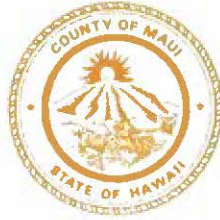


RICHARD T. BISSEN, JR.
Mayor

CYNTHIA M. RAZO-PORTER
Director

KAINEA K.G. AIWOHI-ALO
Deputy Director



DEPARTMENT OF PERSONNEL SERVICES
COUNTY OF MAUI
200 SOUTH HIGH STREET
WAILUKU, MAUI, HAWAII 96793
PHONE (808) 270-7850 * FAX (808) 270-7969

Website: www.mauicounty.gov/departments/Personnel • Email: personnel.services@mauicounty.gov

September 23, 2024

Honorable Richard T. Bissen, Jr.
Mayor, County of Maui
200 South High Street
Wailuku, Hawaii 96793

APPROVED FOR TRANSMITTAL

Richard T. Bissen, Jr. 9-25-24

Mayor Date

For Transmittal to:
Honorable Yuki Lei Sugimura
Chair, Budget, Finance and Economic Development Committee
200 South High Street
Wailuku, Hawaii 96793

Dear Honorable Yuki Lei Sugimura:

SUBJECT: BILL 124 (2024), AMENDING THE FISCAL YEAR 2025 BUDGET; ESTIMATED REVENUES; DEPARTMENT OF MANAGEMENT (MANAGEMENT PROGRAM); AND CAPITAL IMPROVEMENT PROJECTS, DEPARTMENT OF MANAGEMENT (WAILUKU-KAHULUI COMMUNITY PLAN AREA, FITNESS COURTS) (BFED-100)

We are in receipt of your communication (BFED-100) which requests a copy of the Request for Proposals (RFP) relating to the salary study.

Request 1. Provide the scope of work and timeline for the salary study. Further, provide a copy of the RFP and of the winning proposal.

Answer: Per your request, attached is a copy of the Request for Proposals (RFP) 23-24/P-196, Consultant to Perform Salary Analysis and Comparison Study and the winning bid/proposal from MGT Impact Solutions (previously named MGT of America Consulting).

- The Scope of Work is outlined in the RFP beginning on page 8.
- As illustrated in Exhibit I (page 16) MGT Impact Solutions proposes a 16-week timeline for the Salary Study from project initiation to final report to the County. The proposal notes they are available to start the project within four to six weeks of acceptance of the proposal.

Honorable Chair Sugimura
September 23, 2024
Page 2

Request 2. The bid results, including an explanation of how the selected vendor was chosen.

Answer: The evaluation criteria used includes relevant experience and qualifications (45 points), proposed methodology of performance, project approach and reliability (35 points), cost (15 points) and past performance (5 points). Additional explanation of the criteria can be found on page 14 of the RFP.

I hope this addresses your request. If you have any questions, please feel free to contact me at extension 7850.

Sincerely,



CYNTHIA M. RAZO-PORTER
Director of Personnel Services

CMR
Attachments

COUNTY OF MAUI
RFP 23-24/P-196
Salary Analysis and Comparison Study

FINAL SCORING SHEET		Points Awarded				
Evaluation Criteria* (See tab for further descriptions)	Reviewer	Relevant Experience and Qualifications	Proposed Method of Performance, Project Approach and Reliability	Cost	Past Performance	TOTAL
Points Possible		45	35	15	5	100
Vendor						
Accuity LLP	CN	10	10	6	5	31
	NJ	34	25	6	1	66
	SM	30	20	6	4	60
						0
						157
Gallagher Benefit Services, Inc	CN	25	25	9	5	64
	NJ	42	29	9	5	85
	SM	40	30	9	5	84
						0
						233
McGrath Consulting, Inc	CN	43	33	13	5	94
	NJ	33	31	13	4	81
	SM	40	32	13	5	90
						0
						265
MGT of America Consulting, LLC	CN	44	34	15	5	98
	NJ	38	31	15	3	87
	SM	40	34	15	5	94
						0
						279

Proposal

JULY, 19, 2024

RFP #23-24/P-196



Consultant to Perform Salary Analysis and Comparison Study

**County Of Maui,
Hawaii**

Submitted by:

RACHEL SKAGGS

PROJECT MANAGER

790 FRONTAGE ROAD, SUITE 213

NORTHFIELD, IL 60093

815-303-2187

rskaggs@govhrusa.com

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Transmittal Letter



July 19, 2024

Jared Masuda, Central Purchasing Agent
Department of Finance, Purchasing Division
County Of Maui
2145 Wells Street, Suite 104
Wailuku, HI 96793

RE: RESPONSE TO RFP #23-24/P-196 CONSULTANT TO PERFORM SALARY ANALYSIS AND COMPARISON STUDY

Dear Mr. Masuda:

MGT of America Consulting, LLC (MGT) is pleased to present this response to your recent Request for Proposal (RFP) for a Consultant to Perform Salary Analysis and Comparison Study for the County of Maui (“County”). MGT’s response provides the County with related firm qualifications, key experience, a detailed work plan with timeline, and associated fees to provide services that exceed expectations. We are experts in classification and compensation studies and know we would be a perfect fit for the County.

We understand human resources (HR) management continues to be a significant concern as governmental services continue to increase in cost and complexity, and the resources to fund local governments are constrained. Day-to-day operations present challenging administrative problems in planning, organizing, and directing human resource functions to achieve maximum efficiency and effectiveness in the delivery of municipal services. A properly developed and administered compensation plan forms the foundation for meeting these challenges. It helps to ensure the County can recruit and retain the best and brightest employees, even in a competitive marketplace. We understand the high expectations that have been established in the County in recruiting and retaining excellent employees. These factors will be taken into consideration in the analysis and reflected in the Study results.

GovHR USA (GovHR), *a recent addition to MGT*, provides comprehensive executive recruitment, interim staffing, HR consulting, and organizational analysis consulting services for local governments, intergovernmental organizations, and school districts, as well as other governmental and non-profit entities. GovHR consultants have worked in all areas of local government leadership including city/county management, human resources, public safety, finance, public works, parks and recreation, and utilities. This combined hands-on knowledge and experience has made GovHR a proven leader in public sector consulting.

MGT CONTACT INFORMATION

MGT HEADQUARTERS

MGT of America Consulting, LLC

4320 West Kennedy Boulevard | Tampa, Florida 33609
P: 813.327.4717 | www.mgtconsulting.com
FEIN: 81-0890071

TRANSMITTAL LETTER

PROPOSAL CONTACT

Rachel Skaggs, Classification and Compensation Project Manager
790 Frontage Road, Suite 213 | Northfield, IL 60093
P: 815-303-2187 | E: rskaggs@GovHRusa.com

Thank you for the opportunity to submit a proposal to the County of Maui. Should you have questions on any aspect of this proposal, please contact **Rachel Skaggs** at **815-303-2187** or **rskaggs@GovHRusa.com**.

Regards,



Patrick J. Dyer, Vice President
Authorized to bind the firm



Offeror's Profile

We impact the communities we serve – for good.

MGT began operations in 1974 as a public-sector research firm. Since then, we have significantly expanded our consulting capabilities and client offerings. Today, we are a national consulting firm specializing in **assisting clients to operate more efficiently and effectively.**

MGT has acquired a keen understanding of the structures, operations, and issues facing public agencies. This understanding comes from **nearly 50 years** of experience providing innovative yet practical solutions to public sector clients. We provide objective, creative, expert services in the areas of human capital, finance, technology, programming, and planning. We draw on the expertise of our highly qualified staff, most of whom have had prior careers at city-, county-, and state-level government offices. This insider's knowledge of government operations and structure gives MGT a competitive advantage and an ability to hit the ground running from the very start of a project.

MGT has successfully worked with clients on **more than 30,000 projects** to help them adapt to change while maintaining the vision and direction toward their short- and long-term goals. Our firm includes **more than 800 professionals and administrative staff** to support our clients' success.

Our Commitment

MGT embraces the most complex challenges with deep commitment, agility, and local expertise to make a measurable and profound social impact. Simply stated, our promise is:

We improve lives by advancing and lifting up your community.

This purpose reflects the company's strong social conscience and service ethic that forms the core of the MGT "Why." MGT models this philosophy by systematically seeking out the highest-impact projects and relationships, encouraging community involvement, and investing in a collaborative and rewarding world-class work environment for employees.

Part of our success is based on our **promise to be flexible and responsive.** We are acutely aware of the political, economic, social, and technological factors that impact today's public sector clients. MGT is structured into several primary consulting divisions to support these needs. **We are pleased to have the Government Consulting Experts within the MGT Performance Solutions Group responsible for leading the completion of this project.**



Name: MGT of America Consulting, LLC (MGT)
Founded: 1974
Locations: Headquarters in Tampa, Florida; branch offices nationwide
Staff: 800+ consultants across the country
Structure: Privately held and client-driven
Cooperative Contracts:
 Allied States Cooperative (ASC) #23-7449, #24-7484
 The Interlocal Purchasing System (TIPS) #220601
Lines of Business: Government Consulting; Education and Financial Solutions; Diversity and Inclusion; Human Capital; Cybersecurity and Technology

Performance Solutions

The MGT Performance Solutions team has an impressive track record of providing **customized solutions, objective research, creative recommendations, and quality products** that respond to each client's unique needs and time requirements.

GovHR USA

GovHR was originally formed as Voorhees Associates in 2009, changed its name to GovHR USA in 2013, and joined MGT (**the nation's leading social impact firm**) in 2023. GovHR provides public management consulting services to local government clients and other public-sector entities across the country. GovHR offers customized executive recruitment services, management studies, and consulting projects for local government and organizations that work with local government. Additionally, GovHR's GovTempsUSA division provides interim staffing solutions to keep operations moving during the recruitment process.

GovHR's consultants have conducted more than **270 classification and compensation studies in the past 10 years**, working with cities, counties, special districts, and other governmental entities of all sizes throughout the country. They have held leadership positions within local government, giving them an understanding of the complexities and challenges facing today's public sector leaders.

GOVHR'S LEADERSHIP



Heidi Voorhees
(847) 380-3240

HVoorhees@GovHRusa.com

Ms. Voorhees has conducted more than 400 recruitments in her management consulting career, with many of her clients being repeat clients, attesting to the high quality of work performed for them. In addition to her 22 years of executive recruitment and management consulting experience, Ms. Voorhees has 19 years of local government leadership and management service, including 10 years as Village Manager for the Village of Wilmette, Illinois.



Joellen Cademartori
(847) 380-3238

JCademartori@GovHRusa.com

Ms. Cademartori is a seasoned manager with expertise in public-sector human resources management. She has held positions from Human Resources Director and Administrative Services Director to Assistant Town Manager and Assistant County Manager. Ms. Cademartori has worked in forms of government ranging from Open Town Meetings to Council-Manager and has supervised all municipal and county departments ranging from Public Safety and Public Works to Mental Health and Social Services.

The Social Impact of MGT's Work

*Impacting
Communities.
For Good.*



Defined by Our Impact

Our understanding of Maui's unique labor market and the County's goals for a fair, equitable, and market-competitive compensation system positions MGT perfectly to deliver a successful project. The MGT team thrives on empowering organizations like the County to optimize their human capital strategies.

