Award Justification Statement RFP# 201910183 – Comprehensive Classification and Compensation Review, Analysis and Recommendations

I. Summary

In June 2019, the State and MSEA-SEIU Local 1989 memorialized a Memorandum of Agreement establishing the commission of a comprehensive study of the current Classification and Compensation System. The key deliverables in the contract resulting from this RFP is a report that will contain the following:

- A review of the existing classification/compensation structure and policies, including recommendations for changes or improvements to allow the State to incorporate current best practices and methodologies (should include comparison of classifications for equity across bargaining units and salary spec tables);
- Development of new or updated classifications, including generic classification descriptions and specifications, a crosswalk from current classifications to revised classifications, and a methodology to be used in evaluating positions;
- A comparative analysis of current pay ranges and wage bands to labor market data for similar positions, in Maine and New England, to enable the State to maintain competitiveness;
- Evolving best practices for teleworking policies for State employees, including recommendations for how to manage and develop this more mobile workforce.

II. Evaluation Process

The evaluation team utilized a consensus approach to reviewing the proposals. Each team member reviewed the proposals individually, making notes with their thoughts. The team then met to review the proposals as a group, evaluating the organization's qualifications and experiences, the proposed services the organization would be able to provide, and the proposed cost for those services. Members of the evaluation team included experts in the fields of finance, human resources, and bargaining unions.

Segal Waters Consulting received the highest score from the evaluation team based on the factors stated below.

III. Qualifications & Experience

- An abundance of relevant experiences, specifically with union organizations
- Team members have lots of public sector and/or state agency experience
- Project references were geographically similar to Maine

IV. Proposed Services

- Identified key stakeholders such as HR/Employees/Union Representatives and very clear about each stakeholder's roles and responsibilities throughout the process
- Proposal included information about stipend/differential/special pay types
- Provided clear reporting phases throughout the project
- Experienced in working within legislative and union environments
- Willing to work with the State on phased implementation approach options

V. Cost Proposal

• Budget narrative provided good detail and makes breaking down and understanding the costs easy

VI. Conclusion

In conclusion, the evaluation team felt that the selected bidder provided the most value to the State when considering the overall organizational structure and proposed services in relation to the cost proposal. Key components for the determination came from the proposed regular reporting, vast experiences in the public sector, and a clear and easy to follow budget narrative.

State of Maine <u>RFP / Proposal Master Score Sheet</u>

Instructions: Complete the Master Score Sheet below providing all of the requested information for each bidder that submitted a proposal in response to the RFP. This document is to be included in the Selection Package submitted to the Division of Procurement Services for review/approval.

SCORESHEET FOR RFP# 201910183: Comprehensive Classification and Compensation Review, Analysis and Recommendations							
PROPOSAL SUBMIT	PROPOSAL SUBMITTED BY: Evergreen Solutions, LLC Gallagher Benefit Services, Inc. Segal Waters Consultin				Waters Consulting		
	COST:	Cost:	\$455,500.00	Cost:	\$599,700.00	Cost:	\$565,000.00
EVALUATION ITEM	POINTS AVAIL.						
Section I: Organization Qualifications and Experience	35		12		20		28
Section II: Proposed Services	40		12		27		31
Section III: Cost Proposal	25		8		10		15
(Cost was evaluated using consensus method)							
TOTAL	<u>100</u>		<u>32</u>		<u>57</u>		<u>74</u>



Janet T. Mills Governor Kirsten LC Figueroa Commissioner

December 23, 2019

Jeff Ling, Executive Vice President Evergreen Solutions, LLC 2878 Remington Green Circle Tallahassee, FL 32308

SUBJECT: Notice of Conditional Contract Award under RFP # 201910183, Comprehensive Classification and Compensation Review, Analysis and Recommendations

Dear Jeff Ling:

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Administrative and Financial Services for Comprehensive Classification and Compensation Review, Analysis and Recommendations. The Department has evaluated the proposals received using the evaluation criteria identified in the RFP, and the Department is hereby announcing its conditional contract award to the following bidder:

• Segal Waters Consulting

The bidder listed above received the evaluation team's highest ranking. The Department will be contacting the aforementioned bidder soon to negotiate a contract. As provided in the RFP, the Notice of Conditional Contract Award is subject to execution of a written contract and, as a result, this Notice does NOT constitute the formation of a contract between the Department and the apparent successful vendor. The vendor shall not acquire any legal or equitable rights relative to the contract services until a contract containing terms and conditions acceptable to the Department is executed. The Department further reserves the right to cancel this Notice of Conditional Contract Award at any time prior to the execution of a written contract.

As stated in the RFP, following announcement of this award decision, all submissions in response to the RFP are considered public records available for public inspection pursuant to the State of Maine Freedom of Access Act (FOAA). 1 M.R.S. §§ 401 et seq.; 5 M.R.S. § 1825-B (6).

This award decision is conditioned upon final approval by the State Procurement Review Committee and the successful negotiation of a contract. A Statement of Appeal Rights has been provided with this letter; see below.



Janet T. Mills Governor

Kirsten LC Figueroa Commissioner

This award decision is conditioned upon final approval by the State Procurement Review Committee and the successful negotiation of a contract. A Statement of Appeal Rights has been provided with this letter; see below.

Thank you for your interest in doing business with the State of Maine.

Sincerely,

Heather L'Hommedieu Perreault, CPA Deputy Commissioner of Finance Department of Administrative and Financial Services



Janet T. Mills Governor Kirsten LC Figueroa Commissioner

STATEMENT OF APPEAL RIGHTS

Any person aggrieved by an award decision may request an appeal hearing. The request must be made to the Director of the Bureau of General Services, in writing, within 15 days of notification of the contract award as provided in 5 M.R.S. § 1825-E (2) and the Rules of the Department of Administrative and Financial Services, Bureau of General Services, Division of Purchases, Chapter 120, § (2) (2).



Janet T. Mills Governor Kirsten LC Figueroa Commissioner

December 23, 2019

Ronnie Charles, National Managing Director Gallagher Benefit Services, Inc. 901 Marquette Ave. S. Ste. 1900 Minneapolis, MN 55402

SUBJECT: Notice of Conditional Contract Award under RFP # 201910183, Comprehensive Classification and Compensation Review, Analysis and Recommendations

Dear Ronnie Charles:

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Administrative and Financial Services for Comprehensive Classification and Compensation Review, Analysis and Recommendations. The Department has evaluated the proposals received using the evaluation criteria identified in the RFP, and the Department is hereby announcing its conditional contract award to the following bidder:

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Janet T. Mills Governor

Kirsten LC Figueroa Commissioner

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Sincerely,

Heather L'Hommedieu Perreault, CPA Deputy Commissioner of Finance Department of Administrative and Financial Services



Janet T. Mills Governor Kirsten LC Figueroa Commissioner

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Janet T. Mills Governor Kirsten LC Figueroa Commissioner

December 23, 2019

Elliot R. Susseles, CCP, Senior Vice President The Segal Company (Eastern States) Inc., d/b/a Segal Waters Consulting 333 West 34th Street, 3rd Floor New York, NY 10001-2402

SUBJECT: Notice of Conditional Contract Award under RFP # 201910183, Comprehensive Classification and Compensation Review, Analysis and Recommendations

Dear Elliot R. Susseles:

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Administrative and Financial Services for Comprehensive Classification and Compensation Review, Analysis and Recommendations. The Department has evaluated the proposals received using the evaluation criteria identified in the RFP, and the Department is hereby announcing its conditional contract award to the following bidder:

• Segal Waters Consulting

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This award decision is conditioned upon final approval by the State Procurement Review Committee and the successful negotiation of a contract. A Statement of Appeal Rights has been provided with this letter; see below.



