

# City of Forest Park

*Request for Proposals*

*RFP No. 11092023*

*Comprehensive Classification Analysis & Compensation Study*

January 4, 2024

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**Gallagher Benefit Services, Inc.** | [ajg.com](http://ajg.com)



**Gallagher**

Insurance | Risk Management | Consulting

# Table of Contents

1. Letter of Interest .....	1
2. Management Plan .....	2
3. Organizational Structure and Resumes.....	5
4. Quality Control Plan.....	10
5. Experience and Past Performance.....	15
Contractual Considerations .....	16
Required Forms.....	18

# 1. Letter of Interest

January 4, 2024

PERSONAL & CONFIDENTIAL

City of Forest Park  
745 Forest Parkway  
Forest Park, GA 30297

We appreciate the opportunity to present this proposal regarding the services Gallagher's Human Resources & Compensation Consulting practice (Gallagher) can offer the City of Forest Park (the City). Gallagher is highly capable and qualified to work with the City based on our extensive experience with Public Sector organizations throughout the country. We would consider it a privilege to serve the City in this capacity.

It is our understanding that the City is seeking proposals for professional services for a Comprehensive Classification Analysis & Compensation Study. We understand it is the City's strategic objective to attract and retain a highly talented and motivated workforce. Furthermore, we understand that over the years, the City has undergone growth resulting in an increase in recruitment, reorganization of some departments and periodic requests for review of positions. Consequently, a thorough study and analysis of the City's Classification and Compensation levels are warranted.

Gallagher evaluates and considers each Request for Proposal before determining if we have the capacity to conduct the requested services. We can confirm that we not only have the capacity, but the skills and expertise to successfully deliver the requested services to the City. We have completed over 500 classification and compensation studies for municipalities in the last ten (10) years. The experience we have gained in conducting these studies will inform our analyses and recommendations to the City.

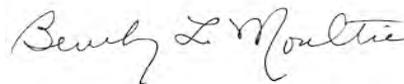
We believe we will provide the City with the most diversely experienced project team of any consulting practice in the country, which enhances the solutions and recommendations we will provide on this engagement. The questions and perspectives provided by our team ensure we anticipate any issues the City may face throughout this project, as well as the ongoing management of the new classification and compensation system.

We appreciate having the opportunity to submit this proposal and look forward to assisting the City in this engagement.

Sincerely,



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Brentwood, TN 37027

## 2. Management Plan

**Key Project Contacts:** Gallagher Benefit Services, Inc. is a wholly owned subsidiary of Arthur J. Gallagher & Company, a publically traded company under the symbol AJG. Gallagher Benefit Services, Inc. was incorporated in 1999 in Delaware. Gallagher Benefit Services, Inc. is headquartered in Rolling Meadows, IL and has offices throughout the United States and abroad. Services will be provided by team members located in our Virginia and Tennessee offices. Other members of Gallagher may be utilized as the project requires. The primary project contacts are as follows:



**Mr. Ronnie Charles**, SPHR, GPHR, IPMA-SCP – *Project Advisor*  
 National Managing Director & Practice Leader  
 651.234.0848  
 Ronnie\_Charles@ajg.com  
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 Principal Consultant  
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 8 Cadillac Drive, Creekside Crossing, Brentwood, TN 37027

**Value Proposition:** The ability to deliver comprehensively structured human capital solutions to clients is Gallagher's signature in the marketplace. At Gallagher, we want to know what makes your organization unique. We listen intently to learn about your culture and priorities and delve deeply into all the details that matter when balancing human capital needs with your bottom line. This single-minded focus on excellence — characterized by innovation and creativity — is the driving force behind every Gallagher engagement.

**Company History:** Arthur J. Gallagher & Co. opened its doors for business in 1927 and is still “growing strong” because of a practiced ability to help clients think ahead. Founded by its namesake who was previously the leading producer for Chicago’s largest insurance brokerage, Gallagher is now one of the world’s largest human capital, insurance brokerage and risk management services firms. We have operations in 33 countries, and extend our client-service capabilities to more than 90 countries through a global network of correspondent brokers and consultants.

Since 1961, we have been helping clients overcome business barriers and create new opportunities to cost-effectively attract, retain and productively engage the best performers in their field. Gallagher started trading on the NYSE under the symbol AJG in 1984.

