

# **Area Agency on Aging of Palm Beach/Treasure Coast**

**Request for Proposal (RFP) No. 2022-002**

**Classification and Compensation Study**

| <b>Event</b>                    | <b>Date</b>       |
|---------------------------------|-------------------|
| Date RFP Issued                 | November 1, 2022  |
| Due date for proposer questions | November 18, 2022 |
| RFP Due Date                    | November 29, 2022 |

# **Area Agency on Aging of Palm Beach/Treasure Coast**

**RFP 2022-002**

## **Classification and Compensation Study**

### Advertisement

Proposals for a Classification and Compensation Study will be received by the Area Agency on Aging of Palm Beach/Treasure Coast at 4400 N. Congress Avenue, Suite 250, West Palm Beach, FL 33407 until November 29, 2022 at 2:30 pm.

An original, five (5) copies and **one (1) electronic copy (PDF format preferred) on a CD or flash drive** must be submitted in sealed envelopes/packages addressed to Area Agency on Aging of Palm Beach/Treasure Coast and marked **RFP 2022-002 Classification and Compensation Study**. Submittals received after that date and time will not be accepted or considered and will be retained unopened.

A complete bid package can be obtained by contacting the Area Agency on Aging of Palm Beach/Treasure Coast at 561-684-5885 or on our website at [www.aaapbtc.org](http://www.aaapbtc.org)

### Mail/Overnight/Hand Deliver Submittal Responses to:

**Area Agency on Aging of Palm Beach/Treasure Coast**

**4400 N Congress Avenue, Suite 250**

**West Palm Beach, FL 33407**

**Mark outside of envelope: RFP 2022-002 Classification and Compensation Study**

**Dated:**

**Published:**

# PART 1 - GENERAL INFORMATION

## 1.1. OVERVIEW

This Request for Proposal (RFP) provides guidelines for the submission of proposals in response to the Area Agency on Aging of Palm Beach/Treasure Coast's (Agency) solicitation for firms and individuals to provide a Classification and Compensation Study as described herein.

## 1.2. PROPOSERS' COSTS

The Agency shall not be liable for any costs incurred by Proposers in connection with preparation of a response to this RFP.

## 1.3. INQUIRIES

The Agency will not respond to oral inquiries. Interested proposers may contact the Agency regarding questions about the proposal at [hvath@aaapbtc.org](mailto:hvath@aaapbtc.org). The Agency will receive written requests for clarification concerning the meaning or interpretation of this RFP, until November 18, 2022. Questions shall be faxed or emailed with reference to the RFP number. All proposers are expected to carefully examine the proposal documents. Any ambiguities or inconsistencies should be brought to the attention of the Agency through written communication with the Agency prior to opening of the proposals.

Respondents may not contact any member of the selection committee, Agency employee or Agency Board member during this solicitation process. All questions or requests for clarification must be routed through the Agency at [hvath@aaapbtc.org](mailto:hvath@aaapbtc.org).

## 1.4. DELAYS

The Agency may delay scheduled due dates, if it is to the advantage of the Agency to do so. The Agency will notify proposers of all changes in scheduled due dates by written addenda.

## 1.5. QUALIFICATION SUBMISSION AND WITHDRAWAL

The Agency will receive all proposals at the following address:

**Area Agency on Aging of Palm Beach/Treasure Coast  
4400 N Congress Avenue, Suite 250  
West Palm Beach, FL 33407**

To facilitate processing, please mark the outside of the envelope as follows: **RFP 2022-002 Classification and Compensation Study**. The envelope shall also include the proposer's return address. Respondents shall submit one (1) original, five (5) copies and one (1) electronic copy (PDF format preferred) on a CD or flash drive of their proposal submittal in a sealed envelope marked as noted above. A proposer may submit the proposal by personal delivery, mail, or express shipping service.

**ALL PROPOSALS MUST BE RECEIVED BY  
2:30 P.M. ON TUESDAY, NOVEMBER 29, 2022**

Due to the irregularity of mail service, the Agency cautions proposers to assure actual delivery of mailed or hand-delivered proposals directly to the Agency's, as specified above, prior to the deadline set for receiving proposals. A proposal received by the Agency after the established deadline will be returned unopened to the proposer.