Janet T. Mills Governor Kirsten LC Figueroa Commissioner

Thank you for your interest in doing business with the State of Maine.

Sincerely,

Heather L'Hommedieu Perreault, CPA Deputy Commissioner of Finance Department of Administrative and Financial Services



Janet T. Mills Governor Kirsten LC Figueroa Commissioner

STATEMENT OF APPEAL RIGHTS

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RFP #: 201910183 RFP TITLE: Comprehensive Classification and Compensation Review, Analysis and Recommendations BIDDER: Evergreen Solutions, LLC DATE: 12/18/2019

Instructions: The purpose of this form is to record all evaluation notes and scoring that is obtained through consensus discussions among the full evaluation team for this Request for Proposals (RFP) process. The RFP Coordinator or Lead Evaluator should complete this form and maintain the only copy. This form should reflect the full team's consensus evaluations, and this form is **not** meant to take the place of individual evaluation notes, which are still required from each member of the evaluation team. A separate form is available for individual evaluation notes. Please submit a copy of this document to the Division of Procurement Services as part of your contract award selection documents.

DEPARTMENT NAME: Department of Administration and Financial Services NAME OF RFP COORDINATOR: Jeff Cotnoir NAME OF REVIEW FACILITATOR: Chad Lewis NAME OF REVIEW NOTETAKER: Katie Boynton NAMES OF EVALUATORS: Anne Macri, Breena Bissell, Heather L'Hommedieu Perreault, Holly Pomelow, Thaddeus Cotnoir, and Thomas Feeley

SUMMARY PAGE

		Points Awarded:
Numerical Score:		
Section I. Organization Qualifications and Experience	(Max: 35 Points)	12
Section II. Proposed Services	(Max: 40 Points)	12
Section III: Cost Proposal	(Max: 25 Points)	8
TOTAL POINTS	(Max: 100 Points)	32

RFP #: 201910183 RFP TITLE: Comprehensive Classification and Compensation Review, Analysis and Recommendations BIDDER: Evergreen Solutions, LLC DATE: 12/18/2019

> EVALUATION OF SECTION I Organization Qualifications and Experience

	Total Points Available: 35	<u>Score</u> : 12	
*****	**********	******	*****
Evaluation Team Commer	<u>its</u> :		

- I. Overview of the Organization
 - Experience with county/local more so than state. Did not address experiences with union bargaining units.
 - Proposals didn't specify size of workforces seem smaller.
 - Limited experience in this geographical area
- II. Subcontractors
 - Will not use subcontractors
- III. Organizational Chart
 - Overall organization size seems lean as evidenced by the Director of Marketing also being listed as the Project Principal.
 - Only one person with SHRM/IPMA qualifications
 - The organizational chart is not clear on who is providing which roles
- IV. Litigation
 - No litigations stated
- V. Financial Viability
 - Provided tax returns
 - The contract value would be 20% of their overall annual revenues
- VI. Certificate of Insurance
 - If the document was provided it was inaccessible in the PDF.

RFP #: 201910183 RFP TITLE: Comprehensive Classification and Compensation Review, Analysis and Recommendations BIDDER: Evergreen Solutions, LLC DATE: 12/18/2019

EVALUATION OF SECTION II Proposed Services

	Total Points Available: 40	<u>Score</u> : 12	
*****	***************************************	*****	*****
Evaluation Team Commo	ents:		
	· 1. 1		

- I. Services to be Provided
 - A. Current System Review
 - Proposal lacks birds eye review of current architecture
 - Proposal is much more granular than requested
 - B. Classification Review
 - Proposal is much more granular than requested.
 - Some of the tools looked like they would be very efficient and useful but we're not ready for the level of granularity the tools would provide.
 - C. Compensation Analysis
 - Benefits were discussed frequently which was excluded from the RFP.
 - Only tool mentioned was a market survey of 20 employers; very limited scope
 - Lack of specificity for how the compensation review would be handled
 - D. Telework Best Practices
 - The proposal was limited regarding telework best practices. Telework only addressed under the market survey.
 - E. Deliverables/Expectations
 - Proposal is much more granular than requested.
 - This section was merged with the implementation and work plan.
 - Did not address cost or savings regarding implementation.
 - Did not have a methodology (or options of methodologies) to apply the study to the future reclassifications.
- II. Implementation Work Plan

RFP #: 201910183

RFP TITLE: Comprehensive Classification and Compensation Review, Analysis and Recommendations **BIDDER:** Evergreen Solutions, LLC **DATE:** 12/18/2019

A. Timeline

- Tasks are identified without specifying the individual who will complete each task.
- Provided Gantt chart but no tasks overlap very step by step basis

RFP #: 201910183 RFP TITLE: Comprehensive Classification and Compensation Review, Analysis and Recommendations BIDDER: Evergreen Solutions, LLC DATE: 12/18/2019

EVALUATION OF SECTION III Cost Proposal

Total Points Available: 25 Score: 8

Evaluation Team Comments:

- I. Cost \$455,500.00
 - Only provided hourly rates for individuals working on the project all other costs were rolled into the personnel costs.

II. Budget Narrative

- The budget narrative lacks specificity.
- The individuals listed can't be tied to a specific task, making it difficult to identify costs.

RFP #: 201910183

RFP TITLE: Comprehensive Classification and Compensation Review, Analysis and Recommendations **BIDDER:** Gallagher Benefit Services, Inc.

DATE: 12/18/2019

Instructions: The purpose of this form is to record all evaluation notes and scoring that is obtained through consensus discussions among the full evaluation team for this Request for Proposals (RFP) process. The RFP Coordinator or Lead Evaluator should complete this form and maintain the only copy. This form should reflect the full team's consensus evaluations, and this form is **not** meant to take the place of individual evaluation notes, which are still required from each member of the evaluation team. A separate form is available for individual evaluation notes. Please submit a copy of this document to the Division of Procurement Services as part of your contract award selection documents.