<p>Founded in <b>1927</b></p>		<p><b>130+</b> Countries Served</p>	<p><b>Global Reach Local Presence</b>                  Shared values                  Passion of excellence                  Promises delivered</p>
<p><b>1,200+</b> Offices Globally</p>	<p><b>\$8.4B</b> Total Adjusted Brokerage &amp; Risk Management Revenues (2022)</p>	<p><b>43,000+</b> Employees Worldwide</p>	 <p><b>2023 WORLD'S MOST ETHICAL COMPANIES™</b>  <b>ETHISPHERE</b>  <b>13-TIME HONOREE</b></p> <p><small>World's Most Ethical Companies™ and "Ethisphere" names and marks are registered trademarks of Ethisphere LLC. Arthur J. Gallagher &amp; Co. has been recognized as one of the World's Most Ethical Companies® in 2010, 2012, 2013, 2014, 2015, 2016, 2017, 2018, 2019, 2020, 2021, 2022 and 2023.</small></p>



**Company Culture & Philosophy:** The ideals, principles and values embodied by the founder whose name still appears on our door are part of our corporate DNA. Gallagher's approach to business, cultivated through three generations of family leadership, has always centered on creating relationship value as true partners to our clients. Gallagher's interactions with you will be straightforward and candid. By earning the trust of our clients, we have sustained a reputation for ethics and a commitment to transparency that continue to contribute to our growth.

In fact, Gallagher was the first insurance broker named to the Ethisphere® Institute's annual list of the World's Most Ethical Companies in 2012 — and has earned this recognition for thirteen years, through 2023. This is a tremendous achievement: in 2018, only 135 companies based in 24 countries and representing 57 industry categories receive this honor. Gallagher is the only insurance broker to have ever been recognized.

The high standards of conduct we have set for our external professional relationships are the same rules we follow internally. The Gallagher Way, a one-page document that outlines our 25 shared values, was written in 1984 but is just as culturally relevant today. It speaks to the value of relationships and several tenets set guidelines for ethical behavior. Gallagher combines innovative solutions, thoughtful advice, and honest business practices to minimize risk and help fuel your success.



**Human Resource and Compensation Consulting Practice:** Gallagher's Human Resources & Compensation Consulting practice empowers clients to **attract talent, manage staff, develop leaders, and reward success**—leveraging the power of Gallagher and the wisdom of experience to produce an engaged and productive workforce. Tapping into expertise that spans the spectrum of human resources at every level, we can assemble flexible compensation and consulting solutions that improve efficiency and build bottom lines. Our practice is a combination of some of the most respected names in human resources and compensation consulting. Bringing together experts from compensation, performance, search, survey, and leadership fields, Gallagher empowers clients with tools for the entire lifecycle of employment management.

With an experienced team of consultants located in offices across the United States and Canada, our services include:

<b>Compensation &amp; Total Rewards</b>	<b>Engagement Solutions</b>	<b>Human Resources Policy &amp; Strategy</b>
<ul style="list-style-type: none"> <li>• Job classification and compensation studies</li> <li>• Pay equity audits</li> <li>• Paid time off policy development and implementation</li> <li>• Employee recognition</li> <li>• Executive compensation</li> <li>• Board of directors compensation</li> </ul>	<ul style="list-style-type: none"> <li>• Workforce engagement surveys</li> <li>• Customer surveys</li> <li>• Post-survey action plan development and execution</li> <li>• Leading-edge capabilities for measuring loyalty and retention drivers</li> </ul>	<ul style="list-style-type: none"> <li>• HR assessment and optimization</li> <li>• Employee policy creation and review</li> <li>• HR compliance support</li> <li>• Diversity, equity and inclusion</li> <li>• Gallagher HRnow Program</li> </ul>
<b>Leadership Development &amp; Organizational Strategy</b>	<b>Executive Search</b>	<b>Data &amp; Research</b>
<ul style="list-style-type: none"> <li>• Data-driven leadership performance and effectiveness assessments</li> <li>• Organizational design</li> <li>• Succession planning</li> <li>• Leadership development through coaching and training programs</li> </ul>	<ul style="list-style-type: none"> <li>• Executive through director-level candidate search</li> <li>• Interim leadership placements</li> <li>• Executive onboarding</li> <li>• Diverse candidate search</li> </ul>	<ul style="list-style-type: none"> <li>• Conducts largest survey of employee benefit programs in the U.S.</li> <li>• Produces 25+ national (U.S.) compensation benchmarking surveys annually</li> </ul>

