
Northwest Community Action Center/Yakima Valley Farm Workers Clinic	Toppenish, WA	\$324,495,345	03/31/2022	Juan Carlos Olivares	CEO	\$668,902	\$232,376	\$901,278	\$240,041	\$8,700	\$16,485	\$1,157,804	0.36%	\$1,166,504
Action for Boston Community Development INC (ABCD)	Boston, MA	\$238,227,271	8/31/2022	John Drew	President/CEO	\$297,777	\$0	\$297,777	\$0	\$29,204	\$14,767	\$312,544	0.13%	\$341,748
Community and Economic Development Association of Cook County Inc (CEDA)	Boston, MA	\$238,227,271		Sharon Scott-Chandler	President/CEO	\$224,490	\$0	\$224,490	\$0	\$23,242	\$32,903	\$257,393	0.11%	\$280,635
Sacramento Employment and Training Agency (SETA)	Chicago, IL	\$235,050,308	6/30/2022	Harold Rice	President/CEO	\$256,154	\$0	\$256,154	\$3,048	\$6,601	\$16,737	\$275,939	0.12%	\$282,540
Young Men's Christian Association of San Francisco	San Francisco, CA	\$97,929,346	6/30/2022	Jamie Bruning-Miles	President & CEO	\$399,787	\$0	\$399,787	\$0	\$13,206	\$10,075	\$409,862	0.42%	\$423,068
Community Action Partnership of San Luis Obispo, Inc. (CAPSLO)	San Luis Obispo, CA	\$99,105,503	3/31/2022	Elizabeth Steinberg	CEO	\$194,358	\$0	\$194,358	\$0	\$11,700	\$3,556	\$197,914	0.20%	\$209,614
Fresno Housing Authority								\$0				\$0	#DIV/0!	
Wayne Metropolitan CAA (Detroit)	Detriot, MI	\$188,722,038	9/30/2021	Louis D Piszker	Chief Executive Officer	\$264,854	\$0	\$264,854	\$0	\$15,241	\$17,454	\$282,308	0.15%	\$297,549
Community Teamwork, Inc.	Lowell, MA	\$200,557,174	6/30/2022	Karen Frederick	CEO	\$184,841	\$0	\$184,841	\$0	\$9,559	\$8,427	\$193,268	0.10%	\$202,827
Community Action Partnership of Kern (CAPK)	Bakersfield, CA	\$119,116,159	2/28/2022	Jeremy T Tobias	CEO	\$200,322	\$0	\$200,322	\$0	\$30,095	\$27,882	\$228,204	0.19%	\$258,299
Hopelink	Redmond, WA	\$82,526,550	6/30/2022	Dr. Catherine Cushinberry	CEO	\$170,817	\$0	\$170,817	\$35,000	\$0	\$7,449	\$213,266	0.26%	\$213,266
Community Food Bank/Central California Food Bank	Fresno, CA	\$101,987,814	6/30/2022	Kim Dildine	Co-CEO	\$137,709	\$0	\$137,709	\$0	\$8,455	\$6,790	\$144,499	0.14%	\$152,954
Gateway Community Action Partnership	Fresno, CA	\$101,987,814	6/30/2022	Natalie Caples	Co-CEO	\$125,392	\$0	\$125,392	\$14,982	\$0	\$0	\$140,374	0.14%	
Turning Point of Central California Inc.	Bridgeton, NJ	\$63,714,184	6/30/2022	Albert Kelly	President CEO	\$197,377	\$0	\$197,377	\$0	\$0	\$25,440	\$222,817	0.35%	\$222,817
Corporation	Visalia, CA	\$66,456,982	6/30/2022	Raymond Banks	Chief Executive Officer	\$352,001	\$0	\$352,001	\$0	\$18,988	\$10,281	\$362,282	0.55%	\$381,270
Community Renewal Team Inc	Union City, NJ	\$64,410,905	1/31/2022	Joan Quigley	President/CEO	\$226,330	\$0	\$226,330	\$2,745	\$0	\$13,304	\$242,379	0.38%	\$242,379