DEPARTMENT NAME: Department of Administration and Financial Services NAME OF RFP COORDINATOR: Jeff Cotnoir NAME OF REVIEW FACILITATOR: Chad Lewis NAME OF REVIEW NOTETAKER: Katie Boynton NAMES OF EVALUATORS: Anne Macri, Breena Bissell, Heather L'Hommedieu Perreault, Holly Pomelow, Thaddeus Cotnoir, and Thomas Feeley

SUMMARY PAGE

		Points Awarded:
Numerical Score:		
Section I. Organization Qualifications and Experience	(Max: 35 Points)	20
Section II. Proposed Services	(Max: 40 Points)	27
Section III: Cost Proposal	(Max: 25 Points)	10
TOTAL POINTS	(Max: 100 Points)	57

RFP #: 201910183

RFP TITLE: Comprehensive Classification and Compensation Review, Analysis and Recommendations **BIDDER:** Gallagher Benefit Services, Inc. **DATE:** 12/18/2019

EVALUATION OF SECTION I Organization Qualifications and Experience

Total	Points	Available:	35
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<u>Score</u>: 20

Evaluation Team Comments:

- I. Overview of the Organization
 - Two project examples don't relay enough information.
 - What services were provided for the projects listed are not totally clear.
 - Projects listed include experience with bargaining unit positions.
 - Project sizes are comparable to Maine.
 - Reference "hundreds" of public sector clients.
 - Have a database with over 300 business entities for market research
 - The division providing services began as a part of Ernst & Young

II. Subcontractors

- No subcontractors will be used.
- III. Organizational Chart
 - The majority of people hold certifications with IPMA/CCP/NPELRA/HRIR
 - Organization chart is related to the proposed plan.
 - There is lots of organizational depth
 - Persons identified in bios and organizational chart don't match
- IV. Litigation
 - Directed reviewers to SEC website, seemed evasive
- V. Financial Viability
 - They appear to have the resources to sustain this project.
 - Referred reviewers to external reports
- VI. Certificate of Insurance
 - All certificates provided expired by October 2019.

RFP #: 201910183 RFP TITLE: Comprehensive Classification and Compensation Review, Analysis and Recommendations BIDDER: Gallagher Benefit Services, Inc. DATE: 12/18/2019

EVALUATION OF SECTION II Proposed Services

	Total Po	ints Available: 40	<u>Score</u> : 27	
	uation Team Comments:	******	***************************************	***
I.	Services to be Provided			

- A. Current System Review
 - The proposal doesn't fully cover a current system review; it incorporates it into the classification review.
 - To the extent it's covered, they identify that the timeline is too short to do more than one or two focus groups.
- B. Classification Review
 - They seem familiar with the breadth of the review and fully aware of the larger scope.
 - Seems to provide more information on what they will not be able to do versus what they will be able to do.
 - Some statements seem conflicting
 - They've identified that there would be a selection of a job evaluation method.
- C. Compensation Analysis
 - They have a broad pool for evaluating compensations access to good information
 - They included an analysis of employee benefits which was something outside the scope of the RFP
 - Included several tasks that were outside the scope of the RFP FLSA, Pay Equity, etc.
 - They addressed identified tasks such as recruiting and retaining competitiveness
 - Specified transition options and next steps were outlined
- D. Telework Best Practices
 - Identified the need to discuss the State's current infrastructure with OIT to see what could be supported.

RFP #: 201910183

RFP TITLE: Comprehensive Classification and Compensation Review, Analysis and Recommendations **BIDDER:** Gallagher Benefit Services, Inc.

DATE: 12/18/2019

- E. Deliverables/Expectations
 - They have a good understanding of the overall objective; however this RFP was about research and recommendations, not implementation and training.
 - Instead of identifying what could be completed in 7 months, they extend the deliverables out over 16 months.
 - They have addressed the ongoing needs of presentations after the initial report is completed.
- II. Implementation Work Plan
 - A. Timeline
 - They provided two timelines one for a 7-month plan and one for a 16-month plan.
 - They identify who should be doing which tasks, however it's a small pool of people.
 - They identify the possibility of a report by August 1, 2020 but go on to say that a "comprehensive, valid, defensible, and accepted study" would need 15-18 months.

RFP #: 201910183 RFP TITLE: Comprehensive Classification and Compensation Review, Analysis and Recommendations BIDDER: Gallagher Benefit Services, Inc. DATE: 12/18/2019 EVALUATION OF SECTION III

Cost Proposal

	<u>Total Points Available</u> : 25	<u>Score</u> : 10	
******	****	******	******
Evaluation Team Commen	<u>its</u> :		

- I. Cost \$599,700.00
 - There is no detail provided on how the costs were determined.
 - There was a large range of hourly rates
 - They provided two timelines but only one cost proposal; unclear how the second timeline would relate to costs
- II. Budget Narrative
 - No budget narrative was provided

RFP #: 201910183 RFP TITLE: Comprehensive Classification and Compensation Review, Analysis and Recommendations BIDDER: Segal Waters Consulting DATE: 12/19/2019

Instructions: The purpose of this form is to record all evaluation notes and scoring that is obtained through consensus discussions among the full evaluation team for this Request for Proposals (RFP) process. The RFP Coordinator or Lead Evaluator should complete this form and maintain the only copy. This form should reflect the full team's consensus evaluations, and this form is **not** meant to take the place of individual evaluation notes, which are still required from each member of the evaluation team. A separate form is available for individual evaluation notes. Please submit a copy of this document to the Division of Procurement Services as part of your contract award selection documents.

DEPARTMENT NAME: Department of Administration and Financial Services NAME OF RFP COORDINATOR: Jeff Cotnoir NAME OF REVIEW FACILITATOR: Chad Lewis NAME OF REVIEW NOTETAKER: Katie Boynton NAMES OF EVALUATORS: Anne Macri, Breena Bissell, Heather L'Hommedieu Perreault, Holly Pomelow, Thaddeus Cotnoir, and Thomas Feeley

SUMMARY PAGE

		Points Awarded:
Numerical Score:		
Section I. Organization Qualifications and Experience	(Max: 35 Points)	28
Section II. Proposed Services	(Max: 40 Points)	31
Section III: Cost Proposal	(Max: 25 Points)	15
TOTAL POINTS	(Max: 100 Points)	74

RFP #: 201910183 RFP TITLE: Comprehensive Classification and Compensation Review, Analysis and Recommendations BIDDER: Segal Waters Consulting

DATE: 12/19/2019

> EVALUATION OF SECTION I Organization Qualifications and Experience

	Total Points Available: 35	<u>Score</u> : 28	
*****	*****	******	*****

Evaluation Team Comments:

- I. Overview of the Organization
 - An abundance of relevant experience, especially with union organizations
 - Project references are geographically relevant but smaller in scope
 - Many states/state agencies are listed in their experiences
 - They provided lots of details and descriptions for each project reference, including completion dates.
- II. Subcontractors
 - No subcontractors will be used.
- III. Organizational Chart
 - A large organization, but a smaller team identified.
 - Most people have CCP, several IPMA/SHRM
 - Identify projects that each individual has worked on
 - Limited identification of individuals to their specific project roles
 - Team members have lots of public sector/state agency experiences
- IV. Litigation
 - No litigation disclosed
- V. Financial Viability
 - Provided password protected financial statements
 - Appear to be a profitable business; bidder is a smaller arm of a larger organization
- VI. Certificate of Insurance
 - Certificate of Insurance provided and up to date.