**Public Sector Consulting Practice:** Gallagher's public sector & higher education consulting practice includes extensive experience in developing and communicating a compensation philosophy, designing, and implementing market-aligned pay structures, and developing job evaluation methods to maintain internal equity. We conduct benchmark analyses, including conducting custom tailored salary surveys (if needed), and recommend appropriate administrative and procedural guidelines to maintain the compensation system. We ensure that our clients are following applicable laws and regulations, such as the Fair Labor Standards Act (FLSA), the Americans with Disabilities Act (ADA), and Equal Employment Opportunity (EEO) standards and have pay systems that are appropriate for their organization and market strategy.



While we have a broad understanding of human resource systems, our practice primarily **specializes in classification and compensation studies.**

We have a strategic alliance with the Public Sector Human Resources Association (PSHRA), the National Public Employers Labor Relations Association (NPELRA), and the Colleges and Universities Professional Association for Human Resources (CUPA - HR) and have conducted a series of training seminars/workshops on compensation, classification, job evaluation, and employee benefits management throughout the nation in conjunction with these organizations. Gallagher Benefit Services also focuses on the higher education market. Our consultants have demonstrated leadership in the compensation field by attaining their Certified Compensation Professional (CCP) certification, and serving as instructors and presenters for WorlDatWork, and the PSHRA.

Our partners have been featured speakers at PSHRA national conference for more than 25 years. **Our managing directors have 30 years of experience assisting organizations in classification and compensation issues.** Our staff members have experience ranging from 2 years to 32 years of similar experience.

In a survey of Gallagher clients served, the independent firm Dun & Bradstreet found that the quality of client services Gallagher delivered exceeded services delivered by 90 other competing firms, including many large national firms. (The factors rated included cost, timeliness, quality, responsiveness to problems, technical support, quantity delivered verses quantity requested, and the attitude of personnel). We have written a bi-monthly compensation answer column called CompDoctor™ for the PSHRA News. Previous articles have included discussions on alternative rewards, such as skill or competency-based pay, best practices in salary administration, and the Sherman Antitrust Act, and many other progressive topics in compensation. We also have published articles in the American City and County, TalentCulture, Public Management, TLNT, Corporate Report Ventures, Corporate Board Member, ERE, Benefits Planner, and others.

#### LEADERSHIP

Strategic alliances with industry associations

Industry leadership in training, research, publications, and presentation

Featured PSHRA speakers for over 25 years

Numerous published articles

## 3. Organizational Structure and Resumes

**Project Organizational Structure:** Your Gallagher consulting team has years of experience consulting to public sector clients. One of the advantages of Gallagher is that we are a small team-based practice in which all members of the project team are intimately familiar with all activities of the project, while having all of the resources of a major national firm. We will work closely with you to ensure a quality product that fits your needs and culture. Even though we may assign certain personnel to specific tasks or responsibilities in the work plan, all personnel can step in and perform the work that needs to be accomplished regardless of the original assignment.

### PROJECT ADVISORS

Review of deliverables prior to submitting to the client.



### PROJECT DIRECTOR & PROJECT LEADERSHIP SUPPORT

Design and deployment of the overall effort, interface with the City, development of the philosophy/strategy, discuss job evaluation methods, and the review and analysis of technical work and cost modeling.

Leads the day-to-day work of the project team related to building the classification structure and the compensation survey to include quality assurance and timeliness of the deliverables.



### PROJECT STAFF SUPPORT

Involvement in all project phases to include researching information, performing quantitative and qualitative analyses, and developing draft deliverables for review by senior staff.

**Key Personnel:** Gallagher fosters a commitment of excellence, professionalism, integrity, collaboration, and urgency to each of our clients. With each unique client, Gallagher combines these principles to deliver client services customized, specifically to meet your needs. Your Gallagher consulting team has years of experience consulting to public sector clients, including public employers, with a significantly diverse employee workforce. Each member of Gallagher's public sector compensation consulting practice has achieved one or more of the following certifications and/or degrees:

- Certified Compensation Professional from WorldatWork
- IPMA-SCP from the Public Sector Human Resources Association
- SPHR from the Human Resources Certification Institute
- SHRM-CP from the Society for Human Resource Management
- Master's degree or above, in Human Resources, Business Administration, and/or Organizational Psychology