Proposers may withdraw their proposal submissions by notifying the Agency in writing at any time prior to the deadline for proposal submittal. Proposers may withdraw their submissions in person or by an authorized representative. Proposers and authorized representatives must provide the

letter of withdrawal, picture identification, proof of authorization (in the case of authorized representatives), and provide the Agency with a signed receipt for the withdrawn proposal. After the deadline, proposals once opened, become a public record of the Agency and are subject to the provisions of the Florida Public Records Law. As such they are subject to public disclosure in accordance with Chapter 119, Florida Statutes.

#### **1.6. ADDENDA**

If revisions become necessary, the Agency will provide written addenda. It is the responsibility of the proposer to obtain any addenda issued. The Agency will make every effort to notify registered Proposers by email that an addendum has been made to the RFP. The Agency shall not be responsible for providing notice of addenda to potential proposers who receive a RFP package from sources other than the Agency or Agency website. All addenda issued by the Agency must be acknowledged within the proposal at the time it is submitted to the Agency. Failure to acknowledge all addenda may result in disqualification.

#### **1.7. EQUAL OPPORTUNITY**

The Agency recognizes fair and open competition as a basic tenet of procurement and encourages participation by minority and women owned business enterprises.

#### **1.8. INSURANCE**

The successful professional shall not commence any work in connection with this agreement until it has obtained all of the following types of insurance and the Agency has approved such insurance. Nor shall the successful professional allow any subcontractor to commence work on its subcontract until all similar insurance required of the subcontractor has been so obtained and approved. All insurance policies shall be with insurers licensed and authorized to do business in the State of Florida. The successful professional shall maintain required insurance coverage for the full term of this agreement or for such longer periods as may be specifically required herein. All insurance policies shall be issued by companies authorized to do business under the laws of the State of Florida and rated no less than "B" as to management and no less than Class "VIII" as to strength in accordance with the A.M. Best Company Insurance Guide, or its equivalent as determined by the Agency in its sole discretion.

Loss Deductible Clause: The Agency shall be exempt from, and in no way liable for, any sums of money which may represent a deductible in any insurance policy. The payment of such deductible shall be the sole responsibility of the professional and/or subcontractor providing such insurance.

Worker's Compensation Insurance: The professional/service provider shall maintain during the life of this Agreement, Worker's Compensation Insurance for all of its employees connected with the work of this project that complies fully with the State of Florida Worker's Compensation Law, F.S. 440.

General Liability: The Proposer shall, during the life of this agreement take out and maintain broad form Commercial General Liability including but not limited to bodily injury, property damage, contractual liability, products and completed operations, and personal injury with limits of not less than \$1,000,000 per occurrence, \$1,000,000 aggregate covering all work performed under this Contract. Include broad form property damage (provide insurance for damage to property under the care custody and control of the contractor)

Business Automobile: The professional/service provider shall during the life of this agreement take out and maintain Business Automobile Liability form with coverage for symbol I (any auto) with limits of not less than \$1,000,000.00 combined single limit or \$500,000.00 per person/ \$1,000,000.00 per accident bodily injury and \$250,000.00 per accident property damage.

Certificates of Insurance: The Proposer, upon notice of award, will furnish Certificate of Insurance Forms. These shall be completed by the authorized Resident Agent and returned to the Agency. This certificate shall be dated and show:

- a) The name of the insured contractor, the specified job by name and job number, the name of insurer, the number of the policy, its effective date, and its termination date.
- b) Statement that the Insurer will mail notice to the Agency at least thirty (30) days prior to any material changes in provisions or cancellation of the policy.
- c) The Area Agency on Aging of Palm Beach/Treasure Coast is to be specifically included as an ADDITIONAL INSURED on General Liability Insurance and Business Automobile Liability Insurance.
- d) The Area Agency on Aging of Palm Beach/Treasure Coast shall be named as Certificate Holder. Please Note that the Certificate Holder should read as follows:

**Area Agency on Aging of Palm Beach /Treasure Coast  
4400 N Congress Avenue, Suite 250  
West Palm Beach, FL 33407**

- e) No Agency Division, Department, or individual name should appear on the certificate. NO OTHER FORMAT WILL BE ACCEPTABLE.
- f) The "Acord" certification of insurance form should be used.