RFP #: 201910183 RFP TITLE: Comprehensive Classification and Compensation Review, Analysis and Recommendations BIDDER: Segal Waters Consulting DATE: 12/19/2019

EVALUATION OF SECTION II Proposed Services

	Total Points Available: 40	<u>Score</u> : 31	
*****	******	*****	*****
Evaluation Team Commer	<u>nts</u> :		

- I. Services to be Provided
 - A. Current System Review
 - Identified stakeholders as HR/Employees/Union Representatives
 - Very clear about each stakeholder's roles and responsibilities in the process
 - Included information about and employee communication plan
 - Lots of information gathering but lacking on what will be done with the information (closure, recommendations, etc)
 - B. Classification Review
 - Offers proprietary system for job evaluation is this the only option provided? Is it customizable? Ongoing costs?
 - Included granular position to classification review
 - Provided for multiple days to meet with employees, utilizing video conferencing and onsite options
 - Unclear whether the proposal is to meet with all classifications or a benchmark group.
 Appears to lean towards each individual employee which is outside the requested scope of this RFP.
 - C. Compensation Analysis
 - Proposal includes information about stipend/differential/special pays (labeled as fringe benefits)
 - Limited to a small pool of public sector entities for comparable employers
 - Overall methodology seems good
 - Development of a database, to be owned by the State

RFP #: 201910183

RFP TITLE: Comprehensive Classification and Compensation Review, Analysis and Recommendations **BIDDER:** Segal Waters Consulting

DATE: 12/19/2019

- · Positions seem similar to state classifications
- Spell out specifically steering committee roles
- They don't specify who on their team provides which role
- D. Telework Best Practices
 - Mentioned once in the services to be provided section and twice in the compensation assessment
 - Overall, not a lot of information
- E. Deliverables/Expectations
 - Identify reporting throughout the process
 - Recommending policies, identify working with the legislature
 - Cost impact section
 - References the steering committee frequently appears to be a collaborative process
 - Experienced in working with legislative and union environments
 - Policy development is addressed; no information on an appeals process
 - Recommendations in simplifying pay (stipends, differential, special pay)

II. Implementation – Work Plan

- A. Timeline
 - The timeline is ambitious given proposal exceeds requested scope
 - Significant portion of the timeline is tied to a granular classification review.
- B. Implementation
 - Willing to work with State on phased approach options

RFP #: 201910183 RFP TITLE: Comprehensive Classification and Compensation Review, Analysis and Recommendations BIDDER: Segal Waters Consulting DATE: 12/19/2019

EVALUATION OF SECTION III Cost Proposal

Total Points Available: 25 Score: 15

- I. Cost \$565,000.00
 - Most of the cost goes to the classification analysis
 - Cost does not include "optional" services; what the optional services cost is not included

II. Budget Narrative

- Narrative provides good detail and makes understanding the costs easy.
- Differing language in the services provided compared to the budget narrative (no more than versus up to)
- They don't identify any "other project costs"

RFP #: 201910183 RFP TITLE: Comprehensive Classification and Compensation Review, Analysis, and Recommendations BIDDER NAME: Evergreen Solutions, LLC DATE: December 11,2019 EVALUATOR NAME: J. Thaddeus Cotnoir EVALUATOR DEPARTMENT: DAFS, BHR

Instructions: The purpose of this form is to record proposal review notes written by <u>individual</u> evaluators for this Request for Proposals (RFP) process. It is <u>required</u> that each individual evaluator make notes for conduct that he or one review.

each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.

Individual Evaluator Comments:

File 1
? First ¶: RFP number? Texas?
Page 2 – P seems very capable; uses the right jargon
File 2
Page 4: no outside consultants/subcontractors = P
Page 6: ? too many supervisors?
Pp 7-8: ? Dr. Ling's related exp
Pp 8-9: P Ms. Q. Fox
Pp 9-11: ? Ms. N. Berkeley – no classification exp?
Pp 11-12: P Mr. M. Misrahi
P 13: P Mr. Wilburn
P 16 – P Project One – looks very comparable
File 3
P 68: ? Communication Plan: too much emphasis on employee engagement?
Pp 77-88: ?P VERY detailed step-by-step process. Too detailed?
General:
No info regarding telework? One reference on p 83 of file 3

RFP #: 201910183 RFP TITLE: Comprehensive Classification and Compensation Review Analysis and Recommendations BIDDER NAME: Evergreen DATE: 12/17/19 EVALUATOR NAME: Tom Feeley EVALUATOR DEPARTMENT: MSEA-SEIU Local 1989

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Individual Evaluator Comments:

Cost: \$455,550

Overview: I like the detail of their proposal. However, I feel that they give short shrift to initial evaluation of the current system and exploration of alternative models. They do provide very specific recommendations regarding the process for revising classifications and the market analysis. My primary concerns are (1) I don't think they have done anything on the same scale as the Executive Branch, and (2) I am skeptical about whether they can finish within the allotted time.

RFP #: <u>201910183</u> RFP TITLE: <u>Comprehensive Classification and Compensation Review Analysis and Recommendations</u> BIDDER NAME: Evergreen DATE: December 13, 2019 EVALUATOR NAME: Anne Macri EVALUATOR DEPARTMENT: Maine State Employees Association

Instructions: The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.

Individual Evaluator Comments:

Section 1, P1 – P – Maine experience, experience with smaller public employers in New England (VT, MA) N – seems to have very limited statewide experience (MT, AK) P16 – P – Boston project, recommended new system (though unclear if this is completed or ongoing) P17 – P – Virginia project sounds similar P70 – Q – supervisory approval of surveys seems potentially problematic P72 – I – MIT sounds very useful P72-3 – P – preliminary assessment stage P73 - Q - what system will be used to evaluate? Not a lot of detail here on what's entailed P73 – Q – unclear if they're intending to include benefits in the survey? We didn't ask for that P73 – P – including employers to whom State has lost employees – smart P74 – Q – concerned their definition of the comparator group is too small/narrow? P77-80 - Q - hard to understand the difference between some of these tasks, as well as the scopeP81 - N - assumes use of their job evaluation system, as opposed to making recommendations on what system should be used, strengths/weaknesses, etc P81 – Q – unclear what they mean by "job" - classification? Position? P82 – P – task 4.6 P82 – Q – up to 20 targets, is that enough? Public/private split? P87 - P - task 10.1, last bullet P89 – P – balance of priorities seems fairly good

RFP #: 201910183 RFP TITLE: Comprehensive Classification and Compensation Review Analysis and Recommendations BIDDER NAME: Evergreen Solutions LLC DATE: 12/11/19 EVALUATOR NAME: Holly Pomelow EVALUATOR DEPARTMENT: DAFS/BHR

Instructions: The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.