	Hartford, CT	\$50,782,274	12/31/2021	Magdalena Rodriguez	President/CEO	\$295,122	\$0	\$295,122	\$0	\$34,800	\$9,466	\$304,588	0.60%	\$339,388

COO Compensation - Form 990 Data latest available

				Schedule J Part II										
Organization	Location	Revenue	Date Reporting (Year End)	A (i) Name	A (ii) Title	B (i) Base	B (ii) Incentive	Base plus Incentive	B (iii) Other	(C) Deferred	(D) Non-taxable Benefits	TCC (w/o Deferred)	TCC as % of Rev	(E) Total
Client Data	Fresno, CA	\$115,983,095	12/31/2021					\$0				\$0	0.00%	
Central Valley Regional Center	Fresno, CA	\$458,221,191	6/30/22	NM	NM			\$0				\$0	0.00%	
Northwest Community Action Center/Yakima Valley Farm Workers Clinic	Toppenish, WA	\$324,495,345	03/31/2022	Glen Davis	Director of Operations	\$341,686	\$32,424	\$374,110	\$12,476	\$8,700	\$8,850	\$395,436	0.12%	\$404,136
Action for Boston Community Development INC (ABCD)	Boston, MA	\$238,227,271	8/31/2022	Christina Seiber	VP Institutional Advancement & Strategy	\$160,872	\$0	\$160,872	\$0	\$16,330	\$13,420	\$174,292	#VALUE!	\$190,622
		\$235,050,308	6/30/2022	John Pady	Chief Expansion Officer	\$145,037	\$10,000	\$155,037	\$374	\$2,250	\$11,764	\$167,175	#VALUE!	\$169,425
Community and Economic Development Association of Cook County Inc (CEDA)	Chicago, IL	\$235,050,308	6/30/2022	Erin Dowland Kabwe	Chief Development Officer	\$153,009	\$0	\$153,009	\$0	\$3,919	\$7,361	\$160,370	#DIV/0!	\$164,289
								\$0				\$0	#DIV/0!	
Young Men's Christian Association of San Francisco	San Francisco, CA	\$97,929,346	6/30/2022	Jamie Bruning-Miles	EVP & COO	\$399,787	\$0	\$399,787	\$0	\$13,206	\$10,075	\$409,862	0.42%	\$423,068
		\$97,929,346	6/30/2022	Kathy Cheng	Former EVP & CFO/CAO	\$309,969	\$0	\$309,969	\$0	\$15,968	\$5,856	\$315,825	0.32%	\$331,793
		\$97,929,346	6/30/2022	Wesley Chip Rich	SVP, Operations	\$257,361	\$0	\$257,361	\$0	\$16,668	\$1,058	\$258,419	0.26%	\$275,087
		\$97,929,346	6/30/2022	Amy Shpall	Chief Advancement Officer	\$277,605	\$0	\$277,605	\$0	\$16,813	\$808	\$278,413	#DIV/0!	\$295,226
		\$97,929,346	6/30/2022	Jane Packer	VP, Marketing, Comms, Brand Strategy	\$190,101	\$0	\$190,101	\$0	\$12,464	\$808	\$190,909	#DIV/0!	\$203,373
		\$97,929,346	6/30/2022	Takija Gardner	VP, Social Services & Govt Relations	\$169,283	\$0	\$169,283	\$0	\$11,780	\$2,976	\$172,259	#DIV/0!	\$184,039
		\$97,929,346	6/30/2022	Chris McComic	VP, Real Estate, Cap Assets, Facility	\$212,944	\$0	\$212,944	\$0	\$13,902	\$684	\$213,628	#DIV/0!	\$227,530
Community Action Partnership of San Luis Obispo, Inc. (CAPSLO)	San Luis Obispo, CA	\$99,105,503	3/31/2022	Suzanne Leedale	COO	\$172,718	\$0	\$172,718	\$0	\$11,399	\$0	\$172,718	0.17%	\$184,117
Fresno Housing Authority								\$0				\$0	#DIV/0!	
