

Request for Proposals

RFP 09-1718

Classification and Compensation Study



Released: August 10, 2017

Purchasing and Contracts Branch
2201 E. Market Street
Long Beach, CA 90805-5556
Phone (562) 663-3001
E-mail: toconnor@lbschools.net



1. INTRODUCTION

The Long Beach Unified School District (District) is initiating the process of identifying and selecting a consultant to conduct a one-time comprehensive classification and compensation study of approximately 940 employees in three classifications. The purpose of this Request for Proposal (RFP) is to obtain information from qualified consultants (Consultants) that we deem as pertinent to our decision making process and to collect such information in a uniform format from all Consultants.

a) District Contact

The District contact (Contact) for this RFP is the sole point of contact for this procurement. All communication shall be in writing and submitted to the Contact as designated below. Consultants are not permitted to communicate with other District staff or officials about this RFP, except during pre-proposal meetings and/or interviews, unless otherwise directed by the Contact. Direct written questions and/or correspondence related to this RFP to:

Contact: Terri O'Connor, Contract Analyst
E-Mail: toconnor@lbschools.net

Consultants interested in participating in this RFP should immediately provide the Contact with a telephone number and an e-mail address for dissemination of addenda and/or supplemental information, as applicable. Failure to provide said contact information may result in late notifications and/or incomplete proposals.

b) Deadline for Submitting Questions

Any questions regarding the RFP must be submitted to the Contact referenced above, **by e-mail, no later than August 17, 2017 by 12:00 p.m.** Reference the RFP Number and Title when making inquiries. Inquiries submitted by the inquiry submittal deadline will receive a response from the District no later than August 24, 2017.

c) RFP Schedule

- 1) RFP Deadlines
RFP Released..... August 10, 2017
Deadline for Submitting Questions..... August 17, 2017 by 12:00 p.m.
Response to Questions..... August 24, 2017 by 4:00 p.m.
Deadline for Submitting Proposals..... August 31, 2017 at 2:00 p.m.
- 2) RFP Tentative Scheduling
Evaluation Completed..... September 2017
Board Approval Recommendation..... September 2017



2. BACKGROUND

Established in 1885, the Long Beach Unified School District (LBUSD) educates about 75,000 students in 84 public schools located in the cities of Long Beach, Lakewood, Signal Hill, and Avalon on Catalina Island. The third largest school district in California, LBUSD serves one of the most diverse large cities in the United States.

The last comprehensive classification and compensation study of incumbents in these classifications was conducted in 1994. The classification specification shared by the three classes of Instructional Aide - Special, Bilingual Spanish, and Bilingual Khmer was created in 1994. Minor revisions to the class specification were completed in 2002, 2007 and 2009. Please note that "IA-Specials" may be assigned to any education level (elementary, middle or high) in any special education classroom including Mild to Moderate, Moderate to Severe, Autism Focus, Emotional Disability, Deaf/Hard of Hearing, or Physical Health Impairment. While there are some benefitted positions, the majority of positions are 3.75 hours per day with no benefits. Incumbents in these positions are represented by the California School Employees Association (CSEA) Chapter 2.

3. BASE SCOPE OF SERVICES

Refer to Exhibit I for Base Scope of Services.

4. PROPOSAL SUBMISSION

The deadline for submitting a proposal is **August 31, 2017 at 2:00 p.m.** **Four (4) copies** of the proposal shall be submitted in a sealed envelope/carton. One (1) of the copies shall be unbound and marked "Master" and shall contain original signatures in all locations requiring a signature.

Proposals must be submitted in a sealed envelope/carton and shall state the Consultant's name and address, and shall be clearly addressed as follows:

LBUSD Purchasing and Contracts Branch
RFP 09-1718 Classification and Compensation Study
2201 E. Market Street
Long Beach, CA 90805-5556

The proposals may be mailed or delivered in person during the business hours of 7:30 a.m. to 4:10 p.m., Monday through Friday. It is the Consultant's responsibility to ensure that the proposals arrive on or before the specified time. The District will not be responsible for proposals not properly marked and delivered. Postmarks will not be accepted in lieu of actual receipt. **Any proposals received after August 31, 2017 at 2:00 p.m. will be returned unopened.**

5. PROPOSAL FORMAT

This section should establish the ability of the Consultant to satisfactorily perform the required work by reasons of demonstrated competence in the services to be provided; the nature and relevance of similar work currently being performed or recently completed; competitive advantages over other firms in the same industry; strength and stability as a business concern; and supportive client references.