Leveraging innovations in people analytics, data-driven processes, and cutting-edge technology, we will conduct a comprehensive compensation study that delivers actionable insights. ***This will ensure that Maui County attracts and retains top talent by offering competitive compensation packages that are fair and equitable for employees.***

MGT's Primary Consulting Divisions

Our firm includes **more than 800 professionals and administrative staff** to support our clients' success. MGT is structured into the following primary consulting divisions, along with various internal infrastructure groups, to support our operations and growth.



Performance Solutions

Our Performance Solutions team provides world-class financial, human capital, and equity solutions which enable clients to fully realize the potential of their most valuable resources. Our team excels at fiscal management and operational efficiency assessments that help clients make data-driven decisions, anticipate workforce issues, and integrate technologies to empower our clients to generate critical income and elevate enterprise performance objectives.



Education Solutions

Our Education Solutions originate in our commitment to ensuring that every student has access to a high-quality education as they discover and realize their profound potential.

From pre-K-12 to higher education, we partner with schools, districts, state agencies, and colleges and universities to deliver performance improvement and innovation, and transformation planning and implementation.



Technology Solutions

Our Technology Solutions business supports state, local, education, and private companies as they seek to improve and protect their network infrastructure and data for greater resiliency. We offer world-class IT infrastructure management, cyber security, and strategic IT professional staffing. Our deep engineering expertise is foundational to all MGT's technology solutions.



Experience & Qualifications

Incomparable Classification and Compensation Consulting Expertise.

We are proud to offer the exceptional expertise of our team members and our understanding and knowledge of the County of Maui’s scope based on years of relevant experience. We bring the breadth and depth of knowledge and expertise to identify real, practical solutions that meet our clients’ needs. Part of our success is our commitment to being flexible and responsive. We are acutely aware of the political, economic, social, and technological environments of today’s public sector environment.



MGT: EXPERTS IN COMPENSATION

“What I liked most about working with MGT staff is their creative approach in providing solutions to each project. The County has implemented MGT’s recommendations...”

MGT has conducted numerous compensation, classification, and human resources studies for clients nationwide. MGT’s GovHR has conducted **over 270 classification and compensation studies in the past 10 years.** Our Human Capital practice is dedicated to helping our clients find the procedures and people they need to deliver quality service to their constituents. An equitable, competitive, and compelling compensation structure is key to reaching that goal. As the County pursues an update of its compensation system, assuring a fair, competitive, and attractive compensation package to its employees will go far towards assuring continued quality in the provision of County services.

Hawaii-Specific Experience

UNIVERSITY OF HAWAII SYSTEM-EXECUTIVE COMPENSATION STUDY

The University of Hawaii System contracted with MGT to conduct an Executive/Managerial Compensation Review for the University System. The review included an assessment of current policies and procedures, an assessment of best practices, a review of survey tools, and an assessment, comparison, and cost analysis of the value of university benefits. MGT recommended methods and practices to fairly compensate executive and managerial personnel in public sector higher education and competitive employee benefits not currently offered, including a potential cost to the university.

UNIVERSITY OF HAWAII AND THE HAWAII STATE LEGISLATURE-CONSULTANCY WITH THE TASK FORCE TO RECOMMEND A FUNDING APPROACH

The University of Hawaii Act 186 Task Force engaged MGT to develop a budgetary system that includes an equitable, consistent, and responsive funding formula for the distribution of fiscal resources to the various University of Hawaii campuses. MGT evaluated the adequacy of current funding as one component of the study and made recommendations for adjustments to the campus-based budgets. MGT briefed the Legislature on the funding mechanism and assisted the Task Force in analyzing components of the financial plan to achieve the strategic goals and long-term funding targets for each institution within the University of Hawaii system, including performance indicators.

Relevant Experience

Below is a short list of additional completed studies similar in size and scope to the County of Maui. A complete list of our Classification and Compensation Study clients is on our website at www.govhrusa.com.

State	Client	Title	Population	Year
Wisconsin	Dane County Cities and Villages Association	Multi-Community Wage Study	561,500	2020
Illinois	McHenry County Conservation District	Classification & Compensation Study	318,000	2023
Ohio	Toledo	Compensation Study	272,780	2022
Iowa	Scott County	Compensation Study	172,943	2020
Connecticut	Capitol Region Council of Governments	Classification & Compensation Study	Multi-District	2022
Illinois	Cary Park District	Classification & Compensation Study	Multi-District	2023
Illinois	Fox River Water Reclamation District	Compensation Study	Multi-District	2023
Illinois	Northern Suburban Special Recreation Association	Compensation Study	Multi-District	2022
Illinois	Oswegoland Park District	Classification & Compensation Study	Multi-District	2023
Illinois	St. Charles Park District	Salary Survey	Multi-District	2022
Illinois	Wilmette Park District	Classification & Compensation Study	Multi-District	2022
Iowa	Aging Resources of Central Iowa	Compensation Study	Multi-District	2023
Kansas	Lawrence-Douglas County Housing Authority	Compensation Study	Multi-District	2023
Massachusetts	Lynn Public Schools	Classification & Compensation Study	Multi-District	2023
Massachusetts	North Andover Public Schools	Compensation Study	Multi-District	2023
Michigan	Coldwater Board of Public Utilities	Classification & Compensation Study	Multi-District	2023
Michigan	Community Economic Development Association of Michigan	Compensation Study	Multi-District	2022
Minnesota	Northeastern Minnesotans for Wilderness – Save the Boundary	Compensation Study	Multi-District	2021
Illinois	DeKalb County Health Department	Compensation and Benefits Study	100,420	2023
Michigan	Clinton & Montcalm County Road Commission	Compensation Study	116,000	2024

Why is MGT the Most Qualified to Conduct the County's Study?

- ✓ **Experience.** MGT has the experience and certifications that HR departments need. MGT staff are certified as Senior Human Resources Management Certified Professionals (SHRM-CP), Project Management Professionals (PMP), and Change Management Professionals (CCMP). Additionally, MGT has conducted numerous human capital studies nationwide, such as HR audits, compensation and classification studies, staffing reviews, performance system updates, and organizational reviews. Furthermore, many of our clients are repeat clients, attesting to our acumen for local government human resources consulting services and our desire to work with each public sector client to create a lasting bond that ensures their success over time.
- ✓ **Best Practices Comparisons.** MGT offers the County our extensive experience to identify exemplary management practices — reflective of the County's input and that of comparable localities. This experience gives us not only a ready reference point for reviewing the County's compensation system, but also provides us with practices that have been proven successful in other similar organizations. This knowledge is of significant value when we design recommendations for improvements.
- ✓ **Sound Findings and Data-Driven Recommendations.** In our experience, most major improvements in local government operations require bold thinking. In helping the County reconcile its pay system with its evolution and workforce changes, our team members will not hesitate to question existing organizational structures, programs, policies, rules, statutes, operations, work processes, and staffing patterns. We will make sound recommendations for improvements that produce real — *not just on paper* — savings, and ease of future pay administration for the County.
- ✓ **Assistance in the Implementation of Recommendations.** We will not simply leave the County with a report and a plethora of recommendations. We will create detailed implementation strategies to support the County with initial implementation and best practice guidance for maintaining and sustaining an equitable compensation study and classification system over the long term.
- ✓ **Objectivity and Flexibility.** As an independent entity, our only vested interest is that of the client. Therefore, we will apply our extensive experience to generating objective independent solutions to assist the County to achieve the best outcomes. In addition, we will be receptive to your insights and concerns and will accommodate any changes necessary to ensure the successful completion of project deliverables, a valid and responsive final report, and, more importantly, an implementable and flexible compensation system relevant to the County's current realities and beyond.



Key Personnel

The success of a consulting engagement is founded on the qualifications of the project team and the way in which it is structured and managed.

Our work with clients is characterized by the belief that we can only be successful if our clients develop the knowledge, capacity, and mechanisms to help themselves. To that end, all our services:

- ◆ Build on our clients’ existing strengths and resources while empowering them to address present challenges.
- ◆ Assist our clients in learning about widely recognized best practices and emerging research.
- ◆ Encourage our clients to develop the habit of identifying, collecting, and acting on essential, current, and relevant data.
- ◆ Help our clients maximize the efficiency and effectiveness of their human and fiscal resources.
- ◆ Provide pragmatic and affordable solutions that will be deliverable and sustainable over the long term.

The proposed management structure for this project has been designed to define the roles and responsibilities of each team member assigned to this project and to facilitate project management. The strength and experience of our team will allow for efficient and effective project management and results. Each team member has a wide range of project experience working with clients similar to the County of Maui. The team we have designated is highly experienced with this type of engagement and, therefore, requires little orientation time. Biographies of each team member listed below are provided in **Appendix A**.

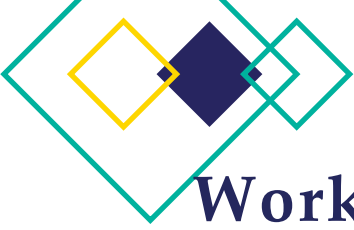
Project Staff Roles and Responsibilities

Specific hours and assignments for each role are outlined in the Price Proposal.

ROLE ASSIGNED	RESPONSIBILITIES
COUNTY OF MAUI REPRESENTATIVE	We look forward to working with the County Representative to build a long-lasting and trustworthy partnership that produces innovative solutions.
PROJECT MANAGER* <i>Rachel Skaggs Katy Yee Rachel King</i>	The Project Manager holds the following responsibilities: <ul style="list-style-type: none"> ▪ Main point of contact for the County. ▪ Day-to-day management of the project, tasks, and deliverables. ▪ Oversight over service and deliverable quality. ▪ Management of all project deadlines. ▪ Maintains frequent contact with the County Representative throughout the lifecycle of the project.
SPECIALIST/CONSULTANT TEAM** <i>Alice Bieszczat Julie Hawkins</i>	The Consultant Team holds the following responsibilities: <ul style="list-style-type: none"> ▪ Work closely with the County under the direction of the Project Manager to carry out the various tasks and deliverables. ▪ Utilize individual subject matter expertise to customize and execute each work task and fulfill the County’s stated expectations. ▪ Conduct collection and analysis of relevant data. ▪ Review, document, evaluate, and generate recommendations in accordance with each component of the work plan.

*The Project Manager will be assigned at the time of contract commencement and will be determined depending on workload and commitments at that time.

**Additional consultants with subject matter expertise may be used to assist with employee interviews if needed.



Work Plan & Approach

A detailed work plan and schedule designed for conducting a quality compensation study with clear reporting dates for each major activity.

Project Understanding

The County of Maui includes the islands of Maui, Moloka'i, Lana'i, and Kaho'olawe. It is the second largest county in Hawaii, covering 1,162 square miles. The population has grown steadily, reaching 164,836 in 2020. The county provides various services like public safety, sanitation, social services, and administrative functions. Unlike other parts of the United States, the government in Hawaii is highly centralized, with the state assuming responsibility for health, education, and welfare. The County is governed by the County Charter, which has been amended multiple times since its adoption in 1967.

While Maui boasts a desirable location and a strong quality of life, it also faces a high cost of living, particularly in housing. This unique context presents challenges in attracting and retaining qualified personnel across various county departments. The County is interested in a review of its current classification and compensation plan for employees in approximately 50 positions in the County. The 50 positions include the Mayor and nine councilmembers, and 40 directors and deputies of the counties departments.