Individual Evaluator Comments:

National multi-disciplinary public sector consulting firm = P Extensive exp w/class and comp = P
Comprised of HR professionals and mgrs = P, Knowledge of relevant ME statutes = P No litigation = P
File 2 – consultant team of 9 – some IPMA and SHRM cert. = P
Org chart has a Maine employee at top for project Mgt = Q
Couldn't view the certificate of insurance = Q
Gave examples of completed work contracts = P, however, proposals did not delineate the sizes of the
projects, but all seemed to be smaller projects = N
Page 88 11.1 – Indicates they will assist in preparing new job descriptions = Q Only Assist?
Very little detail/plans for teleworking – only mentioned once and not mentioned in the final product = N
Proposes to complete by Aug 1, 2020 = P
File 4, 3.1 – Only 3 trips to the state during project? = Q, possibly N
\$455,550 – meets under the 600k amount

RFP #: 201910183 RFP TITLE: Comprehensive Classification and Compensation Review Analysis and Recommendations BIDDER NAME: Evergreen DATE: December 17, 2019 EVALUATOR NAME: Breena Bissell EVALUATOR DEPARTMENT: DAFS, BHR

Instructions: The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.

Individual Evaluator Comments:

Since 2004 (P & N)
Highlight local government experience (P & N)
Experience from both sides (P)
Facebook and LinkedIn presence noted (I)
Sample clients:
Boston Public Health Commission – Classification & Compensation study non-union (P & N & Q)
County of Montgomery, PA – compensation plan for non-represented classifications (P & N & Q)
Loudoun County, VA – classification and compensation (P & N & Q)
No subcontractors (P)
No litigation (P)
Financially viable tax records (Q)
Certificate of Insurance blank? (Q)
1:1 meetings; focus groups (I & P)
Evergreen Solution Job Assessment Tool© (I & P)
Management Issues Tool (I & P)
Compensation Administration Guidelines (Q)
Consideration of current bargaining unit agreements? (Q)
Telework piece? (N)

RFP #: 201910183 RFP TITLE: Comprehensive Classification and Compensation Review Analysis and Recommendations BIDDER NAME: Evergreen Solutions LLC DATE: 12/13/2019 EVALUATOR NAME: Heather L'Hommedieu Perreault EVALUATOR DEPARTMENT: DAFS Commissioner's Office

Instructions: The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.

Individual Evaluator Comments:

SECTION I: QUALIFICATIONS & EXPERIENCE

Established 2004

Negative – error in opening paragraph of cover letter – "understanding of the Texas labor market" Negative - Long list of clients provided – incl. Portland Public Schools – but experience appears limited to counties, municipalities, and other local governments

Positive – emphasis on communication and buy-in at all levels

Need more info – appear to base their analyses on a web-based tool "JobForce Manager", although they indicate that they offer clients alternatives so that we can choose the best solution for us Website – www.ConsultEvergreen.com

SECTION II: PROPOSED SERVICES

A: Current System Review / Methodology Recommendation

Services to include employee orientation sessions, focus groups, employee interviews Also one-on-one interviews with department heads and managers to org structure of each department and recruitment/retention challenges

Meet w Steering Committee within approx. four weeks to review initial findings and potential options

B: Classification Review / Update / Crosswalk

Need more info - Use of web-based Job Assessment Tool (JAT)

- is this customized to State or same for all clients?

- To be completed by employees with supervisor review function

Use of JAT to evaluate structure, movement, equity

Review of JATs to "identify any possible misclassifications"? job-by-by review? (p73, p81)

Revise current job descriptions based on JAT (p87)

C: Compensation Analysis / Comparison

Negative - Review to include "total compensation" specifically benefits (p73) – we specifically excluded Market survey to be designed after understanding of classifications obtained – will focus on public sector but will include employers to whom State has recently lost employees

Will select "benchmark positions" to have market survey recipients provide information on;

recommendations will be based on survey responses received

Identify highly competitive positions and customize recommendations

RFP #: 201910183 RFP TITLE: Comprehensive Classification and Compensation Review Analysis and Recommendations BIDDER NAME: Evergreen Solutions LLC DATE: 12/13/2019 EVALUATOR NAME: Heather L'Hommedieu Perreault EVALUATOR DEPARTMENT: DAFS Commissioner's Office

Identify extreme compensation inequities and provide recommendations provide recommendations re how to pay employees that have reached the top pay of their classification

Compensation administration guidelines will be provided for administering the system

Need more info - "JobForce Manager" is web-based tool used to administer the system – what does this provide that WorkDay won't be doing for us?

D: Telework Best Practices

Question to be included on market survey re practices and policies on teleworking

E: Deliverables

1. Reports

"Comprehensive Classification and Compensation Review, Analysis and Recommendations" draft and Final

2. explanation of data, rationale, timeframes, costs/savings, positive/negative consequences No provision for estimating cost differentials or consequences

3. Presentation to stakeholders, legislature

No discussion

4. Work with Steering Committee

SECTION III: COST

\$455k

OVERALL IMPRESSIONS

Negative - Proposal clearly shows their experience is primarily smaller employers – there doesn't seem to be an understanding of the complexity and scope of work for a large employer

Negative - Boilerplate "Proposed Services" section – several sections referred to things we specifically asked to be excluded, such as benefits and job-by-job classification review

Limited discussion re: review of job classification structure and establishment of new classifications or simplification to the structure (p82)

No discussion re process to evaluate jobs and assign them to appropriate classifications No reference to presentation to stakeholders or Legislature at end of project

RFP #: 201910183 RFP TITLE: Comprehensive Classification and Compensation Review, Analysis and Recommendations BIDDER NAME: Gallagher Benefit Services, Inc. DATE: 12/10/2019 EVALUATOR NAME: J. Thaddeus Cotnoir EVALUATOR DEPARTMENT: DAFS, BHR

Instructions: The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.

Individual Evaluator Comments:

FILE #2
More than double the time (15-18 months) = N
Qualifications Page 4, 1 st ¶ = P
Qualifications Page 4, Salary Database = P and I (own proprietary job eval method?)
Project 1 (page 5) = P
Project 2 (page 6) = Q
Project 3 (page 6) = Q; I
Personnel Qualifications (pages 7-11) = P
FILE #3
Page 6, 1 st ¶: "We do not ask participants to rate the quality of the match" = very P!
Page 9, last ¶: Q – approximately 600 description?
Page 14, timelines: Q/N – can they meet the required timeline?
File #4
Q
General:
P Included telework study

RFP #: <u>201910183</u> RFP TITLE: <u>Comprehensive Classification and Compensation Review Analysis and Recommendations</u> BIDDER NAME: Gallagher Benefit Services Inc. DATE: 12/13/2019 EVALUATOR NAME: Heather L'Hommedieu Perreault EVALUATOR DEPARTMENT: DAFS Commissioner's Office

Instructions: The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.