#### **1.9. PUBLIC ENTITY CRIMES**

A person or affiliate who has been placed on the convicted vendor list following a conviction for a public entity crime may not submit proposals or contract with the Agency for construction of a public building or public works; may not submit bids for leases of real property to a public entity; may not be awarded or perform work as a contractor, supplier, subcontractor, or consultant under a contract with any public entity; and may not transact business with any public entity in excess of the threshold amount provided for in s. 287 for CATEGORY TWO for a period of 36 months from the date being placed on the convicted vendor list. Questions regarding this statement should be directed to the State of Florida, Bureau of State Procurement (850) 488-8440.

#### **1.10. SUSPENDED VENDOR**

An entity or affiliate who has been placed on the State of Florida Suspended Vendor List will not be considered for award. The Suspended Vendor List is available on the State's website at:

[http://dms.myflorida.com/business\\_operations/state\\_purchasing/vendor\\_information](http://dms.myflorida.com/business_operations/state_purchasing/vendor_information)

#### **1.11. ASSIGNMENT & SUBCONTRACTING**

The successful proposer will not be permitted to assign its contract with the Agency or to subcontract any of the work requirements to be performed.

#### **1.12. PUBLIC RECORDS**

Proposals become "public records" and shall be subject to public disclosure consistent with Chapter 119.07 Florida Statutes. Document files may be examined, during normal working hours by appointment. Requested information in this RFP will not be considered confidential and/or proprietary.

All documents and other materials made or received in conjunction with this project will be subject to public disclosure requirements of chapter 119, Florida Statutes. The proposal will become part

of the public domain upon opening. Vendors shall not submit pages marked “proprietary” or otherwise “restricted”.

**1.13. PUBLIC RECORDS LAW: Public Records Relating to Compliance, Request for Records; Noncompliance, & Civil Action**

**NOTE: IF THE PROPOSER HAS QUESTIONS REGARDING THE APPLICATION OF CHAPTER 119, FLORIDA STATUTES, TO THE PROPOSER’S DUTY TO PROVIDE PUBLIC RECORDS RELATING TO THIS AGREEMENT, CONTACT THE CUSTODIAN OF PUBLIC RECORDS AT:**

Public Records Coordinator  
Area Agency on Aging of Palm Beach/Treasure Coast, Inc.  
4400 N. Congress Avenue  
West Palm Beach, Florida 33407  
561-684-5885 [lhady@aaapbtc.org](mailto:lhady@aaapbtc.org)

In compliance with F.S. 119.0701 the Proposer shall:

- a) Keep and maintain public records required by the public agency to perform the service.
- b) Upon request from the public agency’s custodian of public records, provide the public agency with a copy of the requested records or allow the records to be inspected or copied within a reasonable time at a cost that does not exceed the cost provided in this chapter or as otherwise provided by law.
- c) Ensure that public records that are exempt or confidential and exempt from public records disclosure requirements are not disclosed except as authorized by law for the duration of the contract term and following completion of the contract if the Proposer does not transfer the records to the public agency.
- d) Upon completion of the contract, transfer, at no cost, to the public agency all public records in possession of the Proposer or keep and maintain public records required by the public agency to perform the service. If the Proposer transfers all public records to the public agency upon completion of the contract, the Proposer shall destroy any duplicate public records that are exempt or confidential and exempt from public records disclosure requirements. If the Proposer keeps and maintains public records upon completion of the contract, the Proposer shall meet all applicable requirements for retaining public records. All records stored electronically must be provided to the public agency, upon request from the public agency’s custodian of public records, in a format that is compatible with the information technology systems of the public agency.

A request to inspect or copy public records relating to a public agency’s contract for services must be made directly to the public agency. If the public agency does not possess the requested records, the public agency shall immediately notify the Proposer of the request, and the Proposer must provide the records to the public agency or allow the records to be inspected or copied within a reasonable time.

If a Proposer does not comply with the public agency’s request for records, the public agency shall enforce the contract provisions in accordance with the contract.

A Proposer who fails to provide the public records to the public agency within a reasonable time may be subject to penalties under F.S. [119.10](#).

If a civil action is filed against a Proposer to compel production of public records relating to a public agency's contract for services, the court shall assess and award against the Proposer the reasonable costs of enforcement, including reasonable attorney fees, if:

1. The court determines that the Proposer unlawfully refused to comply with the public records request within a reasonable time; and
2. At least 8 business days before filing the action, the plaintiff provided written notice of the public records request, including a statement that the Proposer has not complied with the request, to the public agency and to the Proposer.