Wayne Metropolitan CAA (Detroit)	Detroit, MI	\$188,722,038	09/30/2021	Mia Harnos	Chief Operating Officer	\$180,829	\$15,000	\$195,829	\$0	\$10,824	\$7,732	\$203,561	0.11%	\$214,385
Community Teamwork, Inc.	Lowell, MA	\$200,557,174	6/30/2022	N/M	N/M			\$0				\$0	0.00%	
Community Action Partnership of Kern (CAPK)	Bakersfield, CA	\$119,116,159	2/28/2022	Emilio Wagner	Director of Operations	\$138,952	\$0	\$138,952	\$0	\$10,792	\$20,319	\$159,271	0.13%	\$170,063
		\$119,116,159	2/28/2022	Pritika Ram	Chief Business Development Officer	\$140,920	\$0		\$0	\$10,679	\$7,122			\$158,721
Hopelink	Redmond, WA	\$82,526,550	6/30/2022	Geoff Crump	COO	\$187,028	\$0	\$187,028	\$720	\$1,673	\$8,959	\$196,707	0.24%	\$198,380
Community Food Bank/Central California Food Bank	Fresno, CA	\$101,987,814	6/30/2022	Randy Wood	Director of Operations			\$0				\$0	0.00%	
Gateway Community Action Partnership	Bridgeton, NJ	\$63,714,184	6/30/2022	Edward Bethea	Executive VP / COO	\$193,749	\$0	\$193,749	\$0	\$0	\$37,061	\$230,810	0.36%	\$230,810
Turning Point of Central California Inc.	Visalia, CA	\$66,456,982	6/30/2022	Sharon Ross	Chief Operations Officer	\$181,141	\$0	\$181,141	\$0	\$8,957	\$6,821	\$187,962	0.28%	\$196,919
North Hudson Community Action Corporation	Union City, NJ	\$64,410,905	1/31/2022	Rebecca Acosta	Executive Vice President			\$0				\$0	0.00%	
Community Renewal Team Inc	Hartford, CT	\$50,782,274	12/31/2021	N/M	N/M			\$0				\$0	0.00%	

Fresno EOC

CFO - Form 990 Data latest available

Schedule J Part II														
Organization	Location	Revenue	Date Reporting (Year End)	A (i) Name	A (ii) Title	B (i) Base	B (ii) Incentive	Base plus Incentive	B (iii) Other	(C) Deferred	(D) Non-taxable Benefits	TCC (w/o Deferred)	TCC as % of Rev	(E) Total
<i>Client Data</i>	<i>Fresno, CA</i>	<i>\$115,983,095</i>	<i>12/31/2021</i>					\$0				\$0	0.00%	
Central Valley Regional Center	Fresno, CA	\$458,221,191	6/30/22	Joshua Carillo	CFO	\$112,462	\$0	\$112,462	\$10,168			\$122,630	0.03%	
Northwest Community Action Center/Yakima Valley Farm Workers Clinic	Toppenish, WA	\$324,495,345	03/31/2022	Christine S Trotter	CFO	\$339,698	\$39,606	\$379,304	\$56,214	\$8,700	\$16,684	\$452,202	0.14%	\$460,902
Action for Boston Community Development INC (ABCD)	Boston, MA	\$238,227,271	8/31/2022	Marjorie Lombard	VP/CFO	\$200,914	\$0	\$200,914	\$0	\$20,138	\$13,686	\$214,600	0.09%	\$234,738
Community and Economic Development Association of Cook County Inc (CEDA)	Chicago, IL	\$235,050,308	6/30/2022	Glen Ofenloch	CFO	\$239,911	\$0	\$239,911	\$1,032	\$6,002	\$1,215	\$242,158	0.10%	\$248,160
Sacramento Employment and Training Agency (SETA)								\$0				\$0	#DIV/0!	
Young Men's Christian Association of San Francisco	San Francisco, CA	\$97,929,346	6/30/2022	Mittie Grigsby	SVP & CFO	\$164,893	\$0	\$164,893	\$0	\$0	\$1,472	\$166,365	0.17%	\$166,365
Community Action Partnership of San Luis Obispo, Inc. (CAPSLO)	San Luis Obispo, CA	\$99,105,503	3/31/2022	Joan Limov	CFO	\$160,402	\$0	\$160,402	\$0	\$11,700	\$11,480	\$171,882	0.17%	\$183,582
Fresno Housing Authority								\$0				\$0	#DIV/0!	