Individual Evaluator Comments:

SECTION I: QUALIFICATIONS & EXPERIENCE

Positive – HR division staff started w Ernst & Young, focused on public sector. Est 1981 – Public Sector HR Compensation & Consulting Practice – formerly Fox Lawson & Assoc, which was formerly Ernst & Young – purchased by Gallagher in 2009

Positive – strong focus on ethics

Positive - company experience correlates strongly with what we're trying to accomplish

Positive - ensure compliance with Fed regs e.g. FLSA, ADA & EEO

Positive - salary database w >300 public sector orgs info

Of interest – each member of Fox Lawson Assoc has IPMA certification, many teach thru WorldatWork; publish articles, see www.ajg.com/compensation

Admirable – stated up front that a fully in-depth project would take 15 – 18 months

References: Prince William County VA, State of CO, State of RI (14,000 positions) Positive – no subcontractors

Need more info - Litigation - see SEC reporting at www.ajg.com

Need more info – finances – see https://investor.ajg.com/financial-reports

SECTION II: PROPOSED SERVICES

A: Current System Review / Methodology Recommendation

Positive – philosophy: develop long term sustainable c/c system, understandable to all audiences Positive – planning meetings and communication built into process, stress importance of employee involvement throughout process, visible leadership support, of pay equity and compression issues,

recruitment and retention

Strong - Process – group interviews, select employee interviews, job evaluation questionnaires Job matching based on matching 80% of duties, responsibilities and functions of classification Define labor market prior to employee/job survey to avoid appearance of data manipulation Statistical analysis used to identify outliers and trends in data

B: Classification Review / Update / Crosswalk

Will develop draft job family structure for review with steering committee

Will develop structure that allows for future growth in positions

Develop classification descriptions

Select job evaluation method

Apply selected job evaluation system to all classifications

Train HR in use of new evaluation system, finalize job evaluation ratings with HR

NOTE: recommend ratings be reviewed by senior management to ensure accuracy – not included in expedited timeline

C: Compensation Analysis / Comparison

Benchmark jobs, ID hard to recruit positions and whether compensation is the issue

RFP #: 201910183

RFP TITLE: Comprehensive Classification and Compensation Review Analysis and

Recommendations

BIDDER NAME: Gallagher Benefit Services Inc.

DATE: 12/13/2019

EVALUATOR NAME: Heather L'Hommedieu Perreault

EVALUATOR DEPARTMENT: DAFS Commissioner's Office

Not requested - Employee benefits analysis

Competitive analysis & diagnostic review of salary structure to id opportunities for simplification, reduce pay compression

Transition options & next steps/costs

Reports: list of peer organizations, benchmark summary of comparison to market, salary structure and implementation cost analysis, pay equity compliance testing

D: Telework Best Practices

Weak? - Teleworking – Gallagher will provide research and recommendations, state responsible for implementation and training

Discuss what vision for teleworking is, communicate w OIT to determine current capabilities Research best practices for teleworking in public sector

If desired (not included in cost estimate?) work w state to develop teleworking policy

E: Deliverables

1. Reports

See above

Admin guidelines and policies for review by state

Communications plan

2. explanation of data, rationale, timeframes, costs/savings, positive/negative consequences

Included – appears to be very collaborative approach

Timeline – gave 7 month and recommended 15 month timelines

3. Presentation to stakeholders, legislature

Proposal includes multiple onsite meetings, development of communications for employee understanding & buy-in

Sample presentation included in proposal

4. Work with Steering Committee

Meet with steering committee & management to understand job culture & key issues; define objectives, project plan, and expectations

SECTION III: COST

\$599,700 - fixed cost?

Based on estimate of hours required – what if we go over the proposed hours in an area? Does not include writing new job descriptions @ \$350/description

OVERALL IMPRESSIONS

Strong project management

Collaborative approach, providing options for State to review and choose direction & methodology Strong focus on involvement and buy in of employees

**recommend communications staff member be included on steering committee

RFP #: 201910183 RFP TITLE: Comprehensive Classification and Compensation Review Analysis and Recommendations BIDDER NAME: Gallagher DATE: 12/17/19 EVALUATOR NAME: Tom Feeley EVALUATOR DEPARTMENT: MSEA-SEIU, Local 1989

Instructions: The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.

Individual Evaluator Comments:

Cost: \$599,700

Overview: I like Gallgher's relevant and recent experience, although I would like more information about their engagement with the State of Colorado. I share some of their concerns about the feasibility of completing the project in seven months. I'm not sure that they sufficiently addressed the first stage of the project, which is the recommendation regarding remaining within the same broad classification framework that we currently have or moving to an alternative system. Rather, they seem to jump right into the analysis of individual classifications.

RFP #: 201910183 RFP TITLE: Comprehensive Classification and Compensation Review Analysis and Recommendations BIDDER NAME: Gallagher DATE: 12/17/19 EVALUATOR NAME: Tom Feeley EVALUATOR DEPARTMENT: MSEA-SEIU, Local 1989

RFP #: <u>201910183</u> RFP TITLE: <u>Comprehensive Classification and Compensation Review Analysis and Recommendations</u> BIDDER NAME: Gallagher DATE: December 13, 2019 EVALUATOR NAME: Anne Macri EVALUATOR DEPARTMENT: Maine State Employees Association

Instructions: The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.

Individual Evaluator Comments:

1-2 - N - narrow scope due to timeframe - "minimal followup"

4 – P – salary database

(file 3)

8 - N - lots of things not included in the "expedited" process (interviews with key mgmt staff, interview guide)

9 – N – no PDQs, reviewing existing job descriptions, interviews of representative sample of employees

10-11 - N – details are thin in the work plan, not a lot of specificity as to tools used, scope, etc

12 – P – appeals process

RFP #: 201910183 RFP TITLE: Comprehensive Classification and Compensation Review Analysis and Recommendations BIDDER NAME: Gallagher Benefit Services, Inc. DATE: 12/9/19 EVALUATOR NAME: Holly Pomelow EVALUATOR DEPARTMENT: DAFS/BHR

Instructions: The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.

Individual Evaluator Comments:

Cover and presentation looks = P & I, Exp w/public sector orgs in ME = P

Past exp w/projects of similar size = P

Offered limited project scope due to time frame = N, States would take 15 to 18 months to conduct what we requested. They advise this would remove project depth, analysis and deliverables = N Page 5 file 2 – Current examples show lengthy processes and long, unfinished projects (1. in 2018, began a class and comp study with 4800 ees and 600 job classes – still in the classification stage today. 2. Page 6 – RI class and comp study 14k ees started in 2014 and is ongoing. No example of completed study = N

Bidder = 27k ees around the world, IPMA certified ees on the project team = P

Page 10 – Different people are listed in the bios than in the org chart for the project team (Deborah and Nicole) = Q

Page 12 – Litigation question indicated they were involved in court action proportionate for a corporation of their size and indicated it is confidential = Q

\$6B in revenue = P

File 3 – Nice cover/theme = I

Not much detail/plans for teleworking = N

File 4 – "Other Project Costs" indicates 0, however, appears they will charge \$350 per job description and \$350 for each appeal = Q and possible N

599k – meets under the 600k amount, however, does not perform the full scope = possibly N

RFP #: 201910183 RFP TITLE: Comprehensive Classification and Compensation Review Analysis and Recommendations BIDDER NAME: Gallagher DATE: December 16, 2019 EVALUATOR NAME: Breena Bissell EVALUATOR DEPARTMENT: DAFS, BHR

Instructions: The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.