A notice complies with subparagraph 2 above, if it is sent to the public agency's custodian of public records and to the Proposer at the Proposer's address listed on its contract with the public agency or to the Proposer's registered agent. Such notices must be sent by common carrier delivery service or by registered, Global Express Guaranteed, or certified mail, with postage or shipping paid by the sender and with evidence of delivery, which may be in an electronic format.

A Proposer who complies with a public records request within eight (8) business days after the notice is sent is not liable for the reasonable costs of enforcement.

#### **1.14. TAXES & LICENSES**

Proposer shall, at his own expense, pay all licenses, fees and taxes on labor, insurance benefits, vacations, holidays, and all manner of other charges, levies or fees of every description, and comply with all local ordinances, state and federal laws, rules and regulations applicable to business to be carried on under this contract.

#### **1.15. BACKGROUND INFORMATION**

As part of the evaluation process, the Agency reserves the right, to require a Proposer to submit such evidence of his/her qualifications as it may deem necessary, and may consider any evidence available to it as to the qualifications and abilities of the Proposer, including past performance (experience) with the Agency by the Proposer or any of their Owners.

#### **1.16. REFERENCES/RECORD CHECK**

As part of the evaluation process, the Agency may conduct an investigation of references, including but not limited to, a record check of consumer affairs complaints. Proposer's submission of their RFP constitutes acknowledgment of the process and consent to investigate. Agency is the sole judge in determining Proposer's qualifications.

#### **1.17. COMPETENCY OF RESPONDENTS**

Proposals will be considered only from firms which are regularly engaged in the business of providing the goods and/or services as described in this RFP and who can provide evidence that they have established a satisfactory record of performance to insure that they can satisfactorily execute the services under the terms and conditions stated herein. The term "equipment and organization" as used herein shall be construed to mean a fully equipped and well established company in line with the best business practices in the industry and as determined by the proper authorities of the Agency.

#### **1.18. PERFORMANCE EVALUATION**

Throughout the contract period the vendor(s) performance will be monitored by Agency staff. If vendor performance fails to meet the standards specified and receives an unacceptable rating, the Agency may without cause and without prejudice to any other right or remedy, terminate the contract whenever the Agency determines that such termination is in the best interest of the Agency. Vendor's receiving an unacceptable rating will be notified by certified mail.

### **1.19. REJECTION OF PROPOSALS**

The Agency reserves the right to accept or reject any or all proposals, part of proposals, and to waive minor irregularities or variations to specifications contained in proposals, and minor irregularities in the proposal process.

### **1.20. CONFLICT OF INTEREST**

The Proposer covenants that they presently have no interest and shall not acquire any interest, directly or indirectly, which would conflict in any manner or degree with the performance of the services hereunder. The Proposer further covenants that no person having any such known interest shall be employed or conveyed an interest, directly or indirectly, in the contract.

### **1.21. CONE OF SILENCE**

A Cone of Silence shall be in effect during the Competitive Solicitation beginning upon the advertisement for requests for proposals, requests for qualifications and competitive bids. The Cone of Silence shall continue through the negotiation phase for requests for proposals and requests for qualifications.

The Cone of Silence shall terminate at the time the Agency Board of Directors or Chief Executive Officer makes final award of a bid or gives final approval of a contract or contract amendment, rejects all bids or responses to the Competitive Solicitation, or takes other action in the Competitive Solicitation.

Any person or entity that seeks a contract, contract amendment, award, recommendation, or approval related to a Competitive Solicitation or that is subject to being evaluated or having its response evaluated in connection with a Competitive Solicitation, including a person or entity's representative shall not have any communication with any Agency Board Member, the Chief Executive Officer and their respective support staff or any person or group of persons appointed or designated by the Agency to evaluate, select, or make a recommendation regarding a Competitive Solicitation.

Any action in violation of this section shall be cause for disqualification of the bid or the proposal. The determination of a violation shall be made by the Chief Executive Officer.



## PART 2 - STATEMENT OF WORK

### 2-1. BACKGROUND

The Area Agency on Aging of Palm Beach/Treasure Coast serves clients in a five-county region with one office located in Port St. Lucie and the main office located in West Palm Beach. The Chief Executive Officer oversees 65 employees in various positions.