Wayne Metropolitan CAA (Detroit)	Detroit, MI	\$188,722,038	9/30/2021	William Lane	CFO	\$162,556	\$15,000	\$177,556	\$0	\$9,753	\$6,278	\$183,834	0.10%	\$193,587
Community Teamwork, Inc.	Lowell, MA	\$200,557,174	6/30/2022	Penny Judd	CFO	\$151,660	\$0	\$151,660	\$0	\$7,795	\$8,427	\$160,087	0.08%	\$167,882
Community Action Partnership of Kern (CAPK)	Bakersfield, CA	\$119,116,159	2/28/2022	Tracy Webster	CFO	\$184,511	\$0	\$184,511	\$0	\$13,883	\$1,338	\$185,849	0.16%	\$199,732
Hopelink	Redmond, WA	\$82,526,550	6/30/2022	Amanda Reinhard	CFO	\$154,862	\$0	\$154,862	\$720	\$5,729	\$8,863	\$164,445	0.20%	\$170,174
Community Food Bank/Central California Food Bank	Fresno, CA	\$101,987,814	6/30/2022	Alicia Martin	Director of Finance	\$92,243	\$0	\$92,243	\$9,126	\$0	\$0	\$101,369	0.10%	--
Gateway Community Action Partnership	Bridgeton, NJ	\$63,714,184	6/30/2022	Denise Castley	Chief Financial Officer			\$0				\$0	0.00%	
Turning Point of Central California Inc.	Visalia, CA	\$66,456,982	6/30/2022	David Lozano	Finance Director	\$140,214	\$0	\$140,214	\$0	\$23,756	\$15,862	\$156,076	0.23%	\$179,832
North Hudson Community Action Corporation	Union City, NJ	\$64,410,905	1/31/2022	Michael Shababb	Chief Financial Officer	\$238,009	\$0	\$238,009	\$953	\$0	\$26,872	\$265,834	0.41%	\$265,834
Community Renewal Team Inc	Hartford, CT	\$50,782,274	12/31/2021	Jeffrey Walsh	Chief Financial Officer			\$0				\$0	0.00%	

Chief Programs Officer / Programs Officer Compensation - Form 990 Data latest available

				Schedule J Part II										
Organization	Location	Revenue	Date Reporting (Year End)	A (i) Name	A (ii) Title	B (i) Base	B (ii) Incentive	Base plus Incentive	B (iii) Other	(C) Deferred	(D) Non-taxable Benefits	TCC (w/o Deferred)	TCC as % of Rev	(E) Total
Client Data	Fresno, CA	\$115,983,095	12/31/2021					\$0				\$0	0.00%	
Central Valley Regional Center	Fresno, CA	\$458,221,191	6/30/22	Rachel A Hagans	Director of Case Management	\$146,857	\$0	\$146,857	\$0	\$13,331	\$9,600	\$156,457	0.03%	\$169,788
		\$458,221,191	6/30/22	Cleora Ditommaso	Director of Community Services	\$140,693	\$0	\$140,693	\$0	\$10,117	\$8,800	\$149,493	0.03%	\$159,610
		\$458,221,191	6/30/22	Mark Halvorsen	Director of Case Management	\$138,594	\$0	\$138,594	\$0	\$12,045	\$8,686	\$147,280	0.03%	\$159,325
	Northwest Community Action Center/Yakima Valley Farm Workers Clinic	Toppenish, WA	\$324,495,345	03/31/2022	Kevin Heidrick	Chief Medical Officer	\$306,828	\$26,792	\$333,620	\$312,559	\$13,324	\$8,850	\$655,029	0.20%
Action for Boston Community Development INC (ABCD)	Boston, MA	\$238,227,271	8/31/2022	Yvette Rodriguez	VP Headstart & Childrens Services	\$176,783	\$0	\$176,783	\$0	\$18,046	\$31,413	\$208,196	#VALUE!	\$226,242
		\$238,227,271	8/31/2022	John Wells	VP Real Estate & Energy Services	\$178,276	\$0	\$178,276	\$0	\$18,141	\$13,974	\$192,250	#DIV/0!	\$210,391
Community and Economic Development Association of Cook County Inc (CEDA)	Chicago, IL	\$235,050,308	6/30/2022	Granada Williams	Chief Program Officer	\$221,472	\$0	\$221,472	\$3,048	\$5,355	\$1,073	\$225,593	0.10%	\$230,948
Sacramento Employment and Training Agency (SETA)								\$0				\$0	#DIV/0!	
Young Men's Christian Association of San Francisco	San Francisco, CA	\$97,929,346	6/30/2022	Erin Clark	SVP, Programs and Operations	\$221,071	\$0	\$221,071	\$0	\$15,126	\$684	\$221,755	0.23%	\$236,881
		\$97,929,346	6/30/2022	Marissa Cowan	VP, Child & Youth Development	\$154,548	\$0	\$154,548	\$0	\$10,820	\$9,509	\$164,057	#DIV/0!	\$174,877
		\$99,105,503	3/31/2022	Melinda Solokowski	A (ii) Title	\$157,712	\$0	\$157,712	\$0	\$4,811	\$15,094	\$172,806	0.17%	\$177,617
Community Action Partnership of San Luis Obispo, Inc. (CAPSLO)	San Luis Obispo, CA	\$99,105,503	3/31/2022	Sheri Wilson	CCRC Director (Child Care Resource Connection)	\$133,272	\$0	\$133,272	\$0	\$11,700	\$13,336	\$146,608	0.15%	\$158,308
Fresno Housing Authority								\$0				\$0	#DIV/0!	
