

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
RFP / Proposal Master Score Sheet

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 SUBMITTED BY:		Evergreen Solutions, LLC		Gallagher Benefit Services, Inc.		Segal 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 (Cost was evaluated using consensus method)	25	8		10		15	
TOTAL	<u>100</u>	<u>32</u>		<u>57</u>		<u>74</u>	



**STATE OF MAINE
DEPARTMENT OF ADMINISTRATIVE & FINANCIAL SERVICES**

**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.



**STATE OF MAINE
DEPARTMENT OF ADMINISTRATIVE & FINANCIAL SERVICES**

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Commissioner**

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

Sincerely,

A handwritten signature in black ink, appearing to read "H. Perreault", written over a large, loopy flourish.

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



**STATE OF MAINE
DEPARTMENT OF ADMINISTRATIVE & FINANCIAL SERVICES**

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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).



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DEPARTMENT OF ADMINISTRATIVE & FINANCIAL SERVICES

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



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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:

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DEPARTMENT OF ADMINISTRATIVE & FINANCIAL SERVICES**

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



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**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

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

		<u>Points Awarded:</u>
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

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

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

Score: 12

Evaluation Team Comments:

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.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

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

Score: 12

Evaluation Team Comments:

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

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

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

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

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.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

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

		<u>Points Awarded:</u>
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

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

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

Score: 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.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

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 Points Available: 40

Score: 27

Evaluation 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.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

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.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

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**

Total Points Available: 25

Score: 10

Evaluation Team Comments:

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

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 201910183

RFP TITLE: Comprehensive Classification and Compensation Review, Analysis and Recommendations

BIDDER: Segal Waters Consulting

DATE: 12/19/2019

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SUMMARY PAGE

		<u>Points Awarded:</u>
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

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

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

Score: 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.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

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

Score: 31

Evaluation Team Comments:

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 on-site 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

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

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

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

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

Evaluation Team Comments:

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"

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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

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

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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 www.segalco.com
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

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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



STATE OF MAINE
DEPARTMENT OF ADMINISTRATION AND
FINANCIAL SERVICES

JANET T. MILLS
Governor

KIRSTEN LC FIGUEROA
Commissioner

AGREEMENT AND DISCLOSURE STATEMENT
RFP#: 201910183

RFP TITLE: Comprehensive Classification and Compensation Review,
Analysis and Recommendations

I, Anne Macii 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.

Signature

12/5/19
Date



STATE OF MAINE
DEPARTMENT OF ADMINISTRATION AND
FINANCIAL SERVICES

JANET T. MILLS
Governor

KIRSTEN LC FIGUEROA
Commissioner

AGREEMENT AND DISCLOSURE STATEMENT
RFP#: 201910183

RFP TITLE: Comprehensive Classification and Compensation Review,
Analysis and Recommendations

I, Breana D. Bissell 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).

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Breana D. Bissell 12/5/2019
Signature Date



STATE OF MAINE
DEPARTMENT OF ADMINISTRATION AND
FINANCIAL SERVICES

JANET T. MILLS
Governor

KIRSTEN LC FIGUEROA
Commissioner

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

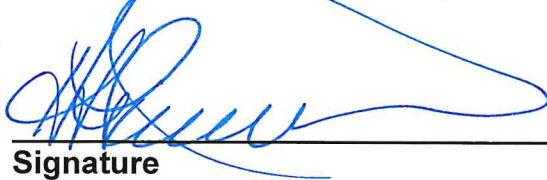
I, Heather L'Hommedieu Perreault accept the offer to become a member of the Request for Proposals (RFP) Evaluation Team for the State of Maine Department of Administrative and Financial Services. I do hereby accept the terms set forth in this agreement AND hereby disclose any affiliation or relationship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

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Signature

12/6/19
Date



STATE OF MAINE
DEPARTMENT OF ADMINISTRATION AND
FINANCIAL SERVICES

JANET T. MILLS
Governor

KIRSTEN LC FIGUEROA
Commissioner

AGREEMENT AND DISCLOSURE STATEMENT
RFP#: 201910183

RFP TITLE: Comprehensive Classification and Compensation Review,
Analysis and Recommendations

I, Holly Pomelow 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 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.

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Holly Pomelow
Signature

12/5/19
Date



STATE OF MAINE
DEPARTMENT OF ADMINISTRATION AND
FINANCIAL SERVICES

JANET T. MILLS
Governor

KIRSTEN LC FIGUEROA
Commissioner

AGREEMENT AND DISCLOSURE STATEMENT
RFP#: 201910183

RFP TITLE: Comprehensive Classification and Compensation Review,
Analysis and Recommendations

I, J. Thaddeus Cotnoir 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 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.

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J. Thaddeus Cotnoir
Signature

12/5/19
Date



STATE OF MAINE
DEPARTMENT OF ADMINISTRATION AND
FINANCIAL SERVICES

JANET T. MILLS
Governor

KIRSTEN LC FIGUEROA
Commissioner

AGREEMENT AND DISCLOSURE STATEMENT

RFP#: 201910183

**RFP TITLE: Comprehensive Classification and Compensation Review,
Analysis and Recommendations**

I, Thomas M. Feeley 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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