Proposals are to be prepared in such a way as to provide a straightforward, concise description of capabilities to satisfy the requirements of this RFP. Each section of the proposal shall be tabbed according to the numbering system as follows:

TAB - 1 Cover Letter

The Cover Letter shall be on company letterhead, signed by an authorized officer, employee, or agent of the Consultant. The Cover Letter shall include the following information:

- a. A statement that the Proposal is submitted as a response to this RFP 09-1718 Classification and Compensation Study.
- b. Background information about Consultant, including date of founding, legal form (corporation, partnership, etc.), number and location of officers, principal line of business, number of employees, days/hours of operation and any other pertinent data.
- c. Consultant's most noteworthy qualifications for providing the required services to the District. Specifically, highlight those qualification that distinguish Consultant from the competitors.
- d. A statement that Consultant has read and understands the RFP in its entirety, including, without limitation, the scope and nature of the work, all appendices, attachments, exhibits, schedules, and addenda, as applicable. Should the Consultant have any objections to the RFP, they must be clearly stated in the cover letter, specifically referencing the particular section number, paragraph, and page number of the objection. However, making an objection does not relieve the Consultant from complying with the requirements of the RFP.

TAB - 2 Approach to the Scope of Services

Describe the approach and methodology to performing the work, in addition to:

- a. Understanding of the District's objectives and requirements
- b. Clearly and concisely, outline the plan for accomplishing the specified services, assuming an estimated time schedule of October 2017 start and a no later than May 2018 completion
- c. Describe how the work shall be accomplished and satisfy the District's objectives
- d. Issues pertinent to this RFP that are not addressed in the Scope of Services

TAB - 3 Consultant Team

Identify the project manager and principal staff who will be performing the work required. Provide a work history résumé for the project manager, including applicable training, licensing, and/or certifications, descriptions of projects worked upon, dates, project costs, and duties performed by the individual on the projects.

TAB - 4 References

Provide a list of at least four (4) business clients, preferably the same size as LBUSD, who can independently evaluate Consultant's expertise in this area. Include the names of the organizations, contract beginning and end dates, and names, titles, and telephone numbers of individuals who the District may contact as references for Consultant.



TAB - 5 Fee Proposal

- a. Attach a proposal disclosing all charges, including travel and other out-of-pocket expenses, and declare the Consultant's preference for payment method and billing.

TAB - 6 Addenda

Include signed addenda in chronological order, as applicable.

6. SELECTION PROCESS

A selection committee, made up of District staff, will make final recommendations to the Board of Education. The District reserves the right to reject any and all proposals and to make its selection on a discretionary basis. However, the selection committee will evaluate proposals primarily on the following criteria:

Phase I	
Experience and Qualification of Firm and Personnel	35 Points
Capacity and Organizational Depth	30 Points
Work Plan/Project Approach and Understanding of Scope of Services	15 Points
Price/Cost Proposal	20 Points
Phase II	
Interview/Presentation	25 Points
Overall	
Total Possible Points	125 Points



7. INFORMATION AND GENERAL CONDITIONS

In addition to the foregoing requirements contained in this RFP, the Consultant shall adhere to the following general conditions, and perform or make provisions for requirements set forth therein.