The following is a list of current position titles in the Agency.

| Title  | Exempt |
|--|--------|
| Accounting Specialist                            | No     |
| Benefits Coordinator                             | Yes    |
| Call Center Specialist                           | No     |
| CCE Intake Specialist                            | No     |
| Compliance And Quality Assurance Manager         | Yes    |
| Controller                                       | Yes    |
| Data Quality Assurance Analyst                   | Yes    |
| Director Of Agency Compliance                    | Yes    |
| Director Of Communications                       | Yes    |
| Director Of Helpline                             | Yes    |
| Director Of Planning And Consumer Services       | Yes    |
| Elder Rights                                     | Yes    |
| Executive Assistant                              | Yes    |
| FGP Volunteer Coordinator                        | Yes    |
| Fiscal Analyst                                   | No     |
| Grants Accountant                                | Yes    |
| Healthy Living Coordinator                       | No     |
| Healthy Living Facilitator                       | No     |
| Healthy Living Manager                           | Yes    |
| Help Desk Technician                             | No     |
| Helpline Manager                                 | Yes    |
| Human Resources Generalist                       | Yes    |
| Information & Referral Coordinator               | No     |
| Information & Referral Specialist                | No     |
| Information & Referral Supervisor                | Yes    |
| Intake Coordinator                               | No     |
| Intake Supervisor                                | Yes    |
| IT Technical Manager                             | Yes    |
| Medicaid Coordinator                             | No     |
| Medicaid Intake Specialist                       | No     |
| Medicaid Manager                                 | Yes    |
| Medicaid Specialist                              | No     |
| Outreach Coordinator                             | No     |
| Program Compliance and Quality Assurance Monitor | Yes    |
| Receptionist                                     | No     |
| Shine Liaison                                    | Yes    |

## 2-2. PERSONNEL AND COMPENSATION

The Agency has a total of 56 full-time and 14 part time budgeted positions. The Agency job classifications include 22 exempt and 16 non-exempt positions.

The Agency's fiscal year is from January 1 through December 31.

### Additional Information

- The turnover rate has hovered around 7% for several years.
- Job descriptions are reviewed and updated upon request, upon reclassification, and as positions are vacated – before recruitment commences.
- Positions are reevaluated upon department request due to change in operational need, duties and responsibilities. Requests are made during the budget process, however most are done throughout the year.
- There is no bonus or incentive program in place.
- Agency policy dictates hiring new employees at the minimum of the pay range. Directors can request approval from the Chief Executive Office and Chief Financial Officer to hire above the minimum. Considerations for these requests include prior work experience, education, certifications, training, as well as the pay of other Agency employees in the same classification and/or pay range and each employee's years of service.

### Rate Increase History

|            |    |                          |
|------------|----|--------------------------|
| 01/01/2021 | 2% | except Senior Management |
| 01/01/2022 | 5% |                          |
| 03/28/2022 | 6% |                          |

## 2-3. SCOPE OF WORK

This project shall include, but is not limited to the following. The consultant may propose additions or alternative tasks deemed necessary to complete the scope of work.

### Scope A – Job Classification

- A-1 Conduct a job audit of positions, including general task analysis by the Senior Manager. This review may include interviews with Senior Managers and other key personnel and/or employees to determine the essential functions of each position.
- A-2 Assign all jobs to salary grades based on an objective evaluation of compensable factors related to the duties and responsibilities of the individual job.
- A-3 Refine job classifications/titles to accurately represent job duties and responsibilities as necessary. Review supervisor/management titles and recommend titling structure which defines consistent levels of responsibility across the organization.
- A-4 Review a sampling of existing job descriptions and recommend updates, as needed, including requirements of education, experience, knowledge, skills, and abilities.
- A-5 Provide methodology for evaluating the classification of positions/jobs on an ongoing basis.
- A-6 Assess FLSA designation for select positions.

### Scope B – Compensation

- B-1 Review the current pay grade and salary ranges of Agency positions, including recommending appropriate salary ranges based on compensation survey and study results and appropriate salary range for each position.

- B-2 Conduct interviews, as necessary for the purpose of clarifying and determining project scope, and selection of entities to be surveyed.
- B-3 Determine the appropriate labor markets for the study and determine existence of relevant salary survey data.
- B-4 Develop and conduct an external compensation survey comparing benchmark positions with local government and private sector entities in order to identify the Agency's competitive position in the regional labor market. This compensation survey shall include the actual salaries and tenure in position of employees in said benchmark positions, with anomalies identified.
- B-5 Conduct internal pay equity assessment of benchmark positions based upon actual work performed, value of work performed to the organization, and length of service with consideration of merit increase history.
- B-6 Recommend alignment of pay grades and salary ranges of benchmark positions in order to achieve competitiveness in regional labor market, and internal equity.
- B-7 Review existing pay practices and policies at the Agency and provide recommendations based upon analysis of external market competitiveness and internal equity.
- B-8 Provide financial impact of the recommended salary alignments and changes to pay practices.
- B-9 Provide methodology for maintaining and updating the proposed new/modified compensation system.