Wayne Metropolitan CAA (Detroit)	Detriot, MI	\$188,722,038	9/30/2021	Shama Mounzer	Chief Programs Officer			\$0				\$0	0.00%	
Community Teamwork, Inc.	Lowell, MA	\$200,557,174	6/30/2022	Carl Howell	CPO	\$130,674	\$0	\$130,674	\$0	\$7,095	\$24,498	\$155,172	0.08%	\$162,267
Community Action Partnership of Kern (CAPK)	Bakersfield, CA	\$119,116,159	2/28/2022	Traco Matthews	Chief Program Officer	\$154,940	\$0	\$154,940	\$0	\$4,102	\$105	\$155,045	0.13%	\$159,147
Hopelink	Redmond, WA	\$82,526,550	6/30/2022	Meghan Altimore	VP, Community Services	\$153,421	\$0	\$153,421	\$720	\$7,692	\$656	\$154,797	0.19%	\$162,489
Community Food Bank/Central California Food Bank	Fresno, CA	\$101,987,814	6/30/2022	Casondra Webb	Director of Programs & Partnerships							\$0	0.00%	
Gateway Community Action Partnership	Bridgeton, NJ	\$63,714,184	6/30/2022	N/M	N/M							\$0	0.00%	
Turning Point of Central California Inc.	Visalia, CA	\$66,456,982	6/30/2022	N/M	N/M							\$0	0.00%	
Corporation	Union City, NJ	\$64,410,905	1/31/2022	N/M	N/M							\$0	0.00%	
Community Renewal Team Inc	Hartford, CT	\$50,782,274	12/31/2021	N/M	N/M							\$0	0.00%	

CTO/CIO Compensation - Form 990 Data latest available

				Schedule J Part II										
Organization	Location	Revenue	Date Reporting (Year End)	A (i) Name	A (ii) Title	B (i) Base	B (ii) Incentive	Base plus Incentive	B (iii) Other	(C) Deferred	(D) Non-taxable Benefits	TCC (w/o Deferred)	TCC as % of Rev	(E) Total
Client Data	Fresno, CA	\$115,983,095	12/31/2021					\$0				\$0	0.00%	
Central Valley Regional Center	Fresno, CA	\$458,221,191	6/30/22	David Mata	Director, Information Technology			\$0				\$0	0.00%	
Northwest Community Action Center/Yakima Valley Farm Workers Clinic	Toppenish, WA	\$324,495,345	03/31/2022	Dave Perkins	Chief Information Officer			\$0				\$0	0.00%	
Action for Boston Community Development INC (ABCD)	Boston, MA	\$238,227,271	8/31/2022					\$0				\$0	0.00%	
Community and Economic Development Association of Cook County Inc (CEDA)	Chicago, IL	\$235,050,308	6/30/2022	NM	NM			\$0				\$0	0.00%	
Sacramento Employment and Training Agency (SETA)				—	—			\$0				\$0	#DIV/0!	
Young Men's Christian Association of San Francisco	San Francisco, CA	\$97,929,346	6/30/2022	David Chin	VP, Information Technology	\$171,547	\$0	\$171,547	\$0	\$11,781	\$8,853	\$180,400	0.18%	\$192,181
Community Action Partnership of San Luis Obispo, Inc. (CAPSLO)	San Luis Obispo, CA	\$99,105,503	3/31/2022	NM	NM			\$0				\$0	0.00%	
Fresno Housing Authority				—	—			\$0				\$0	#DIV/0!	