A comprehensive compensation study is important for the County to ensure its long-term success in talent management. This study will provide critical insights into the current compensation landscape, allowing the County to benchmark its salaries and benefits against relevant public and private sector positions. By understanding its competitiveness in the market, the County can make data-driven decisions to attract and retain a skilled workforce essential for delivering exceptional services to its residents. This study is a strategic investment that promotes *a more efficient and effective government for Maui*.

MGT deeply understands Maui's unique labor market and cost-of-living dynamics. We will leverage this knowledge and our proven compensation study methodology to deliver a comprehensive and actionable plan for Maui County.

PROJECT DELIVERABLES:

- ◆ **Competitive Market Analysis:** A thorough analysis of Maui County's position salaries compared to similar public and private roles.
- ◆ **Cost-of-Living Adjusted Recommendations:** Salary recommendations that account for Maui's specific cost-of-living factors like housing and inflation.
- ◆ **Retention Strategies:** Evidence-based recommendations for incentives and programs to enhance employee recruitment and retention.
- ◆ **Actionable Report:** A clear and concise final report outlining findings, recommendations, and next steps.
- ◆ **Public Presentations:** Engaging presentations tailored for the county's stakeholders, effectively communicating the study's insights.

The Study will ensure an equitable compensation system that is both fair and competitive, enabling the County to recruit and retain qualified employees. The system will also be easy to administer in an organized and consistent fashion and sustainable for years to come.

MGT has conducted over 270 classification and compensation studies in the past 10 years. Over 95% of pay plans recommended by MGT have been successfully implemented by the client. All these studies included the use of public-sector salary data and included the following recommendations:

- ◆ New classification and compensation plans, assuring internal equity.
- ◆ Recommendations for job title changes where appropriate.
- ◆ Recommendations on how to deal with specific problems that arose during the study (i.e., compression issues, internal equity issues, market discrepancy issues, etc.).
- ◆ Pay plans that were tied to performance.

Project Management

MGT uses proven project management methodologies to ensure we deliver project results that are on time, on budget, and meet or exceed client expectations by identifying long-term, decision-making solutions.

We find that the two most critical keys to project success are **planning** and **communication**.

We take very intentional measures to define milestones, responsibilities, and delivery dates in our **planning** process, track work progress against the work plan daily, and provide regular project status reports. After the contract is awarded, we enhance the project work plan that was included in our proposal by adding specific milestones, delivery dates, and consultant responsibilities. We refine this plan with input from our project initiation meeting(s) with the client. We employ problem-solving skills, technology, and staff adaptability to react to variances between work plan projections and actuals to meet the County’s deadline.

MGT Client Satisfaction Components



Throughout this process, we remain in frequent **communication** with the client to avoid surprises or conflict. Our project teams are in regular contact with the County’s Project Manager, providing regular project status updates and calls to provide a summary of progress and to address any risks or variances from the planned schedule.

Our team’s approach to compensation studies is based on the methodologies, models, and tools that we have developed for this specific type of work, coupled with **nearly 50 years** of service to public sector organizations across the country. To successfully conduct a study, it is important to fully understand the environment in which an organization operates and the objectives of the study to provide a complete, forward-thinking compensation program and final report.

Proposed Work Plan

To accomplish the County's objectives, MGT will take the following steps listed in the order in which the work will be performed. Please note that we have specified those areas where we will need the County's input/assistance.

Task 1.0: MEETINGS, SALARY SURVEY, & JOB ANALYSIS

Activities

1.1 Study Preparation and Project Meeting

Meet with County representatives to discuss study methods, review organization charts, personnel policies/practices, and the current classification and pay plans. MGT will review the timeline, answer questions, review the scope and schedule of work. MGT will require the County to submit a data collection worksheet along with the following information (if available): copies of organizational charts for each department, pay plans, the current personnel manual, and any other relevant information related to salaries.

1.2 Establishing Comparables

Working with County staff and using our broad-based cohort methodology, MGT will determine a logical survey sample of "like" entities that impact the compensation market for the County. In selecting comparable jurisdictions, we use criteria such as number of employees, population served, Equalized Assessed Value (EAV), budget size, and proximity.

1.3 Preparing for and Hosting Employee Kick Off Meeting

Shortly after the initial project meeting with the County representatives, MGT will meet virtually with employees to explain the scope of the project and distribute Job Analysis Questionnaire (JAQ) forms. MGT understands many employees have not participated in this type of process before, and we take the time to carefully explain the purpose of the project to the employees and to answer any questions they may have. If any of the employees are not available when these first meetings are held, a recorded presentation of the meeting will be made available to them. Employees will then be allowed two weeks to complete the questionnaire. The questionnaires will also be reviewed by each employee's supervisor and returned to MGT within four weeks of distribution.

1.4 Prepare Market Survey, Survey Distribution, and Follow-Up

MGT will prepare the market surveys to gather data for all classifications in the comparable entities. In addition to job titles, brief position descriptions are included in the market survey to make sure we are receiving salary data for "like" positions in the comparable entities. MGT will also use the CompAnalyst tool from Salary.com to gather market data for positions in the Study. The criteria will be determined at the time of analysis.

Note: While MGT will prepare all the materials to be sent out for the market surveys, we have found sending out the survey under the client's email generates a better/faster response than when it is sent out under our letterhead/name. In addition, the County may be asked to make one follow-up contact with those entities that do not initially respond to the survey request.

1.5 Job Evaluation Analysis and Establishment of Job Classification System

Upon return of the JAQs by the County, MGT will perform the following:

- A. Read each JAQ and corresponding Job Description (up to 40), in their entirety.

WORK PLAN & APPROACH

B. Prepare for and conduct a virtual interview with at least one employee from each position to further understand the scope of their job.

C. Analyzing Data, Assigning Skill Levels, and Establishing a Classification Plan: Apply a measurement system of job evaluation factors, using nine main factors used in our job evaluation instrument to evaluate the internal/comparable worth of each job classification. Upon completion of the job evaluation measurements, a new Classification Plan will be developed. It is important to emphasize the job, not the qualifications or performance of the incumbents, is being evaluated. Part of this process will include the evaluation of current job titles and the recommendation for any changes, assuring the job title and related recommended pay range match the employee's actual tasks.

Note: A formal job evaluation system, such as the one utilized by MGT, is an attempt to objectify the reasons jobs are compensated differently. Most compensation practitioners agree that three basic factors are important in determining compensation. These are: (1) skills required, (2) responsibility, and (3) working conditions. The Equal Employment Opportunity Commission (EEOC) recognizes these three basic factors, along with seniority and performance, as valid determinants of compensation. The nine factors used by MGT are essentially subdivisions of the first three factors mentioned above. In addition, it is MGT's practice that – under Title VII of the Civil Rights Act of 1964, the Americans with Disabilities Act (ADA), and the Age Discrimination of Employment Act (ADEA) – it is illegal to discriminate in any aspect of employment. MGT will not use discriminatory practices on the basis of race, color, religion, sex, national origin, disability, or age when performing a classification analysis. Decisions and recommendations will not be based on stereotypes or assumptions about the abilities, traits, or performance of individuals of a certain sex, race, age, religion, or ethnic group, or individuals with disabilities.

Based on the results of the job evaluation process outlined above, assign all classifications to skill levels. Logical breaks in the continuum of points determine the skill levels used for determining the classification system. For example, skill level 1 might contain jobs that scored between 185 and 200 points, skill level 2 between 205 and 220 points, and so on.

Review the results of the job evaluation exercise with County representatives and revise, as necessary.

In addition, MGT will invite Department Heads to participate in an online survey, the Management Issues Process Survey (MIP), as an opportunity to communicate specific concerns related to the County current classification and compensation system. The feedback collected will augment the Classification process.

Deliverables

- ◆ Start Up Documents
- ◆ Job Analysis Questionnaire Form
- ◆ Management Issues Process (MIP) Survey

Task 2.0: DATA ANALYSIS

Activities

2.1 Compiling and Analyzing Market Data and Creating the New Compensation Plan

Tabulate, summarize, and analyze comparative market data. MGT's pay tabulations compare the County's salaries for the positions, with the minimum and the maximum of the market data for each position, when possible. Data is displayed for each jurisdiction and summarized in an overall

table. This data is analyzed to determine the percentage difference between the County's present pay for each position and the market data.

MGT will incorporate the market data with the Skill Levels described in Section 1.5 to put together the new Compensation Plan. MGT will work with the County to determine the County's policy (or MGT will make a recommendation) with respect to compensation (i.e., 50th percentile; 75th percentile, etc.). Once this is determined, MGT will use the market data to develop and recommend new salary schedules for the County's 50 classifications. This process will include a recommendation regarding how employees are inserted into the new plan and how they move through the proposed pay plan (either via a merit system or defined merit increment plan), with recommendations for a specific performance-oriented program with respect to salary advancement through the new salary ranges. The salary schedules will outline what the specific percentages are between ranges and grades.

2.2 Preliminary Analysis Review and Training

MGT will meet with the County to review the preliminary analysis. The preliminary analysis is a draft version of the proposed Classification and Compensation Plan. The review can take multiple meetings to ensure that everything is covered, and all questions are answered. MGT will also require feedback from the County on certain aspects of the proposed Plan.

During these meetings, MGT will train designated staff on the use of the system, maintenance, and upkeep of the Plan. A manual outlining the process will be provided to the County.

Additionally, MGT will provide **support services at no additional cost** to the County for one year from the date of an executed contract. This will include any communication regarding questions concerning the report.

2.3 Compiling, Analyzing and Reviewing Benefit Data

MGT will compile, analyze and review benefit data that was collected through the market survey. MGT will provide a summary table for each benefit offering that was included in the survey and provide a narrative on the benefit offerings in the final report. MGT will compare the benefits offered in County with the benefits provided in the comparable communities and note if they are above or below the average for each offering.

Deliverables

- ◆ Market Data
- ◆ Proposed Pay Plan(s)
- ◆ Summary of Benefit Data

Task 3.0: PROGRESS COMMUNICATION AND UPDATES

Activities

- ◆ MGT prides itself on our attention to and communication with our clients as the project proceeds. As such, MGT will strive to maintain regular contact with the County's representative and to be available to address the County's questions, concerns, and needs.
- ◆ MGT will share updates with the County as requested, and particularly at critical points in the Study. Additionally, the Project Manager will meet with the County representative, and, if requested, other key staff such as department heads, to review the results of the job evaluation exercise and the proposed new salary schedules.

Deliverables

- ◆ Ongoing communication with the County
- ◆ Progress Updates

Task 4.0: DRAFT AND FINAL REPORT PREPARATION

Activities

- 4.1 A draft report will be prepared by the Consultants and sent electronically to the County that includes:
- Executive Summary highlighting the overall scope of the Study and the general observations, outcomes, and recommendations contained within the Report.
 - Summary of all aspects of the Study, including recommendations, methods, and guidelines for achieving the overall aspects of the Study, as well as recommendations for annual maintenance and review of the new plans.
 - Pay ranges that are consistent with the County’s pay policy, outlining the pros and cons of each option.
 - Assignment of each position to an appropriate classification and pay grade based on internal equity and marketplace considerations.
 - Maintenance plan with recommendations on keeping the plan equitable and up to date over the next 5-10 years, and recommendations on review of position descriptions as vacancies arise, evaluation of new position requests, etc.
 - Implementation plan and cost estimates for implementing the study’s findings and recommendations.