Note: This study will not include a review of the Agency provided health insurance, life insurance, accrued leave, paid holidays, retirement plans and other employer benefits.

#### **2-4. DELIVERABLES REQUIRED**

1. Submit a detailed outline of the tasks and a timeline for completion (completion date should be no later than 120 days from date of award) of all tasks for the classification and compensation study.
2. Bi-weekly updates shall be provided to the Chief Financial Officer via email and/or telephone.
3. The consultant may be required to make a presentation to the Agency within 120 days from date of award.
4. The written report should include at minimum the research performed, methodology, compensation philosophy, findings and recommendations, policy updates based on recommendations, proposed pay plan, and implementation cost projection.

#### **2-5. AGENCY RESPONSIBILITIES**

The Agency will provide the consultant with all relevant information it has pertaining to the Agency and its operations including existing job descriptions, organizational charts, current pay grade schedules. The Agency may provide additional documents and information as requested and appropriate.

The Agency staff team is as follows:

- Project Team – Chief Executive Officer, Chief Financial Officer, and Human Resources Generalist

## PART 3 - EVALUATION OF SUBMISSIONS

### **EVALUATION METHOD AND CRITERIA**

The Agency reserves the right to evaluate each response on a separate and individual basis. The Agency further reserves the right to reject any and all responses submitted, or accept a response deemed most advantageous to the Agency. While the Agency desires to achieve a cost effective analysis, the emphasis is on quality, not necessarily the lowest cost. The Agency's selection committee will evaluate proposals and will select the proposer which meets the best interests of the Agency. The Agency shall be the sole judge of its own best interests, the proposals, and the resulting negotiated agreement.

An Evaluation Committee composed of five (5) Agency staff shall meet to evaluate each response in accordance with the requirements of this solicitation. Each Committee member will rank all proposals based on the criteria below. The top ranked firms may be required to provide a presentation to the selection committee. The selection committee will recommend award to the top ranked firm.

The Agency's decisions will be final. This criterion shall be utilized in the evaluation of the proposals. The Agency's evaluation criteria will include, but not be limited the following:

- Firm Qualifications
- Project Manager and Staff Experience
- Understanding of the Scope of Services
- Price Proposal
- Quality of submittal

**Selection:** Proposals will be evaluated using the above criteria. The Agency will assign this task to a Selection Committee. The Area Agency on Aging of Palm Beach/Treasure Coast reserves the right to select the most qualified individuals/firms from review of the packages submitted or to interview the most qualified Respondents prior to requesting authorization to negotiate an agreement with the highest ranked respondents. Individuals/firms will be notified in writing if they are selected for interview. Notices for interviews will contain explicit instructions concerning location, date, time and length of interviews.

**Presentations:** The Agency may require oral and visual presentations. This shall be done at the Agency's sole discretion when it feels presentations are essential as part of the evaluation process and are in the best interests of the Agency. The Agency shall be the sole judge and final arbiter of its own best interests in this matter.

**Terms and Conditions:** Any actual or prospective Proposer who disputes the reasonableness, necessity or competitiveness of the terms and conditions of this request for proposals; selection or award recommendation shall file such dispute in writing with the Chief Executive Officer, not later than close of business on the proposal opening date, as to the terms and conditions, and within ten (10) days of award recommendation. The Agency reserves the right to reject any or all proposals without recourse, to waive technicalities and informalities or to accept the proposal which in its sole judgment best serves the interest of the Agency.

## PART 4 - INSTRUCTIONS FOR PREPARING SUBMISSIONS

### 4-1. RULES FOR SUBMISSIONS

The submission must name all persons or entities interested in the submission as principals. The proposal must declare that it is made without collusion with any other person or entity submitting a proposal pursuant to the RFP. The interested firm or individual must submit one (1) original, five (5) copies and **one (1) electronic copy (PDF format preferred) on a CD or flash drive** of their proposal. Please tab all support documents or attachments according to the order established in the following paragraph.