### PROJECT ADVISORS

#### **RONNIE CHARLES, SPHR, GPHR, IPMA-SCP - National Managing Director - 30 years' experience**

Ronnie is responsible for leading Gallagher's public sector Human Resources & Compensation Consulting practice. Ronnie has over 30 years of Public Sector HR experience including Chief Human Resources Officer (CHRO) experience most recently in the City of Baltimore with additional professional stints in the District of Columbia, State of Virginia, and City of Suffolk, Virginia. Ronnie has a bachelor's degree in management from Saint Paul's College. Ronnie is a member of several professional organizations, including the International Public Management Association for Human Resources (IPMA-HR) and is a past chair of the International IPMA-HR Professional Development Committee. In addition, Ronnie is a past Chair of the Human Resources Institute (HRCI). He brings vast experience in domestic U.S., and Global HR compensation practices.

#### References:

*Henrico County, Yvette George, Human Resources Director, 804.501.7202, geo029@henrico.us*

*Atlanta Regional Commission, Kameisha L. Johnson, Talent Management Manager, 404.463.3100, kjohnson@atlantaregional.org*



**ERIK SMETANA, MBA, SHRM-SCP, SPHR, Managing Director - 20 years' experience**

Erik's 20-plus year work history has led him to serve in a variety of diverse roles across human resource management, particularly in compensation and benefits, talent management and organizational development, people analytics, and employee relations and policy development. Erik has extensive experience in both private and public sectors, working with an eclectic mix of dynamic organizations including Fortune 500 companies across multiple industries, international not-for-profit organizations, membership associations, media outlets (e.g., NPR and NBC affiliates), institutions of higher education and research, and others. Prior to joining Gallagher, he served as the enterprise-wide Deputy CHRO with the University of Missouri System and for Vanderbilt University as the Executive Director of People & Engagement leading, designing, and implementing compensation and people-focused programs and initiatives.

**PROJECT DIRECTOR**

**BEVERLY MOULTRIE, SPHR, IPMA-SCP - Principal Consultant - 25 years' experience**

Beverly has over 25 years of professional human resources experience in all facets of HR Operations to include Talent Acquisition, Compensation, Benefits, Employee & Labor Relations, Diversity Equity & Inclusion, Talent Development and Safety & Health. Beverly also brings a wide range of expertise working with large, mid-sized and start-up organizations (both public and private) in government, higher education, healthcare, manufacturing, non-profit and service environments. Beverly is particularly adept at managing complex projects and has led the adoption of employee relation strategies and human resource systems where no prior system existed. Her experience also includes a progressive career in HR leadership roles as a Senior HR Leader and as the Corporate Diversity & Inclusion Manager for Fortune 500 companies. Additionally, Beverly has served as the CHRO for the City of Chattanooga where she launched the strategic development of the City's equity & inclusion work with the Government Alliance on Race and Equity. Beverly has a master's degree in business with an emphasis on organization development and is a certified senior human resource professional.

References:

*Henrico County, Yvette George, Human Resources Director, 804.501.7202, geo029@henrico.us*

*Atlanta Regional Commission, Kameisha L. Johnson, Talent Management Manager, 404.463.3100, kjohnson@atlantaregional.org*

**PROJECT LEADERSHIP SUPPORT**

**ALLEN JOHANNING, Senior Consultant - 15 years' experience**

Allen has 15+ years of experience, working in compensation, people analytics, and workforce development and assessment within various healthcare organizations and higher education university systems. Allen began his career focusing on HR Information Systems, Workforce Development, Compensation and Process Improvement in the healthcare industry, working for a large university hospital health system as well as a standalone hospital that was part of one of the state's largest health system. He then transitioned to the University of Missouri System, which is comprised of four Universities and a health system, spread across the state. In his almost 10 years with the University of Missouri System, he held various individual contributor and leadership roles, spending the final 6 years as the Director of Compensation and HR Analytics. Allen received his bachelor's degree in business administration from the University of Missouri-Columbia. He also has previously earned certifications with the Human Resources Certification Institute (Professional in Human Resources) and the Human Capital Institute (Strategic Workforce Planning).