Individual Evaluator Comments:

Bidder is realistic about the limitations with only 7-8 months to complete work (P & N)
Bidder identifies 15-18 months as a more realistic timeframe for work requested (P & N)
Recognition for being ethical (P)
Bidder indicates extensive experience – since 1981; 2009 Gallagher (P)
300 employer database to access market data (P)
IPMA-HR; NPELRA; World at Work course training relationships (P)
Other clients – limited info (N):
Prince William County, VA – 4,800 employees/600 classifications \$449,306 – similar work (P)
State of Colorado – health and retirement only – no number of employees provided (Q)
State of Rhode Island – 14,000 employees – ongoing since 2014 (Q)
The Decision Brand ® method of job evaluation (I & Q)
No subcontractors (P)
Insurance document submitted listed insurances beyond their expiration dates (N)
Litigation statement only (Q)
Employee benefits analysis (Q)

RFP #: 201910183 RFP TITLE: Comprehensive Classification and Compensation Review, Analysis and Recommendations BIDDER NAME: The Segal Company (Eastern States) Inc., d/b/a Segal Waters Consulting DATE: December 13, 2019 EVALUATOR NAME: J. Thaddeus Cotnoir EVALUATOR DEPARTMENT: DAFS, BHR

Instructions: The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.

Individual Evaluator Comments:

File 1:

P Claims similar projects for several other states and for Maine Judiciary P Claims good labor/management background and philosophy

? Project examples are rather small compared to this RFP

File 2:

P Staff resumes look good

File 3:

pp. 24-25: P Approach to communication Overall impressions: P Very detailed proposal

RFP #: 201910183 RFP TITLE: Comprehensive Classification and Compensation Review Analysis and Recommendations BIDDER NAME: Segal Waters Consulting. DATE: 12/13/2019 EVALUATOR NAME: Heather L'Hommedieu Perreault EVALUATOR DEPARTMENT: DAFS Commissioner's Office

Instructions: The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.

Individual Evaluator Comments:

SECTION I: QUALIFICATIONS & EXPERIENCE

Est 1939, employee owned, 24 offices, >1,000 employees

Started in benefits, designing health and retirement plans

Since 1997 has offered HR consulting to public sector and collective bargaining clients

Website <u>www.segalco.com</u>

Positive – work w clients in joint L/M environment to facilitate system changes

Clients – **SOM Judicial Branch**, MA Treasurer (192 employees), City of Boston (77 positions); also included several States on a separate list

No outstanding lawsuits

Sub-contractors?

SECTION II: PROPOSED SERVICES

A: Current System Review / Methodology Recommendation

Begin with One-on-one interviews w key stakeholders (5 days included)

Positive – focus on employee communication and customized communication plan, esp providing FAQs and regular updates on intranet or similar

B: Classification Review / Update / Crosswalk

Positive - Use of customized questionnaires and employee group interviews to evaluate and streamline the classification structure; Job Description Questionnaire addresses essential duties, skills and minimum requirements, fiscal responsibility, impact on public, etc

Positive – up to 5 days of employee presentations to introduce questionnaire, process, etc

Proprietary "Segal Evaluator" point-factor method of job evaluation - similar to Hay method?

Positive - Develop a recommended classification structure, to facilitate internal equity and external comparisons

review existing job evaluation approach – possibly to stay with Hay approach or use Segal Evaluator Negative – specifically excluded in RFP – assign individual positions to classifications & update job descriptions

Positive - market based, equity for similar duties and competencies, easily understandable by all

C: Compensation Analysis / Comparison

Market studies identify benchmark positions to include in surveys of identified employers

Positive – custom designed survey for peer public employers, use of published private sector pay data Provide implementation and multi-year analysis of increases/changes in costs

Negative – specifically excluded in RFP – fringe benefits analysis

RFP #: 201910183 RFP TITLE: Comprehensive Classification and Compensation Review Analysis and Recommendations BIDDER NAME: Segal Waters Consulting. DATE: 12/13/2019 EVALUATOR NAME: Heather L'Hommedieu Perreault EVALUATOR DEPARTMENT: DAFS Commissioner's Office

Positive – will recommend pay policies eg how pay increases within classification, salary schedule adjustments, new-hire pay, how to use supplements, stipends, etc

Positive - will estimate annual cost of implementation

Positive – will work with State to develop implementation schedule based on priorities, culture & availability of funding

D: Telework Best Practices

Recommendations for best practices

E: Deliverables

1. Reports

Summary tables of market data

Market survey report: exec summary, objectives & methodology, position analysis, current trends Final report/presentation to Steering Committee, Legislature

2. explanation of data, rationale, timeframes, costs/savings, positive/negative consequences Included in reporting

3. Presentation to stakeholders, legislature

Will provide talking points and summary presentations to key stakeholders May include participation in Legislative hearings and/or work sessions in 2021

4. Work with Steering Committee

Initial on-site meeting, establish protocols for updates, clarify Segal & State's roles in project Work w Steering Committee to clarify market study methodology Several other references to collaboration

SECTION III: COST

\$565k fixed fee

OVERALL IMPRESSIONS

Client references were all small organizations, although States were referenced elsewhere Positive - Significant collaboration with Steering Committee

Negative – proposal includes some things specifically excluded by RFP (benefits, assigning positions to classifications)

Positive – seems to have good understanding of public sector environment

RFP #: 201910183 RFP TITLE: Comprehensive Classification and Compensation Review Analysis and Recommendations BIDDER NAME: Segal DATE: 12/17/19 EVALUATOR NAME: Tom Feeley EVALUATOR DEPARTMENT: MSEA-SEIU Local 1989

Instructions: The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.

Individual Evaluator Comments:

Cost: \$565,000

Overview: I am impressed with Segal's relevant experience, including numerous studies at the state level, as well as their proprietary system and experience working with both management and unions. The level of detail of their proposal reflects a deep understanding of the issues, including the sensitivities of the relevant interest groups and a practical understanding of implementation.

RFP #: <u>201910183</u> RFP TITLE: <u>Comprehensive Classification and Compensation Review Analysis and Recommendations</u> BIDDER NAME: Segal DATE: December 13, 2019 EVALUATOR NAME: Anne Macri EVALUATOR DEPARTMENT: Maine State Employees Association

Instructions: The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.