#### **IMPORTANT NOTE:**

To expedite the evaluation of responses, it is mandatory that all respondents follow the format and instructions contained herein. The Agency retains the option to reject any response that does not conform to the stated requirements.

### 4-2. PROPOSAL FORMAT

Proposers should prepare their proposals using the following format. Proposers shall label, tab and organize proposal submittal documents utilizing the following format as outlined below. All attachments as requested shall be inserted in the back of each corresponding section.

In preparing your proposal, proposer should assume that the Agency has no previous knowledge of their product or capabilities. Each response shall be prepared simply and economically, providing a straightforward and concise description of the respondent's capabilities regarding the specific work to be performed pursuant to this solicitation. Emphasis should be concentrated on conformance to the solicitation instructions, responsiveness to the solicitation requirements, and on completeness and clarity of content.

All abbreviations and acronyms used in the response shall be kept to a minimum and defined upon their first usage. Page size shall be 8.5 x 11 inches, foldouts are not acceptable. The text size should be 11 point or larger using Arial or Times New Roman font only.

Letter of Transmittal: The response format shall contain a letter of transmittal. The Letter of Transmittal will summarize in a brief and concise manner the Proposer's understanding of the scope of work and make a positive commitment to timely perform the work. Provide a statement indicating the respondent's interest in, knowledge of, and resources necessary to provide the services described in this RFP. An agent authorized to contractually bind Proposer must sign the Letter of Transmittal indicating the agent's title or authority. The transmittal letter shall not exceed two pages in length.

#### Tab 1 ~ Corporate Structure and Location

Firms shall provide a brief profile of their company, which should include their history, locations of their corporate and satellite offices, location of their project team, corporate structure, ownership interest, and the length of company's existence.

#### Tab 2 ~ Project Experience

Indicate the company's number of years of experience in providing consultant services in the State of Florida. Describe company experience assisting clients with the design and development of compensation and classification plans. List all Florida Clients within the last five years with agency name and dates of contract (from and to).

Provide a list of current clients with expected project deadlines within the next 6 months.

### Tab 3 ~ Primary Consultant Experience

The Project Manager shall have at least ten (10) combined years of management consultant experience in compensation and classification and must have at least ten (10) years of experience with the knowledge, skills and abilities to successfully perform the duties and tasks that are typically related to the work described in this RFP. The Project Manager must be an employee of the respondent for the last three (3) years.

Provide resumes for Project Manager and Project Staff. Project Manager and Staff profiles submitted in the proposal must be utilized for the services proposed. The Agency must approve any replacement staff during the course of the engagement. Resume shall include education, number of years of experience and any other pertinent information necessary to convey the quality of the individual(s) assigned to this project.

Provide an overview of the firm's services and experience in performing the Statement of Work described in this RFP. (Promotional materials should not be included.)

### Tab 4 ~ Scope of Work

1. Provide a statement describing the Scope of Work as you understand it, and provide a detailed breakdown and description of the specific steps, services, methods, and study products that will be employed to gather the data, analyze the findings, develop recommendations, and coordinate implementation as requested. Firms may elect to include in this section any innovative methods or concepts that might be beneficial to the Agency as long as the minimum requirements are met.
2. Describe your firm's understanding of economic conditions and labor market for the region.
3. Describe the factors taken into consideration when reviewing and/or developing compensation, classification and related plans.
4. Describe the manner in which comparator entities in which to survey will be identified and recommended.
5. Describe the manner in which benchmark positions would be selected when analyzing classifications.
6. Describe the interaction between the consultant and staff during data collection.
7. Describe the way in which the work product will be structured and presented upon completion.

### Tab 5 ~ Timetable

Provide the anticipated start and completion date for the project and estimated dates for the fulfillment of each work phase and task. This proposed project timetable will be used as the basis for the project timetable to be included in the project contract. The Agency anticipates that the successful consultant will be awarded the contract by January 1, 2023. Agency's desired completion of the study and delivery of the work product no later than April 1, 2023.

### Tab 6 ~ Compensation Schedule

Price Proposal Form. Pricing is all inclusive, including travel expenses, clerical and all other expenses.