**CATHERINE THORP, BBA in Management, Senior Consultant - 10 years' experience**

Catherine holds a Bachelor of Business Administration degree in Management from the University of Mary Hardin-Baylor. Before joining Gallagher, Catherine worked as a Senior Compensation Manager at Dun & Bradstreet and in roles ranging from analyst to senior manager at McLane Company, Inc. Catherine has applied her compensation knowledge in market analysis, salary structure design, pay equity, career competencies, strategic planning, system integration, and process optimization. Catherine will complete her CCP in 2023.

**DEREK SMITH, PhD, Senior Consultant - 15 years' experience**

Prior to joining Gallagher, Derek served as the National Executive Director of the Higher Education Recruitment Consortium and as a part-time consultant with Sawgrass Consulting, following more than 15+ years in higher education leadership roles at places like UNLV, Kansas State University, the University of Missouri System, and the University of Pittsburgh. Derek has a bachelor's degree in history, a Master of Science, a Master of Business Administration and a PhD in Public Policy and Leadership. He has earned professional certifications with the Human Resources Certification Institute (PHR), Society for Human Resource Management (SHRM-CP) and the Korn Ferry Leadership Architect.



**LARRY ROBERTSON, Senior Consultant - 26 years' experience**

Larry's 27 plus year work history includes a variety of roles that included compensation, human resources information systems, recruiting as well as serving in a primary leadership role as acting vice president for human resources for several months. Larry has experience in private and public sectors, working in a manufacturing environment before moving to higher education for the 21 years before coming to Gallagher. He has previously earned professional certifications with the Human Resources Certification Institute (PHR and SPHR). He has been actively involved in CUPA-HR on chapter, regional and national boards. He is a 2022 CUPA-HR Distinguished Service Award Recipient.

**SHARI FALLON, PHR, SHRM-CP - Senior Consultant - 24 years' experience**

Prior to joining Gallagher, Shari worked for Cornell University as a Senior Compensation & Workforce Analytics Consultant for 24 years. In her role at Cornell University Shari was responsible for providing expertise and consultation to campus constituents and resolving conflicts among functional areas to support best practice standards. She developed and designed the institutional foundation for assessing, delivering, and applying workforce planning analytics, advancing HR interests and shared responsibility in the consistency of practice across recruiting, compensation, staffing patterns, performance management, training, and transaction processing. Prior to Cornell she worked in Human Resources for Retail and Health organizations. Shari has a bachelor's degree in political science/history from the College of St. Rose in Albany, NY and is certified as a Professional in Human Resource from the Society of Human Resource Management.

**TED JAEGER, Senior Consultant - 25 years' experience**

Ted has more than 25 years of leadership, consulting and HR Outsourcing experience in compensation program management at large, publicly traded corporations (Coca-Cola, Accenture, E\*TRADE Financial, ADP) and in higher education (Clemson & Emory Universities). Areas of specialty include job architecture/design, job evaluation, market pricing, internal/external equity reviews, project management, stock plan/executive compensation, and compensation systems implementations. He holds an MBA from Georgia State University, a BBA from The University of Georgia.

**PROJECT STAFF SUPPORT****AMBER SHANG, MA in I/O Psychology – Associate Consultant - 2 years' experience**

Amber holds a BS with honors in Psychology from the University of Washington and an MA in Industrial & Organizational Psychology from New York University. Before joining Gallagher, Amber has applied her knowledge of people analytics in roles ranging from Talent Acquisition at VNS Health to Compensation Analysis at Willis Towers Watson, and Selection & Assessment at DCI Consulting Group. At WTW and DCI, she helped clients from various sectors to tackle challenges and identify strategic solutions.

**CHARMAIN KOHLER – Consultant - 10 years' experience**

Charmain has over 25 years of human resources experience in a variety of roles and industries. She has a Bachelor's degree in Business Administration with a concentration in Management from Saginaw Valley State University. Prior to joining Gallagher, she was the Senior Compensation Analyst at Numotion and at Saginaw Chippewa Indian Tribe of Michigan. Her professional experience also includes 10 years as a Human Resources Consultant in higher education.

**CHAU TRAN – Consultant - 9 years' experience**

Chau holds a Bachelor of Arts degree from the University of Utah and brings 9.5 years of experience working in public sector human resources compensation consulting. Chau served as a senior data analyst in compensation consulting at the Texas Association of School Boards where she served community colleges, public schools, charter schools, and educational service centers across the state of Texas.