Note: Overtime costs will not be included, and the analysis will be estimates only, with sufficient detail to allow the County to compare various options.

- 4.2 Once the County representatives return review comments, a final report will be prepared and sent to the County.

Deliverables

- ◆ Draft Report
- ◆ Final Report

Task 5.0: PRESENTATION OF FINDINGS

Activities

The MGT Project Manager will present the finalized plan recommendations and final report to the County.

Project Timeline

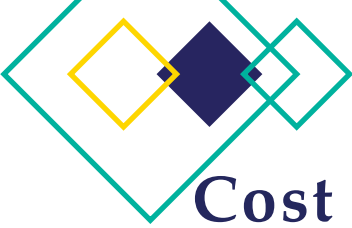
MGT is available to start this project within four to six weeks of acceptance of the proposal. Based on MGT’s experience conducting similar projects, we anticipate the proposed project can be completed within approximately 16 weeks of project initiation, as illustrated in **Exhibit 1**. The schedule is contingent, however, upon the timely response from the comparable entities supplying the market data, and the employees and supervisors in returning the completed JAQs. Any delays in receipt of this information are beyond the control of MGT and may lengthen the completion of the report.

Exhibit 1. Proposed Schedule

WORK PLAN TASKS	WEEK															
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16
Meet with County representatives to discuss Study methodology and expectations.	█															
Prepare and distribute market surveys to comparable entities.		█														
Conduct employee meetings, provide JAQs, and explain the purpose of the Study and the process.			█													
Return of JAQs and market surveys.				█	█	█										
Reading of JAQs and job descriptions.							█									
Conduct employee interviews.								█								
Analyze data; prepare new classification and compensation plans; send draft findings to the County.									█	█	█					
Meet with key County representatives to review preliminary findings.												█				
Receive comments from the County.													█			
Prepare the draft report and send it to the county; receive return comments.														█		
Prepare Final Report.															█	
Present Final Report to the County																█

MGT prides itself on adhering to this timeframe.

Our past clients will confirm our diligence in delivering the final report and other deliverables on time and within budget.



**Defined by Impact. Driven by People.
Dedicated to the Community.**

Our cost proposal reflects our interpretation of the written requirements within your solicitation. **We take pride in customizing our client’s needs — and we will work with you to ensure our fees are aligned with your expectations and budget.** We have proposed the entire Study be conducted virtually; however, if the County requests any in-person meetings, MGT will provide an additional estimate for travel and related expenses. By conducting our studies virtually, we can provide significant cost savings for our clients. Costs are shown below with and without travel.

Cost WITHOUT Travel (virtual study):

In keeping with the above statement of our usual practices, we estimate the fixed fee for the entire study to be **\$32,760** plus other Optional Services (see below). We have listed the cost of our professional fee for each study component below. Payment will be due as follows: 40% of the professional fees will be due after the initial project meeting, 40% will be due after the preliminary analysis is provided to the Client, and the remaining 20% will be billed after the Study is completed. Invoices will be sent to the County and are payable within 30 days of receipt.

Cost WITH Travel:

If the County would like onsite visits, MGT would recommend one (1) trip to present the final results of the Study. MGT would be willing to make more than one (1) trip; other trips could be for employee meetings or to review the preliminary analysis. The cost per trip is estimated at a not-to-exceed amount of \$10,000, and this includes time and travel expenses. Based on our recommendation of one (1) trip, we estimate the fixed fee for the entire study to be **\$42,760** plus other Optional Services (see below). We have listed the cost of our professional fee for each study component below. Payment will be due as follows: 40% of the professional fees will be due after the initial project meeting; 40% due after the preliminary analysis is provided to the County; and the remaining 20% plus travel fees will be billed after the Study is completed. Invoices will be sent to the County and are payable within 30 days of receipt.

Exhibit 2. Proposed Cost by Task

Milestones and Tasks		Professional Hours – Project Manager	Professional Hours - Specialist and Consultants	TOTAL (\$)
1.0	Meetings, Market Survey, and Job Analysis			
1.1	Study Preparation and Project Meeting	3	1	780
1.2	Establishing Comparables	2	8	1,950
1.3	Preparing for and Hosting Employee Kick-Off Meeting	6	0	1,170
1.4	Prepare Survey, Survey Distribution, and Follow-up	2	4	1,170
1.5	Review and Reading of JAQs and Job Descriptions	2	16	3,510
	Preparation for Employee Interviews and Conducting Employee Interviews	8	12	3,900
	Analyzing Data, Assigning Skill Levels, and Establishing a Classification Plan	14	0	2,730
2.0	Data Analysis			

COST

Milestones and Tasks		Professional Hours – Project Manager	Professional Hours - Specialist and Consultants	TOTAL (\$)
2.1	Compiling, Analyzing, and Reviewing Market Data	4	12	3,120
	Incorporating the Classification Plan with the External Market Data	12	0	2,340
	Creating a New Compensation Plan with Salary Schedules	12	0	2,340
2.2	Preliminary Analysis Review and Training	10	0	1,950
2.3	Compiling, Analyzing, and Reviewing Benefit Survey Data	2	6	1,560
3.0	Progress Communication and Updates	12	0	2,340
4.0	Draft and Final Report Preparation			
4.1	Preparing Draft Report	5	5	1,950
4.2	Final Report	4	0	780
5.0	Presentation of Findings	6	0	1,170
Total Hours and Cost:		104	64	\$32,760
Travel Expenses		Project Manager Time Costs	Travel Costs	TOTAL (\$) per Trip
Travel Cost (Time and Travel per trip)		40	2,200	10,000
Total Hours and Cost for Study with 1 On-site Visit*		144	2,200	\$42,760

NOTE: If the County accepts our proposal for this project, MGT will provide **support services at no additional cost for one year** from contract execution. This will include any communication regarding questions concerning the report.

Optional Services/Cost

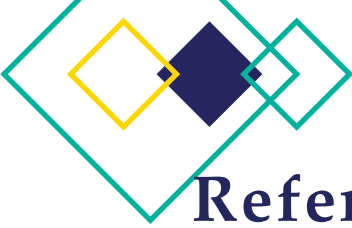
PROGRESS REPORTS – It is customary to have periodic telephone conversations throughout the Study to provide progress reports. There will be no charge for these periodic telephone updates.

SITE VISITS – If the County requests any on-site visits, there will be additional costs for the MGT’s time and expenses.

JOB DESCRIPTIONS – Updates to existing job descriptions cost \$250 each; new job descriptions, if needed, cost \$300 each. Job descriptions will be completed upon conclusion of the Study and are billed separately.

ADDITIONAL SERVICES – Any additional services not covered in this proposal and requested by the County will be billed at the rate of \$150 per hour plus expenses, including assistance with employee appeals.

This quote is firm and irrevocable for a period of three months, after which prices may increase.



References

A leader in classification and compensation studies.

More than one-third of the organizations served by MGT’s GovHR have contracted for multiple projects; we feel repeat business is the greatest testament to our commitment to customer service and client satisfaction. We encourage you to contact any of our references to learn of our professionalism, ability to meet timelines, and the expertise of our staff.

DEKALB COUNTY HEALTH DEPARTMENT-COMPENSATION STUDY

LISA GONZALEZ, PUBLIC HEALTH ADMINISTRATOR
2550 N. ANNIE GLIDDEN ROAD, DEKALB, IL 60115
LGONZALEZ@DEKALBCOUNTY.ORG | 815-758-6673



CLINTON AND MONTCALM COUNTY ROAD COMMISSION-COMPENSATION STUDY

DOUG STEFFEN, MANAGING DIRECTOR
3536 S. US HIGHWAY 27, ST. JOHNS, MI 48879
STEFFEND@CCRC-ROADS.COM | 989-668-0030



TOWNSHIP OF DOYLESTOWN, PA-CLASSIFICATION AND COMPENSATION STUDY

STEPHANIE J. MASON, ICMA-CM, TOWNSHIP MANAGER
425 WELLS ROAD, DOYLESTOWN, PA 18901
SJMASON@DOYLESTOWNPA.ORG | 215-348-9915



MCFARLAND, WISCONSIN-CLASSIFICATION AND COMPENSATION AND STAFFING STUDY

CASSANDRA SUETTINGER, WCMC, DEPUTY ADMINISTRATOR
5915 MILWAUKEE STREET, MCFARLAND, WI 53558
CASSANDRA.SUETTINGER@MCFARLAND.WI.US | 608-838-3153



TOWN OF NORTH ANDOVER, MASSACHUSETTS-CLASSIFICATION AND COMPENSATION STUDY, AND JOB DESCRIPTION UPDATES

DENISE CASEY, DEPUTY TOWN MANAGER
120 MAIN ST, NORTH ANDOVER, MA 01845
DCASEY@NORTHANDOVERMA.GOV | 978-688-9510



Appendix A. Staff Biographies

Biographies of our proposed project personnel are provided on the following pages. The personnel described in our proposal are the professionals who will provide the services for this project. We may use additional staff consultants with subject matter expertise to assist with employee interviews if needed.



Senior Vice President, Classification and Compensation Project Manager | GovHR, within MGT's Social Impact Solutions

Rachel Skaggs

Rachel Skaggs is a Senior Vice President and Classification and Compensation Project Manager with GovHR USA. Prior to working with GovHR, Ms. Skaggs spent 10 years in local government management. She has managed substantial capital and general budgets, developed utility policies, improved economic development initiatives, and managed human resources functions.



During her time with GovHR, Rachel has managed over 50 classification and compensation projects for communities nationwide and entities of all sizes, ranging from 10 employees to 120+ employees and populations from 1,000 to 100,000. Rachel works with various clients, including municipalities, county governments, park districts, forest preserve districts, councils of governments, and non-profit agencies. Rachel prides herself on working closely with clients in a team environment to ensure they have a successful plan with both internal and external equity that can be used and administered seamlessly for years to come. During her work on Classification and Compensation projects, Rachel analyzed benefit data, developed job descriptions, and reviewed Fair Labor Standards Act (FLSA) requirements for positions.

Rachel has local government management experience in Illinois, including with the Village of Montgomery, the Village of Schaumburg, and the City of Princeton. She has managed substantial capital and general budgets, developed utility policies, improved economic development initiatives, and managed human resources.

Rachel is a native of Walnut, Illinois, and a Bureau Valley High School graduate. She possesses a master's degree in public administration from Northern Illinois University in DeKalb, Illinois.

Rachel served as the City Manager for Princeton, Illinois, from 2015 to 2019. Princeton is an active City located two hours west of Chicago on Interstate 80. Princeton is unique in that it provides all their own City services including electric, water, sewer, garbage, cemeteries, and a City-owned hospital. For a town of 7,800 people, the City has a budget of over \$25 million. The community is known for its significant historic buildings, with two downtown districts placed on the National Register of Historic Places. During Rachel's tenure, she completed numerous projects, including creating utility policies, developing operating and capital budgets, streamlining human resource operations, consolidating utility billing, refinancing debt, and successfully negotiating multiple union contracts.

Prior to her time with the City of Princeton, Rachel served as the management analyst for the Village of Schaumburg and for the Village of Montgomery. During her time as a management analyst, she was responsible for human resources tasks, capital improvement planning, budgets, special events, and community outreach.