Tab 7 ~ Work Examples

Provide the following in this section:

1. Provide an example final work product for a similar type project.

Tab 8 ~ Insurance

Provide a statement agreeing to obtain (prior to award) Insurance with coverages as detailed in the RFP. A certificate of insurance indicating that the firm has coverage in accordance with the requirements herein set forth may be furnished by the firm to the Agency along with their qualification data. A properly completed Accord Form is preferable. The Area Agency on Aging of Palm Beach/Treasure Coast must be named as an additional insured for all General Liability prior to entering into a contract.

Tab 9 ~ Submittals / Forms

1. Conflict of Interest Form
2. Public Entity Crimes Form

Tab 10 ~ Optional Information

Provide any information pertinent to this project that will provide insight to the evaluators about the qualifications, fitness and abilities of the Respondent (please limit this information to two pages).

Tab 11 ~ Addenda (if applicable)

All addenda issued pursuant to this solicitation must be acknowledged and submitted as part of the proposal package.

## PART 5 – FORMS

### PRICE PROPOSAL FORM

Respondents are to make no changes to the table below and are to fill the table out completely.

| <b>Description of Services</b>              | <b>Amount</b>        |
|---|----------------------|
| Classification and Compensation Study       | \$ _____<br>Lump Sum |
| Hourly schedule for any additional services |                      |
| Position                                    | Hourly Rate          |
|   |                      |
|   |                      |
|   |                      |
|   |                      |

The consultant may be required to provide additional services. Provide a separate hourly fee schedule to be included in the cost proposal. The Respondent certifies that as a condition of submitting, firm will hold good his proposal prices for a minimum period of sixty (60) calendar days from the date proposals are opened.

The undersigned Respondent hereby certifies that the terms and conditions, including but not limited to, the statement of work have not been altered or modified in any manner. Any modification to this solicitation by the proposer will result in Proposer's response being found non-responsive and thereby disqualified.

I certify that this Proposal is made without prior understanding, agreement, or connection with any corporation, firm, or person submitting a Proposal for the same materials, supplies, or equipment, and is in all respects fair and made without collusion or fraud. I agree to abide by all conditions of this Proposal and certify that I am authorized to sign this Proposal for the Proposer.

Company Name \_\_\_\_\_

\_\_\_\_\_  
(Signature)

\_\_\_\_\_  
(Printed Name)

\_\_\_\_\_  
Name of Company

\_\_\_\_\_  
(Printed Title)

\_\_\_\_\_  
Telephone Number

\_\_\_\_\_  
Email Address



## Public Entity Crimes Form

### NOTIFICATION OF PUBLIC ENTITY CRIMES LAW

Pursuant to Section 287.133, Florida Statutes, you are hereby notified that a person or affiliate who has been placed on the convicted contractors list following a conviction for a public entity crime may not submit a proposal on a contract to provide any goods or services to a public entity; may not submit a proposal on a contract with a public entity for the construction or repair of a public building or public work; may not submit proposals on leases or real property to a public entity; may not be awarded or perform work as a contractor, supplier, sub-Proposer, or consultant under a contract with any public entity; and may not transact business with any public entity in excess of the threshold amount provided in Section 287.017 [F.S.] for Category Two [\$35,000.00] for a period of thirty-six (36) months from the date of being placed on the convicted contractors list.

Acknowledged by:

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Company Name

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Signature

---

Name and title (Print or Type)

---

Date

## Conflict of Interest Disclosure Form

The award of this contract is subject to the provisions of Chapter 112, Florida Statutes. All Proposers must disclose within their proposal: the name of any officer, director, or agent who is also an employee of the Area Agency on Aging of Palm Beach/Treasure Coast.

Furthermore, all Proposers must disclose the name of any Agency employee who owns, directly or indirectly, an interest in the Proposer's firm or any of its branches.

The purpose of this disclosure form is to give the Agency the information needed to identify potential conflicts of interest for key personnel involved in the award of this contract.

The term "conflict of interest" refers to situations in which financial or other personal considerations may adversely affect, or have the appearance of adversely affecting, an employee's professional judgment in exercising any Agency duty or responsibility in administration, management, instruction, research, or other professional activities.

Please check one of the following statements and attach additional documentation if necessary:

\_\_\_\_\_ To the best of our knowledge, the undersigned firm has no potential conflict of interest due to any other Cities, Counties, contracts, or property interest for this proposal.

\_\_\_\_\_ The undersigned firm, by attachment to this form, submits information which may be a potential conflict of interest due to other Cities, Counties, contracts, or property interest for this proposal.

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Company Name

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Signature

---

Name and title (Print or Type)

---

Date