**DEE SMITH, Consultant - 18 years' experience**

Dee is an established Human Resources professional that brings 18 years of comprehensive HR experience in several vertical industries in both the private and public sectors. Dee earned a Bachelor of Science degree in Human Resources Management and General Management from the University of Tennessee at Chattanooga and also holds an MBA. Dee is experienced in the areas of operations, recruitment, employee relations and benefits administration.

**JAIME PARKER, Consultant - 15 years' experience**

Jaime has 15 years of experience in Higher Education with 7.5 of those years in compensation and organizational effectiveness. Prior to joining Gallagher, she worked at Kansas State University in Human Capital Services, and also in the Office of Institutional Effectiveness. Before her career in Higher Education, Jaime worked in the Banking Industry as a Banking Center Manager and Customer Service Manager. Jaime is a graduate of Kansas State University with a bachelor's degree in Accounting.

**LUCILLE ZHANG, Consultant - 2 years' experience**

Lucille has experience in the areas of compensation, talent management, training, and people analytics. Prior to joining Gallagher, Lucille served as a Compensation Analyst at Novelis, where she provided expertise in the administration and implementation of compensation programs. She also has worked at Willis Towers Watson to support clients across industries on executive compensation. Lucille earned a Bachelor's Degree in Psychology from Lafayette College and a Master's Degree in Industrial and Organizational Psychology from New York University.

**TRACY MORRIS – Consultant - 7 years' experience**

Tracy has 7 years' experience working in public sector HR and compensation consulting. Tracy holds a bachelor's degree in applied economics and a Master of Business Administration, both from Texas Tech University, and she is a SHRM Certified Professional (SHRM-CP).

**MARY GAUTHE, SHRM-CP, Associate Consultant - 5 years' experience**

Mary has 5 years of experience from Louisiana State University, where she's worked within the University's Central HR unit as a Compensation Consultant. Mary has a Bachelor's degree in Management with a concentration in Human Resources from Nicholls State University and is currently set to graduate from Louisiana State University in August with her Master's in Leadership and Human Resource Development.

**PRISCILA CANDAL, MA – Associate Consultant - 8 years' experience**

Priscila has experience in employee relations, compensation and classification and talent acquisition. She worked at the City of Gainesville as a Talent Acquisition Representative and at Iowa State University as a Human Resources Generalist, giving her first-hand experience in the public sector and higher education. She also worked for a global agricultural and forestry machinery manufacturer in Germany. Priscila has a Bachelor of Arts in Psychology and a Master of Business Administration in Human Resources. She is located in Gainesville, Florida.

**KEVIN GRANGER, Senior Analyst - 12 years' experience**

Kevin received his Bachelor's Degree in Mathematics from Texas Southern University in 2020. Prior to joining this team, Kevin worked at Gallagher as an Associate Account Manager for 2 years. Kevin is a Houston native and loves his city.

**TERESA NGUYEN, MS, Senior Analyst - 2 years' experience**

Teresa has a Bachelor's degree in Organizational Psychology from Spalding University and a Master's degree in Industrial Organizational Psychology from Western Kentucky University. Her most recent role was with Louisville Metro Government, as a Compensation & Classification Analyst. Her role focused on job descriptions, job evaluations, reclassifications, market analysis, and compensation projects focused on internal equity.

**XIAOWEN YANG, BS IN MATHEMATICS, Senior Analyst - 5 years of experience**

Xiaowen comes to Gallagher with five years of analytical experience in learning & development, product management, sales operations, and employee & physician engagement. Xiaowen most recently managed the full-cycle employee engagement survey program – encompassing design, development, analysis, reporting, and action planning - at West Monroe.

**YUMI ZHU, MA, Senior Analyst - 2 years' experience**

Prior to joining Gallagher, Yumi worked at WTW as a compensation analyst and interned at PwC and KPMG China where she gained experience working in consulting. Yumi recently graduated from University of Pennsylvania with a master's degree in Organizational Dynamics and held a bachelor's degree in Finance from DePaul University.



**CARISSA MARTO, MA in I/O Psychology, Analyst - 2 years' experience**

Carissa has a Bachelor's Degree in Psychology from Anderson University (SC) and a Master's Degree in Industrial & Organizational Psychology from Middle Tennessee State University. Prior to joining Gallagher, she held project based roles working in performance and promotional assessments related to test design.

**JOY PHILLIPS, MA, Analyst - 2 years' experience**

Joy has 2 years of experience from Louisiana State University, where she's worked within the University's Central HR unit as an HRIS data analyst. Joy has a Master's degree in Human Resources & Leadership Development from Louisiana State University.