Rachel is passionate about community engagement, diversity and inclusion, and volunteerism. Rachel has co-authored two articles that focus on women in government and the history behind the low numbers of women in executive-level positions in local government. Throughout her tenure as a City Manager, Rachel developed committees and commissions to help lead the City forward and to increase community engagement and volunteerism. Rachel believes cities and towns all over the U.S. can succeed with community interaction, citizen involvement, diversity and inclusion, and trust.

Professional Education

Master of Public Administration, Northern Illinois University
 Bachelor of Arts – English and Political Science, Northern Illinois University

Memberships and Affiliations

International City and County Management Association
 Illinois City/County Management Association
 Illinois Public Employer Labor Relations Association
 The Legacy Project
 Princeton Rotary Club



Rachel Skaggs

Senior Vice President, Classification and Compensation Project Manager | GovHR, within MGT's Social Impact Solutions

Professional Background

City Manager, Princeton, IL 2015 – 2019
Management Analyst, Village of Schaumburg, IL 2012 – 2015
Management Analyst/HR Manager, Village of Montgomery, IL 2009 – 2012

Professional Development and Speaking Engagements

Presentation on Females in Local Government:
ICMA Conference, Phoenix, Arizona (2012)
The Legacy Project
ILCMA
Public Management Magazine article “Women Leading Government,” co-authored with Heidi Voorhees
Public Voices XIII No. 2 article “Advancing Women in Local Government: The Case in Illinois” co-authored with Dr. Kimberly Nelson

Katy Yee brings over 25 years of experience in multiple public sector settings, focusing on human resources and administrative management. Katy's human resources areas of concentration have included organizational development, compensation, recruitment and retention, and training and staff development.



The cornerstone of Katy's career is with the DuPage County Government and the DuPage County Health Department. At those organizations, she coordinated and participated in several agency-wide compensation studies utilizing and applying the Korn-Ferry (formally Hay Group) methodology. While working in public health as Director of Organizational Development, Katy was directly responsible for the areas of quality improvement, compliance, and accreditation. In addition, she led agency-wide initiatives focused on integrating services and improving client access to care. Some of these initiatives included redesigning client intake processes, supporting the implementation of an electronic medical record, and ensuring compliance with Affordable Care Act (ACA) requirements.

Most recently, Katy worked with Elgin Community College and the Forest Preserve District of Kane County. Both of these opportunities highlighted Katy's ability to engage and contribute to organizational effectiveness in various public sector settings. Her broad depth of knowledge, professionalism, and approachable style have enabled her to build relationships at all levels within each organization and provide relevant, practical, and valuable human resources support.

Katy's philosophy on human resources and organizational development has always been that of a "business partner" – she truly enjoys working on solutions that help support the organization's operational needs.

Professional Education and Training

Bachelor of Arts degree in Urban Studies from Elmhurst College

Certificate in Marketing Analytics from Udacity

SHRM-CP certified through the Society for Human Resources

Certified Time Management Trainer

Advanced Project Management

Memberships and Affiliations

Society for Human Resources (SHRM)

Illinois Park and Recreation Association (IPRA)

Professional Background

Over 29 Years of Local Government Experience

Forest Preserve District of Kane County, Geneva, IL

- Director of Human Resources

Elgin Community College, Elgin, IL

- Director of Compensation and Talent Acquisition

DuPage County Health Department, Wheaton, IL

- Director of Organizational Development
- Human Resources Manager

DuPage County Government

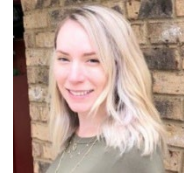
- Interim Director of Human Resources Human Resources Manager
- Human Resources Supervisor
- Human Resources Generalist and Recruitment Specialist



RACHEL KING

Consultant | Social Impact Solutions

Rachel King has nearly seven years of experience devising and implementing HR procedures. Her areas of expertise include policy development, employee recognition and engagement, classification and compensation, benefits reviews, and performance management. Ms. King also has experience with the management and development of annual operating budgets, preparing monthly financial reports and analyses, and contributing to the maintenance of accurate, up-to-date general ledgers. Her primary responsibilities include obtaining, compiling, and analyzing complex information and data for projects, survey administration, supporting the project director with project communications, and writing and editing reports. Ms. King is currently studying for her SHRM-CP Certification and the SHRM People Analytics Specialty Credential.



Areas of Expertise

- ◆ HRIS & ATS
- ◆ Benefits Administration
- ◆ Performance Management
- ◆ HR Strategy Creation & Execution
- ◆ Onboarding & Offboarding
- ◆ Training & Leadership Development
- ◆ Employee Relations Management
- ◆ Policy Development
- ◆ Project Management
- ◆ Compensation Management
- ◆ Employee Retention
- ◆ Employee Engagement & Satisfaction

Education

B.S., HR Management, Southern New Hampshire University, 2020

Professional Experience

MGT, Consultant, 2022-present

cove.tool, HR Manager, May 2021 – March 2022

Edward Jones, HR Generalist, June 2019 – May 2021

Edward Jones, Office Manager/Retirement Specialist, February 2016 – June 2019

Relevant Project Experience

DIVERSITY AND INCLUSION / DISPARITY

- ◆ Athens-Clarke County, GA | DEIB Study
- ◆ Contexture (CO) (AZ) | DEIB Study
- ◆ City of Pleasanton, CA | DEIB Study
- ◆ County of Montgomery, MD | DEIB Study
- ◆ Empire State | DEIB Study
- ◆ Essex, MD | DEIB Study
- ◆ City of Frederick, MD | DEIB Study
- ◆ Housing Authority of the County of San Buenaventura, CA | DEIB Study
- ◆ City of Houston, TX | DEIB Study
- ◆ Howard County, MD | DEIB Study
- ◆ City of Portsmouth, VA | DEIB Study
- ◆ Pitkin County, CO | DEIB Study
- ◆ City of Pleasanton, CA | DEIB Study
- ◆ Queens Library, MD | DEIB Study
- ◆ City of Richmond, VA | DEIB Study
- ◆ City of San Jose, CA | DEIB Study

HUMAN CAPITAL

- ◆ Hawkeye Community College, IA | Classification and Compensation Study
- ◆ Iowa Central Community College, IA | Classification and Compensation Study
- ◆ Lapeer County, MI | Classification and Compensation Study
- ◆ Lenawee County, MI | Classification and Compensation Study
- ◆ Livingston County, MI | Classification and Compensation Study
- ◆ Livingston County Community Mental Health, MI | Classification and Compensation Study
- ◆ Muskegon County, MI | Classification and Compensation Study
- ◆ Navajo Tribal Utility Authority, AZ | Classification and Compensation Study
- ◆ Rhode Island Housing, RI | Executive Compensation Survey & Analysis



RACHEL KING

Consultant | Social Impact Solutions

- ◆ City of Santa Clara, CA | DEIB Study
- ◆ City of Snohomish, WA | DEIB Study
- ◆ State of Maryland | DEIB Study
- ◆ State of Maryland Cannabis Study | DEIB Study
- ◆ Southern Nevada Regional Housing Authority, NV
- ◆ City of Stonecrest, GA | Classification and Compensation Study
- ◆ Sangamon County | Attorney Compensation Market Survey & Analysis
- ◆ Tampa Housing Authority, FL | Classification and Compensation Study
- ◆ Tuscola County, MI | Classification and Compensation Study
- ◆ York County, SC | Pay Grade, FLSA Review, & Job Description; Classification/Compensation Updates



Alice Bieszczat



Classification and Compensation Specialist | GovHR, within MGT's Social Impact Solutions

Alice Bieszczat is a Classification and Compensation Specialist with over 25 years of experience spanning the private, non-profit, and public sectors.

Alice has managed or assisted in over 120 classification and compensation studies in 15 states over the past 10 years. Alice has worked with various organizations, including municipalities, counties, park districts, special services agencies, and not-for-profit organizations. Studies varied in size and complexity, including union, non-union, management, technical, and administrative positions.



Alice has provided human resources consulting services for both Voorhees Associates and the PAR Group, as well as non-profit consulting services for clients including the Ann & Robert H. Lurie Children's Hospital of Chicago, the North Shore Senior Center, Aurora Healthcare, and the Archdiocese of Milwaukee. Her most recent consulting assignments have included Classification and Compensation Studies in Wisconsin, Indiana, Iowa, Illinois, Massachusetts, Connecticut, Ohio, Pennsylvania, West Virginia, Washington, and Michigan.

Alice also worked for the Chaddick Institute of Metropolitan Development at DePaul University. During her tenure there, she helped implement programs advancing the field of urban planning and design review for municipalities in metropolitan Chicago. Her research on transportation innovations was published in the *Transportation Research Journal* and featured in national media such as the *New York Times*, *Atlantic Cities*, and *Planning Magazine*. She has lectured on transportation innovations in conferences, seminars, and university settings. At Lurie Children's Hospital of Chicago, Alice led the Foundation Gifts team in securing leadership gifts to support its community-based outreach programs and the construction of its new facility in downtown Chicago. Alice began her career in telephony as a Radio Frequency Engineer for Sprint Cellular and Alltel, where she partnered with local maintenance technician teams to plan, design, implement, and optimize cellular phone networks nationwide.

Professional Education

Master of Public Service Management, DePaul University, IL

Bachelor of Science in Mathematics, DePaul University, IL

Professional Development & Speaking Engagements

Published research on transportation innovations in *Transportation Research Journal* and *Transport Policy*

Lecturer on Transportation Innovations

Professional Background

More than 25 Years of Experience in Private, Non-Profit, and Public Sectors

- GovHR USA/MGT, 2008; 2012 – Present
- Chaddick Institute of Metropolitan Development at DePaul University, IL; 2009 – 2012
- Lurie Children's Hospital of Chicago; 2005 – 2008
- American Diabetes Association; 2004 – 2005
- Accelerated Fundraising Solutions; 2000 – 2003
- Sprint Cellular/Alltel; 1996 – 2000

Professional Consulting

- Aurora Healthcare and the Archdiocese of Milwaukee
- Ann & Robert H. Lurie Children's Hospital of Chicago
- North Shore Senior Center
- Logan Square Neighborhood Association



Classification & Compensation Specialist | GovHR, within MGT's Social Impact Solutions

Julie Hawkins

Julie Hawkins is a local government professional who has served municipalities for over 30 years in the areas of local government administration and human resources.

Julie has assisted with over 25 Classification and Compensation Studies in the past year, in addition to many more over the course of her career.

Julie has worked collaboratively with numerous elected and appointed officials in municipalities, park districts, library districts, water agencies, and the like. Julie's primary areas of expertise include classification and compensation studies, personnel policy and job description creation and updates, recruitment, and staffing studies. Julie has also written and presented on various human resource-related training topics, including hiring and onboarding, performance management, HR compliance in the public sector, I-9 compliance, and ethics programs.



Julie is familiar with and dedicated to the public sector and its impact on our daily lives. Julie has assisted many organizations over the years by serving on various boards and helping with annual conferences by speaking and organizing events. These organizations are listed below.