Individual Evaluator Comments:

P4 – P – lots of state/public sector work, Maine experience (JB), VT, NH, MA, RI, exp with union environments P8 - P - total compensation market studies sounds like what we're looking for P8 – Q – would like to see some examples of the Segal Evaluator tool P8 – P – multi-year cost modeling P10-11 - Q - none seem to involve reviewing the overall system P24 – Q – not sure this order makes the most sense P24 - Q - stakeholder interviews - why confidential? P24-25 – N – does not seem to propose a thorough review of the current system or identifying/evaluating alternative systems P26 – Q – would this involve every job? Every class? Benchmarks? P26 - Q - presentations - where? Regional? Accessibility? P28 – N – not actually comparing other systems P28 – N – SF does not include market data as a factor in evaluation P28 - Q - how would this get us away from all the problems we have with Hay? P28 – N – no appeals process envisioned P29 – N – envisions that structure and assignments will be approved during this process – nothing re comparison to other comparable employers' systems, strengths/weaknesses, etc P29-30 – P – mostly looks good P30 – N – limited to 12 public entities – not a lot to compare to P31-34 – P – format looks good P35 – N – no comparisons to data re developing recommended salary schedules P36 – N – nothing dealing with the existing stipends P38-41 - N - overall balance is heavily weighted to the classification review on the job level, asopposed to the data gathering, comparison and recommendations on the system level

RFP #: 201910183 RFP TITLE: Comprehensive Classification and Compensation Review Analysis and Recommendations BIDDER NAME: Segal DATE: 12/11/19 EVALUATOR NAME: Holly Pomelow EVALUATOR DEPARTMENT: DAFS/BHR

Instructions: The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.

Individual Evaluator Comments:

Has conducted similar projects for other states and Maine Judiciary = P Extensive exp w/class and comp and contract bargaining = P Comprised of HR consultants and compensation = P, 1000 ees in 24 offices in US and Canada = P Extensive experience in results driven consulting = P No litigation and many clients = P File 2 – consultant team of 7 – some SPHR cert and comp professionals. = P Gave examples of completed work contracts = P, competed ME judicial in 2016 with 75 job titles, Mass 192 ees in 2016 – 2017, and Boston division of 77 cabinet level positions 2017 - 2018 = P. Projects all seemed to be smaller projects = NIncluded an understanding of proposal and included what we requested, = P Methodology described = PIncludes meeting with stakeholders including unions = P Indicates plans to meet with employees – all of them? = Q - 5 days of on-site presentations for all employees who want to attend – all of them? = Q Will they include electronic attendance in this? = Q Will provide updated job descriptions and develop cross walks from former to new jobs. = P File 3 page 29 – provides duties for steering committee that seem more aligned with the class and comp ees (collecting JDQ's from managers, sorting them and sending them to Segal, reserving meeting rooms, etc.) = QFile 3, page 35 step 4 seems to meet our needs = P \$565k - meets under the 600k amount Consolidated Statements of Stockholders Equity (deficit) Dec 2018 shows a \$42M deficit = Q

RFP #: 201910183 RFP TITLE: Comprehensive Classification and Compensation Review Analysis and Recommendations BIDDER NAME: Segal Waters DATE: December 16, 2019 EVALUATOR NAME: Breena Bissell EVALUATOR DEPARTMENT: DAFS, BHR

Instructions: The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.

Individual Evaluator Comments:

Since 1939; 2014 added public sector (P & N)
Long lists of clients (P)
Labor/Management work (P)
Sample clients:
Judicial Branch, ME – 2016 Compensation market survey (P & N)
Commonwealth of MA – 192 employees (P & N)
City of Boston – 77 cabinet level employees (P & N)
Segal Evaluator™ (I & Q)
No subcontractors (P)
No litigation (P)
Financially viable according to statement (P)
No records supplied – only statement (N)
'Sample' insurance statement (Q)
Employee benefits analysis (Q)
1:1 with key stakeholders; 5 consecutive days (I & P)
Employee presentations; 5 consecutive days (I & P)
Use of video conference as alternative to onsite employee interviews (P)
Sample with years of experience proposed as minimum qualifications (Q)
Expectations of the State clarified for steps (P)



JANET T. MILLS Governor KIRSTEN LC FIGUEROA Commissioner

AGREEMENT AND DISCLOSURE STATEMENT RFP#: 201910183 RFP TITLE: <u>Comprehensive Classification and Compensation Review,</u> <u>Analysis and Recommendations</u>

I, <u>Anne Macn</u> accept the offer to become a member of the Request for Proposals (RFP) Evaluation Team for the State of Maine Department of Administrative and Financial Services. I do hereby accept the terms set forth in this agreement AND hereby disclose any affiliation or relationship I may have in connection with a bidder who has submitted a proposal to this RFP.

Neither I nor any member of my immediate family have a personal or financial interest, direct or indirect, in the bidders whose proposals I will be reviewing. "Interest" may include, but is not limited to: current or former ownership in the bidder's company; current or former Board membership; current or former employment with the bidder; current or former personal contractual relationship with the bidder (example: paid consultant); and/or current or former relationship to a bidder's official which could reasonably be construed to constitute a conflict of interest (personal relationships may be perceived by the public as a potential conflict of interest).

I have not advised, consulted with or assisted any bidder in the preparation of any proposal submitted in response to this RFP nor have I submitted a letter of support or similar endorsement.

I understand that the evaluation process is to be conducted in an impartial manner. In this regard, I hereby certify that, to the best of my knowledge, there are no circumstances that would reasonably support a good faith charge of bias. I further understand that in the event a good faith charge of bias is made, it will rest with me to decide whether I should be disqualified from participation in the evaluation process.

I agree to hold confidential all information related to the contents of Requests for Proposals presented during the review process until such time as the Department formally releases the funding decision notices for public distribution.

12/5/19

Signature

Date



JANET T. MILLS Governor KIRSTEN LC FIGUEROA Commissioner

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I, <u>Breena D. Bissell</u> accept the offer to become a member of the Request for Proposals (RFP) Evaluation Team for the State of Maine Department of Administrative and Financial Services. I do hereby accept the terms set forth in this agreement AND hereby disclose any affiliation or relationship I may have in connection with a bidder who has submitted a proposal to this RFP.

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Signature

Rev. 7/15/2019



JANET T. MILLS Governor KIRSTEN LC FIGUEROA Commissioner

AGREEMENT AND DISCLOSURE STATEMENT RFP#: 201910183 RFP TITLE: <u>Comprehensive Classification and Compensation Review,</u> <u>Analysis and Recommendations</u>

I, <u>Heather L'Hommedieu Perreault</u> accept the offer to become a member of the Request for Proposals (RFP) Evaluation Team for the State of Maine Department of Administrative and Financial Services. I do hereby accept the terms set forth in this agreement AND hereby disclose any affiliation or relationship I may have in connection with a bidder who has submitted a proposal to this RFP.

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I, <u>Holly Pomelow</u> accept the offer to become a member of the Request for Proposals (RFP) Evaluation Team for the State of Maine Department of Administrative and Financial Services. I do hereby accept the terms set forth in this agreement AND hereby disclose any affiliation or relationship I may have in connection with a bidder who has submitted a proposal to this RFP.

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Signature

Date



JANET T. MILLS Governor

KIRSTEN LC FIGUEROA Commissioner

AGREEMENT AND DISCLOSURE STATEMENT RFP#: 201910183 RFP TITLE: <u>Comprehensive Classification and Compensation Review,</u> <u>Analysis and Recommendations</u>

, J. Thaddees Cotnoir

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Signature Date