*Gallagher does not, and will not, use any subcontractors to deliver services to the City. All the consulting analyses and assistance we provide are furnished by staff employed by Gallagher.*

## 4. Quality Control Plan

Our practice takes a thoughtful and collaborative approach to all of our client engagements, where we work to ensure our efforts are ones which demonstrate how the Public Sector & Higher Education practice **C.A.R.E.S.** - collaborate/consult, advise/assess, recommend/resource, engage/endorse, and strategize/serve - about our clients and their needs. To that end, our project approach starts with our process and client communications.



Our extensive experience has resulted in a comprehensive understanding of the scope of work described by the City. Additionally, we understand the importance of this study as one of many strategies to address current human resources issues and appreciate the delicate nature of public sector spending. Below are some key considerations we have in this type of project, our methodology, our detailed work plan, and estimated project timeline.

### Key Considerations

- **Employee Involvement.** The study should be introduced to employees so they know what will happen and can ask questions, and then we suggest summarizing the study findings at the end of the project in an open session so they can see the results. Updates throughout the process will go a long way toward acceptance of the results. We believe that if employees know how and why they are compensated the way they are, they will accept the results better than if the system was created without their involvement.
- **Leadership Sponsorship.** Change is complicated! Updating classification and compensation systems requires strong and visible support of an organization's management and governance.
- **Internal Equity.** While market parity is important, most employees want to make sure that they are paid fairly in relation to other employees. We have extensive experience with designing pay systems that consider internal equity and mitigate compression.
- **Project Timing.** Doing it right produces a better study outcome than trying to meet unrealistic deadlines.
- **Data/Exceptions.** Rely on data but make decisions based on humans. It has been our philosophy that the results and recommendations should be based on verifiable, auditable, and valid data. Once the basic structure is in place, adjustments may be needed for special conditions or other factors. However, the classification and compensation systems should be based on verifiable facts and solid professional standards.
- **Communication.** These systems need to be understood. They need to be simple, straightforward, and transparent.
- **Pay Compression.** Give adequate attention to implementation costs when employees are placed in pay ranges and there is potential for creating or increasing pay compression

### Methodology

**Classification and Job Evaluation:** The City would like a review and an analysis of the duties and responsibilities of its jobs included in the study to ensure the jobs are correctly classified and to establish internal equity among jobs.

Gallagher can also develop new or update classification specifications/job descriptions as a result of this classification process.

Recommendations for allocation of employees to the updated classifications will be made. The City will review all recommendations and classification specifications within this process and provide consolidated and timely feedback to Gallagher. One set of revisions for the job descriptions and classification recommendations is provided for in this process.

Gallagher will discuss job evaluation with the City and will explore optional methods for the development of internal equity for the City. Gallagher will apply the selected system to all resulting jobs and update the internal equity ratings as appropriate. The City will have the opportunity to provide consolidated feedback to the job evaluation results with the results finalized by Gallagher. Detailed and tailored training will be provided to the administrative staff that will be responsible for overseeing the system.

The results from the formal job evaluation process will be coordinated with the results of the compensation survey to create a pay structure.

**Compensation Survey and Pay Structure Development:** Following industry standards and best practices, a customized survey process will be undertaken to collect market pay comparison information related to all City classifications. Gallagher and the City will work together to develop the listing of comparable organizations and the list of benchmark jobs to be surveyed. Private sector information, if desired by the City, can be collected using valid and credible published survey sources and the data integrated with the customized survey data to arrive at the market information.

We follow professionally accepted compensation principles and practices as outlined by *WorldatWork*, SHRM, and the Department of Labor. Some of these guidelines are listed below. We have also authored many articles on various aspects of conducting salary surveys; please refer to our website [www.ajg.com/compensation](http://www.ajg.com/compensation) for these specific articles.

We utilize the following guidelines for benchmark selection:

- Representation of all job families and levels throughout the organization
- Highly populated jobs
- Jobs found in most organizations
- Jobs with recruitment or retention problems

We will review job descriptions and other job documentation to ensure we understand the duties and responsibilities, level in which the job is functioning and the reporting relationships so that participating organizations can match their classifications to the benchmark jobs. We will draw on our 30 years of salary and benefits survey experience to determine if a comparable job can be found in the labor market. We will ask the City to clarify any questionable jobs and/or answer any questions we may have about a particular job.