Professional Education, Training, & Instruction

Master of Arts in Public Administration (M.P.A.), Northern Illinois University
 Bachelor of Arts in Public Administration & Political Science, Augustana College

Memberships and Affiliations

International City/County Management Association (ICMA) – Annual Conference Committee
 Illinois City/County Management Association (ILCMA)
 Illinois Association of Municipal Management Assistants (IAMMA) – Past President
 Society for Human Resource Management (SHRM)
 Illinois Public Employer Labor Relations Association (IPELRA)
 Illinois Association of Park Districts (IAPD/IPRA)
 Illinois Library Association (ILA)
 Illinois Government Finance Officers Association (IGFOA)

Professional Background

37 Years of Experience in Local Government Administration & Human Resources

Sikich LLP, Naperville, Illinois – Human Resources Consultant, 2009-2017
 CCF Consulting, Public Sector Human Resources Consulting Services, St. Charles, Illinois – Owner 1996-2009
 Village of Carol Stream, Illinois – Assistant to the Village Manager, 1989-1996
 Village of Elk Grove, Illinois – Administrative Assistant, Village Manager's Office; Administrative Assistant, Public Works; Administrative Intern – 1987-1989
 City of Rock Island, Illinois – Administrative Intern, 1986-1987



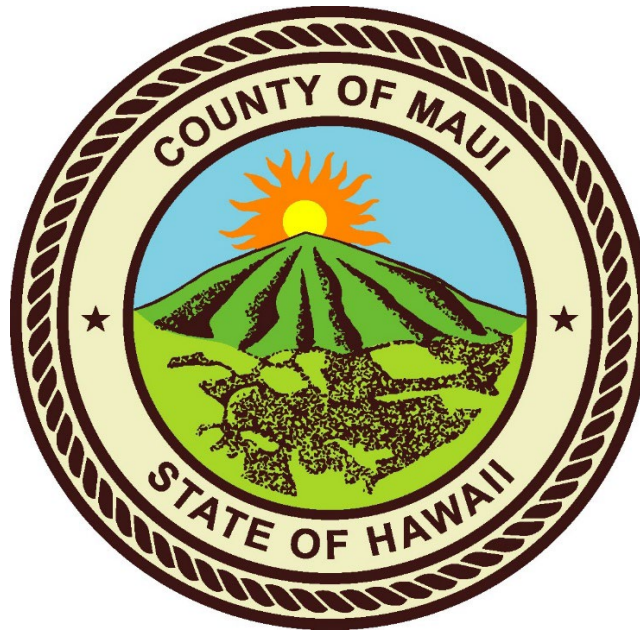
MGT

REQUEST FOR PROPOSALS

COUNTY OF MAUI DEPARTMENT OF MANAGEMENT

ADMINISTRATIVE/PROFESSIONAL SERVICES CONSULTANT TO PERFORM SALARY ANALYSIS AND COMPARISON STUDY

RFP NO. 23-24/P-196



The Department of Management is accepting proposals for six months of administrative/professional services to perform a salary analysis and comparison study

Deadline for proposals:

Proposals due: **July, 19, 2024, 4:00 p.m. HST**

Proposals received after the stated deadline will not be considered

Proposals must be submitted via the Public Purchase System at www.publicpurchase.com

Contact Information:

Jared Masuda, Central Purchasing Agent
County of Maui, Department of Finance
2145 Wells Street, Suite 104
Wailuku, HI 96793
808.463.3816
Jared.masuda@co.maui.hi.us

NOTICE TO OFFERORS

CONSULTANT TO PERFORM A SALARY ANALYSIS AND COMPARISON STUDY FOR THE COUNTY OF MAUI DEPARTMENT OF MANAGEMENT

RFP # 23-24/P-196

Pursuant to Chapter 103-D, HRS, sealed offers shall be RECEIVED ELECTRONICALLY and recorded immediately via the Public Purchase System until **4:00 p.m., Hawai'i Standard Time, on July 19, 2024.** Proposals are required to be submitted via the Public Purchase System; otherwise, the proposal shall not be opened or considered. Proposals received after the time fixed for opening will not be considered.

Bid documents may be obtained from the above-named office via Public Purchase (www.co.maui.hi.us/DocumentCenter/View/91025), an e-procurement system.

The County of Maui Department of Management is accepting proposals for a consultant to perform a salary analysis and comparison study.

Proposals will be reviewed, and those firms whose proposals most appropriately meet the County of Maui's needs will be considered.

OFFERORS ARE STRONGLY ENCOURAGED TO CAREFULLY READ THE ENTIRE SOLICITATION.

Electronic copies of this RFP and attachments, if any, can be obtained from the County of Maui Purchasing Website at

<https://www.publicpurchase.com/gems/register/vendor/register>



Marcy Martin
Acting Director of Finance
County of Maui

PART 1: INTRODUCTION

1.1. PURPOSE OF THE RFP

The COM of Maui (“COM”), through its Department of Management, seeks comprehensive proposals from qualified and experienced professional consultants with expertise in salary analysis.

The purpose of this RFP is to select one vendor to provide data to enable the Salary Commission and the County of Maui to evaluate whether the salaries and benefits earned by County department directors, deputy directors, and elected officials are competitive with those of similar employees in the private sector and in other governmental organizations; and to make adjustments, if needed, based on conclusions from the data. The data collected will be inclusive of pay and benefits for the following groups of County employees:

- A. Elected positions for which the Salary Commission sets salaries, including the Mayor and nine Councilmembers.
- B. Appointed positions for which the Salary Commission sets salaries, which number approximately 40, and include the directors and deputies of the County's departments (including the police and fire chiefs, corporation counsel, prosecuting attorney, auditor, and county clerk).

The 2 groups of County Positions that are to be included in the study are referred to herein as “Study Positions”.

Consultant (“Offeror”) shall have knowledge of Federal and State rules, regulations and guidance in all aspects concerning the primary objectives identified above.

This contract for services shall be for 6 months, with the option to renew for a subsequent one year term. Any extensions to the contract are subject to the availability of funds and will be under the same terms and conditions as specified herein. The contract period shall begin upon issuance of the Notice to Proceed (NTP) by the COM. Either party upon thirty (30) days of written notice may cancel this contract.

1.2. SUBMISSION INSTRUCTIONS & PROVISIONS

Proposals shall be completed, signed and submitted, which includes price and any required forms, via the Public Purchase System at www.publicpurchase.com no later than **4:00 p.m., Hawai'i Standard Time, July 19, 2024**. The County of Maui will not be responsible in any way for errors in transmission or failure to receive the bid by the deadline due to vendor error.

Proposal shall include all applicable taxes, services, personnel costs, travel and all other related expenses.

Offeror shall not submit more than one (1) offer.

All proposals and other material submitted shall become the property of County of Maui, and may be returned at the sole discretion of County of Maui.

1.2.1. COUNTY OF MAUI GENERAL TERMS & CONDITIONS

The County of Maui General Terms and Conditions for Goods and/or Services shall be made a part of the proposal documents, and can be found at the following link: <https://www.mauicounty.gov/DocumentCenter/View/3186/Goods-and-Services-?bidId=> Offeror acknowledges and agrees that there shall be no post-award revision to the General Conditions.

1.2.2. STATE OF HAWAII REQUIREMENTS

In accordance with Section 3-122-112, as amended, of the Hawaii Administrative Rules, the successful Offeror must produce the following documents:

- Tax Clearance Certificate
- DLIR Certificate of Compliance
- Certificate of Good Standing from the DCCA

The awarded Offeror is encouraged to use the Hawaii Compliance Express website to assist them in obtaining the above certificates. The State website is <http://vendors.ehawaii.gov>

It is not a requirement of the Offeror to supply the compliance documents as part of the submittal. However, these documents are required to be provided to the County by the time the contract will be prepared for execution, following award. For new users of HCE, or out of state/country vendors, the process to obtain the required documents may be time consuming. The Offeror is asked to certify that they are willing and able to obtain the compliance certification at time of proposal submission.

1.3. PRE-CONTRACTUAL EXPENSES

The County of Maui shall not, in any event, be liable for any pre-contractual expenses incurred by Offeror. Offeror shall not include any such expenses as part of its proposal.

- Pre-Contractual expenses are defined as expenses incurred by Offeror in:
- Preparing its proposal in response to this RFP;
- Submitting that proposal;
- Negotiating on any matter related to this proposal; or
- Any other expenses incurred by Offeror prior to date of award, if any.

1.4. SCHEDULE/TARGET DATES

All questions regarding this RFP, the scope of services and the selection process should be submitted by **July, 10, 2024** via the public purchase system at www.publicpurchase.com. Questions will be responded to in the order they are received, with all registered vendors receiving responses to all questions received.

Offerors are specifically directed not to contact any other COM personnel for meetings, conferences, or technical discussions related to this RFP. Failure to adhere to this policy may be grounds for rejection of proposal.

Proposals must be submitted no later than **4 p.m. on July 19, 2024**. Digital submission on proposal and all supporting material must occur via the Public Purchase website, www.publicpurchase.com.

The selection committee may request additional information and has the sole authority to reject any and all proposals and to discuss individual proposals with more than one respondent simultaneously. The submittal of a proposal does not guarantee that the applicant will receive an interview, however, all responding firms will be contacted regarding the outcome of the evaluation and selection via email.

1.5. RFP ADDENDA

Any acceptable modifications or clarifications shall be issued and distributed as Addenda. The issuance of a written addendum is the only official method whereby interpretation, clarification, or additional information can be given. Written addenda (if any) will be available and posted to the Public Purchase System prior to the procurement closing.

1.6. CONFIDENTIALITY

The COM is required to disclose non-exempt public documents. The COM is exempt from disclosing information submitted in response to a solicitation where the information is such that it “should reasonably be considered confidential.”

An Offeror who determines that information within its proposal meets the statutory requirement and requires that information remain confidential, the Offeror shall mark the bottom of the pages containing such information with the word “CONFIDENTIAL.”

If an Offeror marks every page of a proposal as “CONFIDENTIAL”, the statutory requirement is not met; any proposal so marked will not be deemed to have been submitted in confidence and upon request, the entire proposal will be disclosed.

After award, the contract(s) executed by the COM and the successful Offeror(s) will be a public document subject to disclosure. **No part of the contract can be designated as confidential.**

1.7. REFERENCES

The Offeror must disclose all contracts for similar services for the last FIVE (5) years, and these shall serve as potential references to be contacted by COM as part of the evaluation of the proposal. These would also include pro bono or volunteer work. Points of contact and contact information should be indicated for each contract listed.

The COM reserves the right to contact and investigate references named in the proposal and any other references provided by Offeror during the last FIVE (5) years. Investigation may include past performance of any Offeror with respect to its successful performance of similar projects, compliance with specifications and contractual obligations, its completion or delivery of a project on schedule, and its lawful payment to employees and workers or any other criteria as determined by the COM. The results of discussions with the references will be used in the evaluation of the proposal, as described in Part 4 of this RFP.

1.8. LEGAL RESPONSIBILITIES & CERTIFICATION

All proposals must be submitted, filed, made, and executed in accordance with COM, State of Hawaii and Federal laws relating to proposals for contracts of this nature, whether the same are expressly referred to herein or not.

By submitting a proposal, the Offeror certifies that the proposal submitted to COM is in accordance with any required authorization by the governing body of the Offeror's organization. The Offeror further certifies that the information and responses contained in the proposal are true, accurate, and complete, and that the COM may justifiably rely upon said information for purposes of evaluation and contracting with the Offeror. If it is subsequently discovered that any information provided in the proposal is false, it will result in the Offeror's elimination from consideration.