Wayne Metropolitan CAA (Detroit)	Detriot, MI	\$188,722,038	9/30/2021	NM	NM			\$0				\$0	0.00%	
Community Teamwork, Inc.	Lowell, MA	\$200,557,174	6/30/2022	NM	NM			\$0				\$0	0.00%	
Community Action Partnership of Kern (CAPK)	Bakersfield, CA	\$119,116,159	2/28/2022	NM	NM			\$0				\$0	0.00%	
Hopelink	Redmond, WA	\$82,526,550	6/30/2022	Daniel Quirk	Chief Technology Officer	\$145,962	\$0	\$145,962	\$0	\$6,689	\$8,900	\$154,862	0.19%	\$161,551
Community Food Bank/Central California Food Bank	Fresno, CA	\$101,987,814	6/30/2022	Tristan Langstaff	Information Technology Manager			\$0				\$0	0.00%	
Gateway Community Action Partnership	Bridgeton, NJ	\$63,714,184	6/30/2022	NM	NM			\$0				\$0	0.00%	
Turning Point of Central California Inc.	Visalia, CA	\$66,456,982	6/30/2022	Bruce Tyler	Chief Information Officer	\$247,879	\$0	\$247,879	\$0	\$26,785	\$14,366	\$262,245	0.39%	\$289,030
Corporation	Union City, NJ	\$64,410,905	1/31/2022	NM	NM			\$0				\$0	0.00%	
Community Renewal Team Inc	Hartford, CT	\$50,782,274	12/31/2021	Anthony De Luca	Director of IT	\$124,998	\$0	\$124,998	\$0	\$7,500	\$13,194	\$138,192	0.27%	\$145,692

Fresno EOC Chief of Human Resources - Form 990 Data latest available														
				Schedule J Part II										
Organization	Location	Revenue	(Year End)	A (i) Name	A (ii) Title	B (i) Base	B (ii) Incentive	Incentive	B (iii) Other	(C) Deferred	Benefits	Deferred)	TCC as % of Rev	(E) Total
Client Data	Fresno, CA	\$115,983,095	12/31/2021					\$0				\$0	0.00%	
Central Valley Regional Center	Fresno, CA	\$458,221,191	6/30/22					\$0				\$0	0.00%	
Center/Yakima Valley Farm Workers	Toppenish, WA	\$324,495,345	03/31/2022	Villanueva	Human			\$0				\$0	0.00%	
Development INC (ABCD)	Boston, MA	\$238,227,271	8/31/2022	Harold Mezooff	Human	\$179,425	\$0	\$179,425	\$0	\$18,743	\$31,385	\$210,810	0.09%	\$229,553
Development Association of Cook	Chicago, IL	\$235,050,308	6/30/2022					\$0				\$0	0.00%	
Training Agency (SETA)								\$0				\$0	#DIV/0!	
of San Francisco	CA	\$97,929,346	06/30/2022	Andrew Vamis	Effectiveness	\$221,854	\$0	\$221,854	\$0	\$15,640	\$15,528	\$237,382	0.24%	\$253,022
San Luis Obispo, Inc. (CAPSLO)	CA	\$99,105,503	03/31/2022	NM	NM			\$0				\$0	0.00%	
Fresno Housing Authority								\$0				\$0	#DIV/0!	
Wayne Metropolitan CAA (Detroit)	Detroit, MI	\$188,722,038	09/30/2021	NM	NM			\$0				\$0	0.00%	
Community Teamwork, Inc.	Lowell, MA	\$200,557,174	06/30/2022	Lisa Wholey	Resource Officer			\$0				\$0	0.00%	
Kern (CAPK)	Bakersfield, CA	\$119,116,159	02/28/2022	McGranahan	Human	\$127,507		\$127,507		\$4,351	\$25,820	\$153,327	0.13%	\$157,678
Hopelink	Redmond, WA	\$82,526,550	06/30/2022	Anna Michaels	Engagement &	\$152,772	\$5,000	\$157,772	\$0	\$7,824	\$660	\$158,432	0.19%	\$166,256
California Food Bank	Fresno, CA	\$101,987,814	06/30/2022	Marisol Ramirez	Resources			\$0				\$0	0.00%	
Partnership	Bridgeton, NJ	\$63,714,184	06/30/2022	Michelle Brown	Human			\$0				\$0	0.00%	
Inc.	Visalia, CA	\$66,456,982	06/30/2022	Erin Gregg	Resources	\$142,481	\$0	\$142,481	\$0	\$23,756	\$15,862	\$158,343	0.24%	\$182,099
Corporation	Union City, NJ	\$64,410,905	01/31/2022	Castella	Human			\$0				\$0	0.00%	
Community Renewal Team Inc	Hartford, CT	\$50,782,274	12/31/2021	NM	NM			\$0				\$0	0.00%	