- a) **Award & Reservations:** The District reserves the right to request an interview with and/or additional information from any firm prior to its selection. However, the District is under no obligation to conduct such interviews prior to making a selection. The District reserves the right to make or not make a selection from this RFP.
- b) **Amendments to RFP:** If it is necessary to make material changes to the RFP, the District will issue addenda to all recipients of record of the original RFP. Any oral communication by the District's Contact Person(s) concerning this RFP is not binding and shall in no way modify the RFP or the obligations of the District or the Consultant.
- c) **Withdrawal:** The Consultant may withdraw a proposal at any time prior to the proposal due date and time by submitting a request in writing.
- A proposal is an irrevocable offer valid at the date scheduled for the proposal opening and for ninety (90) days thereafter. During this period, the service provider is expected to keep available the professional staff proposed for the assignment. The District will make its best effort to complete negotiations within this period. If the District wishes to extend the validity period of the proposals, the service provider who does not agree has the right not to extend the validity of their proposals.
- d) **Consultant's Cost:** The cost of developing a proposal is the Consultant's responsibility and is not chargeable to the District. The District further reserves the right to reject any and all proposals. Consultant acknowledges the District's right to reject any and all proposals.
- e) **Immaterial Defect in Proposal:** The District may waive any immaterial deviation or defect in a proposal. The District's waiver shall in no way modify the RFP documents or excuse the Consultant from full compliance with accepted standards of performance.
- f) **Authorization To Do Business:** Consultant must be authorized to do business in California. If a Consultant is a sole proprietorship or partnership, the Consultant may be required to furnish a copy of a current business license issued in California. If the Consultant is a corporation, it must be approved by the California Secretary of State.
- g) **Agreement:** At the District's discretion, the content of this RFP and the response thereto may be incorporated into any final agreement.
- The Consultant selected for contract award through this RFP shall be required to enter into a written agreement with the District. The Standard Agreement presented herein is the contract proposed for execution. It may be modified to incorporate other pertinent terms and conditioned set forth in this RFP, including those added by addendum, and to reflect the Consultant's offer of the outcome of contract negotiations, if any, conducted with Proposer. Exceptions and requested additions to the terms and conditions of the Standard Agreement, or the Consultant's inability or unwillingness to comply with any of the provisions of the Standard Agreement, must be declared in the proposal and will be considered as part of the proposal evaluation process.
- h) **Invoicing:** Consultant shall submit itemized monthly invoices, which shall include an invoice number, invoice date, purchase order number, and a clear and concise explanation of all services performed, including service dates, in the course of the month, in a format approved and accepted by the District. Invoices shall be submitted no later than the 10th day (or any other mutually agreed upon day) of the ensuing month in which services were performed.
- i) **Oral Communication:** Any oral communications by the Contact or their Consultant concerning this RFP is not binding and shall in no way modify the RFP or the obligations of the District or the Consultant.
- j) **Subcontractors:** If a subcontractor will be used by the Consultant to comply with any portions of this RFP, that fact must be stated in the proposal. The names of the subcontractors and their duties shall be specified in the proposal.
- k) **Disposition of Proposals:** All materials submitted in response to this RFP become the property of the District and will become public records after the award of contract, except for information identified by the Consultant as being proprietary and which is eligible for nondisclosure under the California Public Records Act



EXHIBIT I
SCOPE OF SERVICES

Consultant shall perform a one-time comprehensive classification study of the following three classifications.

- Instructional Aide - Special (approximately 932 incumbents)
- Instructional Aide - Special, Bilingual Spanish (approximately 6 incumbents)
- Instructional Aide - Special, Bilingual Khmer (zero incumbents)

Current job descriptions and salary schedules are available at: http://www.lbschools.net/Departments/Personnel_Commission/

It is expected for the work to begin in October 2017 with a completion date of no later than May 2018 (estimated time schedule).

It is expected that the consultant will:

- Provide the staff required to complete the project in a timely manner. Personnel Commission staff will be available to schedule meetings, coordinate focus groups and site visits, and duplicate and distribute study correspondence.
- Utilize employee focus groups in lieu of traditional questionnaires to obtain pertinent classification information. However, individual requests for desk audits will be honored and those employees will be required to complete a questionnaire for the consultant's use in determining an appropriate classification recommendation. Individual interviews will be held with the consultant for these desk audits.
- Hold focus groups with a minimum of 100 employees district-wide in order to obtain at least a 10-15% sample of employees. Focus groups may include up to 10 employees.
- Conduct site visits including one elementary, one middle, and one high school, and Buffum Total Learning Center (pre-K special education site). Visits will include classrooms providing varying types of services to students.
- Meet to receive input of select special education classroom teachers, professional staff and administrators. Information will be obtained in individual or small group meetings to assist in determining if differences exist among job assignments.
- Identify and develop new classification descriptions as needed during the study and recommend appropriate salary range allocation utilizing external data and internal relationships.
- Periodically meet with Personnel Commission, District and CSEA representatives to inform the stakeholders regarding study progress and results.
- Provide an appeal procedure for employees including consultant review of and response to employee appeals.
- Present final recommendations to the Personnel Commission and respond to employee appeals to the Commission.



REQUEST FOR PROPOSALS 09-1718 Classification and Compensation Study

EXHIBIT I SCOPE OF SERVICES

Submit a preliminary recommendations report and subsequently a final written report for review that includes the following:

- Updated classification specification for Instructional Aide - Special, Bilingual Khmer and Bilingual Spanish
- Identify and develop new classifications as needed during the study and recommend appropriate salary range allocation utilizing external data and internal relationships.
- Allocate each individual employee to the proper classification. The District and Commission wish to adhere to broad-based generic classifications wherever appropriate.
- Salary survey of market data (with Commission review of selected agencies prior to survey) to determine where the Instructional Aide-Special classifications are paid in relation to the median of the market.
- Prepare classification specifications in the LBUSD format (Word document will be provided) based on the type of work and level of duties and responsibilities. The updated class specifications must include all of elements of the classification such as job summary, essential duties, physical demands, working environment and identification of any hazardous conditions.
- Implementation strategies for classification and compensation recommendations