1.9. ANTICIPATED TIMETABLE

Event/Activity	Due Date
RFP Issued	June 18, 2024
Last Date to Submit Questions & Clarifications	July 10, 2024
Response to Questions & Clarifications	July 16, 2024
Proposal Submittal Deadline	July, 19, 2024
Evaluation Committee Recommendation	August 2, 2024
Vendor Selection (Award)	August 9, 2024

1.10. JOINT OFFERS

Where two or more Offerors desire to submit a single proposal in response to this RFP, they should do so on a prime-subcontractor basis rather than as a joint venture. The COM intends to contract with a single firm and not with multiple firms doing business as a joint venture.

1.11. WITHDRAWAL OF PROPOSALS

Any proposal may be withdrawn at any time prior to the time fixed in the public notice for

the receipt of proposals, only by written request filed with the Purchasing Division. The request shall be executed by the Offeror or his duly authorized representative. The withdrawal of a proposal does not prejudice the right of the Offeror to file a new proposal. No proposal may be withdrawn after the time fixed in the public notice for the receipt of proposals.

1.12. REJECTION OF PROPOSALS

Failure to meet the requirements of the RFP may be cause for rejection of the proposal. The COM may reject the proposal if it is incomplete, contains irregularities of any kind, or is offered conditionally. The County of Maui reserves the right to accept or reject any or all offers and to waive any minor or inadvertent discrepancy in the proposal documents.

1.13. BASIS FOR SELECTION

Based on the evaluation process and criteria discussed in Part 4 of this RFP, the highest ranked responsible and responsive Offeror will be selected.

1.14. AVAILABILITY OF FUNDS

Offerors are advised that entering into a contract for services is contingent upon availability of funds. If funds are not available, the COM reserves the right not to enter into a contract.

PART 2: SCOPE OF SERVICES

2.1. COUNTY OF MAUI OVERVIEW

The COM consists of the inhabited islands of Maui, Moloka'i and Lana'i and the uninhabited island of Kaho'olawe. The COM is the second largest of the four Counties in the State in area. Its land area (including the uninhabited island of Kaho'olawe) is 1,162 square miles (approximately the size of Rhode Island), or 18% of the land area of the State. Based on U.S. Census data, the County's resident population grew from 101,588 in 1990 to 128,241 in 2000 (26.2% increase) to 164,836 in 2020 (28.5% increase) and represents 11.3% of the State's total population.

The COM provides a broad range of municipal services. These services include public safety (police, fire, emergency management, and public prosecutor), construction and maintenance of highways and streets sanitation, social services, culture and recreation, public improvements, planning and zoning, water supply and general administrative services. Because there are no separate county or township governments or school districts in the COM, there are no general overlapping taxes at the county level. Government in the State is highly centralized with the State assuming responsibility for many functions that in many other parts of the United States are performed by local governments. Chief among these are health, education and welfare.

The County is governed by the provisions of the County Charter. The County Charter was originally adopted by the electorate in September 1967 and revised in 1976. On January 1, 1983, a new charter became effective after being adopted by the electorate

on November 2, 1982. The County Charter was amended in 1984, 1986, 1988, 1990, 1994, 1996, 1998, 2002, 2006, 2010, 2012, 2014, 2016, 2018, 2021 and 2023.

The County's official website address is www.co.maui.hi.us/.

2.2. STATEMENT OF WORK

1) The Scope of Work for the Services include:

- A. Conducting a compensation study of the County's current salaries for the Study Positions compared to current market-based salary information from other governmental agencies and the private sector for comparable positions (the "Services"). The Services shall consist of a market analysis of each position's salary, including the related salary range, as compared to the salary range paid in the private sector and in other governmental agencies for employees with comparable job titles/descriptions (based on, but not limited to, factors such as personnel managed, scope of responsibility, and skills required).
- B. Developing a repeatable methodology for fairly evaluating the competitiveness of salaries offered to the Study Positions, compared to salaries offered by private sector and other public sector employers. The methodology must also include a method to evaluate the monetary value of added benefits that include (but are not limited to): pensions, health plans, retirement plans, work from home, leave benefits (family, sick, vacation), parking, and any other job compensation, benefits, perks, or compensation. Must also include in the analysis the cost of living on Maui, including housing cost and availability, interest rates, inflation, and other relevant economic factors.
- C. Consulting with County of Maui's Mayor, Managing Director, and Department of Personnel Services to identify positions which have been difficult to fill and/or vacant, as well as the reasons for employees separating from service for any of the Study Positions.
- D. Making recommendations to the Salary Commission and the County based on the study's conclusions, on any insights gained or challenges uncovered, as well as suggestions for incentives that could be offered to County workers or potential County workers, along with recommendations for improving the competitiveness of salaries for those officers and employees in the Study Positions.
- E. Conducting project orientation meetings with the County, providing monthly updates to the Officer-in-Charge, and presenting findings to the Mayor, Managing Director, Salary Commission and other key stakeholders of the County.

2) Deliverables: The Contractor shall be responsible for the following:

- A. After consultation with the Department of Management, submit the list of positions to the Officer-in-Charge for review and approval.

- B. Draft Document and Reports.
- C. Provide preliminary findings and a draft report for internal review by the County within the timeline identified in Appendix A: Term/Schedule of Work or as agreed to by the County.
- D. Develop and Submit Final Project Report.
- E. Provide a final report that includes all items identified in this RFP section 2.2; Statement of Work, with County feedback.
- F. Provide all other deliverables mutually agreed to by Offeror and the County.
- G. Develop and conduct public presentations to present findings with Officer-in-Charge, the Mayor, Managing Director, Salary Commission and other key stakeholders of the County.

2.3. QUALIFICATIONS

Offeror must meet the following criteria to be considered for selection:

- A. The Offeror must have a minimum of five (5) years professional experience in conducting officer and employee classification and compensation studies for local governments and must have successfully completed at least three (3) previous studies for either: 1) a local government of municipality with a population of over one hundred and fifty thousand and a comparable cost of living to the County Maui; or 2) a local government or municipality located in the State of Hawaii. Studies under 1) and 2) may be added.
- B. The Offeror must submit a letter of recommendation from at least three state, county or municipal governments for which the Offeror has conducted a salary study within the previous five (5) years and, by submitting this bid, the Offeror certifies that at least one of the Offeror's principal researchers for each of these studies remains with the Offeror and will be assigned to work on or oversee the scope of work under this contract.
- C. The Offeror shall provide a list of its Contractor's assigned staff's qualifications and resumes for review and approval by the County.

Prior to award, upon the County's request, evidence of the above requirements shall be submitted. Offeror shall provide requested evidence within two (2) calendar days of the County's request. Failure to satisfy the requirements as specified shall be considered non-responsive and may result in rejection of the bid. Offeror may opt to submit the above requirements with their bid or prior to the deadline for offers.

PART 3: PROPOSAL REQUIREMENTS

The proposal is to be prepared in a manner as to provide a straightforward, concise delineation of the information requested. Proposals which contain false or misleading statements, or which do not support an attribute or condition claimed by the Offeror, may be cause for rejection of the proposal. If, in the sole opinion of the COM, such information was intended to mislead the COM in its evaluation of the proposal, it will be cause for rejection of the proposal.

3.1. REQUIRED FORMAT

Proposals shall be typed and not include any unnecessary or elaborate promotional material. Lengthy narrative is discouraged and presentations should be brief, concise and relevant to the services and statement of work requested. Proposal submittals shall be organized as set forth below and fulfillment of all proposal requirements listed is mandatory for consideration of proposals.

The Proposal shall include the following subsections:

- Letter of transmittal
- Offeror's Profile – Company Background, Experience, Key Personnel and Qualifications, and Past Performance
- Work Plan and Approach
- Cost
- References
- Appendices

All proposals must include a statement that proposals are valid for a minimum period of ninety (90) days subsequent to the submission deadline.

3.2. TRANSMITTAL LETTER

The Letter of Transmittal shall be included in the proposal submittal, and must, at a minimum, containing the following:

- A. Identification of Offeror, including name, address, email address, facsimile and telephone numbers.
- B. Acknowledgement of receipt of all RFP addenda, if any. Name, title, address, telephone number, and e-mail address of contact person during period of proposal evaluation.
- C. A statement to the effect that the proposal shall remain valid during the selection process.
- D. Name and signature of a person authorized to bind Offeror to the terms of the proposal and to negotiate contract price/terms on Offeror's behalf.

3.3. OFFEROR'S PROFILE

This section of the proposal shall describe the firm's qualifications and relevant experience. The Offeror should establish the ability to satisfactorily perform the required

statement of work by reasons of: experience in performing work of a similar nature; demonstrated competence and reliability in the services to be provided; strength and stability of the firm's resources; staffing capability; and supportive client references.

The Offeror shall:

- A. Provide a brief profile of the firm, including the types of services offered; the year founded; form of the organization (corporation, partnership, sole proprietorship); number, size and location of offices; and number of employees. Discuss the firm's financial strength, viability and stability.
- B. Identify the assigned team size and team members' experience it will use to provide the services. Biographical summaries of the key team members shall be included in the proposal. Identify the estimated hours and assignments/role of each assigned team member.
- C. Provide a description of the firm's experience in performing work of a similar nature.
- D. Identify subcontractors by company name, address, contact person, telephone number and project function. Describe Offeror's experience working with each subcontractor and information specific to the subcontractor's qualifications to perform the identified services.
- E. If subcontractors are to be used, the Contractor must take the following steps to assure that minority businesses, women's business enterprises, and labor surplus area firms are used when possible:
 - Placing qualified small and minority businesses and women's business enterprises on solicitation lists.
 - Assuring that small and minority businesses, and women's business enterprises are solicited whenever possible.
 - Dividing requirements by subcontractors, when economically feasible, into smaller tasks or quantities to permit maximum participation by small and minority businesses, and women's business enterprises.
 - Establishing delivery schedules, where the requirement permits, which encourage participation by small and minority businesses, and women's business enterprises.
 - Using the services and assistance, as appropriate, of such organizations as the Small Business Administration and the Minority Business Development Agency of the Department of Commerce.

3.4. WORK PLAN & APPROACH

Offeror shall provide a brief narrative addressing the Scope of Work requirements as described in this RFP and demonstrating the Offeror's understanding, ability, competence and reliability to accomplish these requirements in its work plan approach and methodology.

The Offeror shall provide a brief narrative:

- A. Demonstrating its understanding of the Scope of Work requirements.
- B. Discussing the method of performance, project organization and approach, and timeline demonstrating capability to successfully accomplish the Scope of Work.
- C. Detailing adequacy of labor resources. Indicate the number of full-time and part-time employees.
- D. Discussing any unique skills and attributes the Offeror may have to perform the Scope of Work. In addition, any limitations the Offeror may have regarding the performance of the Scope of Work shall also be described.
- E. Describing recent and past activities that show knowledge and experience with the scope of services as outlined, and activities in the County of Maui, State of Hawaii and the Hawaii Congressional Delegation.
- F. Offerors are encouraged to develop partnerships to accomplish the goals of this program through one entity. Only one proposal shall be submitted for a partnership being proposed, and the County of Maui will only receive invoices from one entity for payment.

3.5. COST

Offeror shall provide an itemized table of all anticipated costs associated with providing the Scope of Work and a narrative describing the overall use of funds. Expenditures shall be provided as a yearly budget and shall be inclusive of all direct and indirect expenses (i.e. personnel, administrative support, travel and travel-related expenses, office supplies and printing, miscellaneous costs, etc.). Budgets will be reviewed for reasonableness.

3.6. REFERENCES

Offeror shall provide a minimum of THREE (3) references, governing agencies and businesses, who shall attest to the effectiveness of the Offeror's services relating to the Scope of Work. Furnish the names of organizations, addresses, and contact information. The COM reserves the right to contact the references for additional information.

3.7. APPENDICES

Information considered by Offeror to be pertinent to this project and which has not been specifically solicited in any of the aforementioned sections may be placed into a separate appendix section.

3.8. PUBLIC RECORDS POLICY

Responses (proposals) to this RFP and the documents constituting any Contract entered into thereafter become the exclusive property of the County of Maui and shall be subject

to the HRS, Chapter 92F, Uniform Information Practices Act. The County of Maui's use and disclosure of its records are governed by this Act.

Those elements in each proposal that Offeror considers trade secrets or other proprietary data that the Offeror does not want to be subject to public inspection shall be prominently marked as "TRADE SECRET", "CONFIDENTIAL", or "PROPRIETARY" by Offeror. The County of Maui shall not in any way, be liable or responsible for the disclosure of any such records including, without limitation; those so marked if disclosure is deemed to be required by law or by any order of the Court.

Disclosure or nondisclosure by the County of confidential material shall be governed by HRS, Chapter 92F, Uniform Information Practices Act (Modified). Confidential data is normally restricted to financial information concerning the Offerors organization and data that qualifies as trade secret in accordance with the Uniform Trade Secrets Act (57-3A-1 to 57- 3A-7, NMSA 1978). **The price of products offered or the cost of services proposed shall not be designated as confidential information.**

All information contained in offers that do not comply with these instructions will be considered non-proprietary and subject to public disclosure upon request.

PART 4: SELECTION PROCESS

The County of Maui will evaluate all Proposals deemed to be responsive to the requirements of this RFP. Only proposals received by the stated deadline for receipt of proposals will be considered. Those proposals that have met the submission requirements shall be evaluated by a Selection Committee using the Evaluation Criteria identified in 4.1.

Evaluation of Proposals will be based on the qualifications and evaluation criteria outlined in the RFP. Brochures or other promotional presentations beyond that which is deemed sufficient to submit a complete and effective proposal are not desired. Elaborate artwork, expensive paper or binders, and expensive visuals are not necessary and will not affect the evaluation process.

Award of this contract shall be by competitive selection and given to the proposal whose overall capabilities will best meet the requirements as described in accordance with this RFP. The COM will evaluate each Proposal based on the "Best Value" concept. This means that the Proposal that optimizes quality, performance, cost and efficiency among responsible and responsible Offerors shall be selected for award. The COM, at its sole discretion, will determine which Proposal best satisfies its requirements.

4.1. EVALUATION CRITERIA

The total amount of points available for award is 100 points.

Proposals shall be evaluated using the following criteria:

<u>Attribute</u>	<u>Maximum Points</u>
Relevant Experience and Qualifications	45
Proposed Method of Performance, Project Approach and Reliability	35
Cost	15
Past Performance	5

Relevant Experience and Qualifications (45 Points)

Evaluation shall primarily consider the competence and abilities of professional staff and resources directly assigned to perform project scope of work, which includes but is not limited to: direct experience and relevant knowledge in performing work or work of a closely similar nature, demonstrated competence and reliability in the services to be provided and professional skills, training and capability to successfully perform project scope of work and accomplish RFP objectives. Evaluation shall also include strength, depth and stability of the firm's overall resources; degree of support from other relevant company resources that may be used indirectly; and firm's financial stability and viability.

Method of Performance, Project Approach and Reliability (35 Points)

Evaluation shall primarily consider, but is not limited to, depth of Offeror's understanding of the COM requirements and ability to accomplish the objectives as set forth within this RFP; flexibility and innovation in accomplishing the goals outlined; adequacy of direct resources assigned to perform scope of work; organization and management of project resources in its work plan approach; efficacy of work plan methodology; responsiveness to RFP and overall quality of work proposal.

Cost (15 Points)

The following formula will be used to evaluate the competitiveness and reasonableness of costs proposed:

$$\frac{\text{Price of Lowest Cost Proposal}}{\text{Price of Proposal Being Rated}} \times \text{Maximum Points for Cost (15)}$$

Past Performance (5 Points)

Evaluation of the past performance of the vendor will be considered.

4.2. EVALUATION AND AWARD OF CONTRACT

Awarding of contract for this RFP is subject to availability of funds. The contract may be cancelled without penalty to the COM in the event that sufficient funds are not appropriated.

The COM reserves the right to reject any and all proposals submitted. Proposals, in the sole opinion of COM, that are materially deficient in meeting the submission requirements of this RFP or have omitted materials, contain false or misleading statements that do not support an attribute or condition claimed by the Offeror, and/or contain such information intended to mislead the COM in its evaluation of the proposal, may be cause for rejection of the proposal at the sole discretion of COM.

The evaluation of Proposals by the COM Selection Committee may, at its option, involve the invitation of one or more Offerors to interview and/or make an oral presentation to the Selection Committee.

During these interviews/presentations, the Offeror will be allowed to present such evidence as may be appropriate in order that the Selection Committee can correctly analyze all materials and documentation submitted as a part of the Proposal.

The submittal of a Proposal does not guarantee that the Offeror will receive an interview; however, all responding firms will be contacted regarding the outcome of the evaluation and selection.

The COM reserves the right to make the selection of an Offeror based on any or all factors of value, whether quantitatively identifiable or not, including, but not limited to, the anticipated initiative and ability of the Offeror to perform the services and accomplish the desired goals as set forth herein.

The COM reserves the right to waive any requirements, both the COM's and those proposed by the Offeror; to negotiate for the modification of any proposal with mutual consent of the Offeror; to re-advertise for proposals, if desired; to sit and act as sole judge of the merit and qualifications of the service offered; and to evaluate in its absolute discretion, the proposal of each Offeror, so as to select the Offeror which best serves the requirements of the COM, thus providing that the best interest of the COM will be served. Offeror's past performance, and the COM's assurance that each Offeror will provide service as bid, will be taken into consideration when proposals are being evaluated.

The COM may make such investigation as it deems necessary to determine the ability of an Offeror to furnish the required services, and the Offeror will furnish to the COM all such information and data for this purpose as the COM may request. The COM reserves the right to reject any proposal if the evidence submitted by, or investigation of, such Offeror fails to satisfy the COM that such Offeror is properly qualified to carry out the obligations of a contract and to deliver the services contemplated herein or the bid of any bidder who has previously failed to perform properly, or complete on time, contracts of a similar nature. Any material misrepresentation or material falsification of information provided to the COM in the Offeror's proposal submission, or at any point in the proposal evaluation process, including any interview conducted, is grounds for rejection of the bid. In the event that the misrepresentation or falsification is not discovered until after any agreement is awarded, the agreement may be terminated at that time. A determination as to whether a misrepresentation or falsification of the bid submission is material shall be in the COM's sole discretion. The COM expressly reserves the right to reject the proposal of any Offeror who is in default on the payment of taxes, licenses, or other monies due the COM.

The COM reserves the right to conduct a background inquiry of each Offeror, which may include the collection of appropriate criminal history information, contractual and business associations and practices, employment histories, and reputation in the business community. By submitting a proposal to the COM, the Offeror consents to such an inquiry and agrees to make available to the COM such books and records as the COM deems necessary to conduct the inquiry.

Proposals may be accepted on evaluation without discussion. Prior to holding any discussions, a priority list shall be generated consisting of Proposals determined to be acceptable or potentially acceptable. If numerous acceptable and potentially acceptable Proposals are submitted, the evaluation committee may limit the priority list to three (3) highest ranked, responsible Offerors. The County may invite priority listed Offerors to discuss with their proposals to ensure thorough, mutual understanding. The County in its sole discretion shall schedule the time and location for these discussions, generally within the timeframe indicated in RFP Schedule and Significant Dates. The County may also conduct discussions with priority listed Offerors to clarify issues regarding the proposals before requesting Best and Final Offers, if necessary.

If deemed appropriate by the County in its sole discretion, the County may request each Offeror to submit its Best and Final Offer (BAFO). The request shall be issued via an Addendum, which will provide guidance and additional instructions. Offeror's BAFOs shall be submitted to the County through Public Purchase on or before the deadline called for. If an Offeror fails to do so, its last submitted Offer shall be deemed its BAFO. The BAFOs will be evaluated by the Evaluation Committee taking into consideration the Evaluation Criteria.

APPENDIX A: TERM/SCHEDULE OF WORK

The Contractor shall begin work required under this Agreement on the commencement date listed on the Notice-to-Proceed issued by the County and complete the work in accordance with the following project schedule, or as approved by the Officer-in-Charge, provided all work required to be performed under this Agreement shall be satisfactorily completed no later than **February 28, 2024**, unless extended by an amendment to the Agreement.

Estimated Project Schedule:

MILESTONE	DATE
Contract start date (tentative)	September 1, 2024
Monthly status reports	Ongoing
Preliminary Salary Study	December 31, 2024
Submission of a written report on the status of the Study to the Salary Commission and presentation of the report at a meeting of the Salary Commission, either in person or by interactive conference technology to address questions ("Preliminary Report and Presentation")	January, 31, 2025
Final Salary Study	February, 15, 2025
Report to the Salary Commission regarding Final Salary Study	February, 28, 2025
Contract Ends	March 31, 2025

BFED Committee

From: Michelle Santos <Michelle.Santos@co.maui.hi.us>
Sent: Wednesday, September 25, 2024 2:23 PM
To: BFED Committee
Cc: Andrea Rock-Mendes; Cynthia Razo; Cynthia Sasada; Josiah Nishita; Kainea Aiwohi; Pili Nahooikaika
Subject: Re: MT#10769-Bill 124
Attachments: MT#10769-BFED Committee.pdf

Sending attachments for this transmittal.

Thanks
Michelle

NOTE: PLEASE DO NOT FORWARD MY EMAIL TO ANYONE OUTSIDE OF THE COUNTY OF MAUI. YOU MAY CLICK ON THE ATTACHMENT ITSELF AND CREATE YOUR OWN EMAIL TO FORWARD THE DOCUMENT TO ANOTHER PERSON OUTSIDE OF THE COUNTY.

Michelle L. Santos

Office Operations Assistant

Office of the Mayor
County of Maui
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Wailuku, HI 96793
phone: (808) 270-7855
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>>> Michelle Santos 9/25/2024 10:15 AM >>>

NOTE: PLEASE DO NOT FORWARD MY EMAIL TO ANYONE OUTSIDE OF THE COUNTY OF MAUI. YOU MAY CLICK ON THE ATTACHMENT ITSELF AND CREATE YOUR OWN EMAIL TO FORWARD THE DOCUMENT TO ANOTHER PERSON OUTSIDE OF THE COUNTY.

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