We follow guidelines for job matching (match only those jobs that match at least 80% of the duties, responsibilities and functions as outlined in the benchmark job summary). While some firms may claim to use a higher percentage, we believe anything over 80% may exclude data that are good, valid matches. We do not ask participants to rate the quality of the match, as this introduces additional subjectivity to the process that cannot be controlled.

We follow professionally accepted guidelines for defining labor markets and selecting organizations to survey. We factor in that different jobs will have different recruiting markets, by:

- Type of organization (e.g., Public vs. Private Sector)
- Size of organization
- Geographic location
- Services provided

It is important to define an organization's labor market prior to the survey rather than after the data have been collected so that it does not appear that the labor market data are being manipulated to support a certain conclusion. This could cause significant issues from an employee perception standpoint as well as potentially violate Federal Trade Commission and the U.S. Department of Labor's Sherman Antitrust Act guidelines in regard to the analysis of salary data.

Any published sources utilized must meet the following criteria:

- Be conducted by a reputable salary survey firm
- Survey data is not self-reported
- Survey is conducted on a continual basis instead of a one-time event
- Survey reports its data sources, the effective date of the data, and was tested to ensure accurate matches and data

We will develop a data collection form that poses questions in a fashion that is easy for participants to answer, as well as being easy to quantify and analyze.

We follow-up with participants to ensure data quality and validity of matches and data being reported. If there are any questions, we ask questions and we seek job descriptions, organizational charts, and other information.

We perform several reviews of the data as well as statistical tests to identify any extreme data and to ensure the validity of the data.

We utilize trend factors for aging data so that all data is consistent to a current point in time. The trend factors are derived from either the U.S. Department of Labor data or *WorldatWork* Surveys.

We apply geographic differentials as appropriate and necessary to ensure that the data are reflective of the City's labor market and economic conditions. We use third party resources (ERI) to identify the appropriate geographic differences.

We calculate various statistics for summarizing the data (means, medians, highs, lows, percentiles). We follow the Federal Trade Commission and the U.S. Department of Labor guidelines that 5 matches should exist per job in order to draw reliable conclusions. Therefore, we do not calculate statistics (means, medians, etc.) on jobs with fewer than 5 job matches.

The City would like the development of salary structure options so that compensation is equitable and competitive. In order to develop a reliable salary structure, we integrate market data and custom survey results with the internal equity ratings from job evaluations if applicable, so that the structure is internally equitable and externally competitive. In this step, we assign all jobs to the right pay grade and all employees to the right place in the range based on agreed upon criteria. During this phase, we also discuss how pay progression is integrated in a sustainable system that grows with the City and allows for employee development and contribution to goal achievement. We will also review the resulting structure for pay compression and pay equity issues. Up to three implementation scenarios will be provided to the City.

Gallagher will review and update the City's current policies and procedures related to classification and compensation.

**Final Report:** As mentioned above, our final report will be prepared which outlines the process, methods, techniques and findings and recommendations of the study. It will include a financial impact analysis and recommended ways to implement and maintain the system in the future. We will provide the data in a format that can be used to update your HRIS system based on your implementation approach. Finally, we will train the HR staff in the proper procedure and methods to manage and maintain the system. Additionally, we will provide the necessary documentation and other materials so the City will be able to maintain the system independent of the consultant following implementation.

## Work Plan

The work plan proposed is designed to provide the flexibility necessary to attract, retain, and motivate employees to provide quality services and ensure the system is not an administrative and/or costly burden to the City now or in the future. Gallagher has integrated the Scope of Services into our phased approach and deliverables to address the City's requests.

The phased work plan is as follows:

**PHASE 1: STUDY ADMINISTRATION**

Meeting via telephone/online platform to initiate project and discuss timelines and key deliverables.

Organization & salary material collected.

Discussion/review of the strengths and weaknesses of the City’s current classification system. Discussion of the City’s current philosophy and supporting strategies.

Project timetable confirmed.

Employee orientation sessions conducted.

*Virtual Meetings are included. On-site visits are available at an additional charge to the City.*

**PHASE 2: CLASSIFICATION & COMPENSATION STUDY**

*Conduct of meetings with HR/leadership/project team at critical intervals to discuss deliverables.*

**CLASSIFICATION STUDY**

Review of and analysis of job descriptions/documentation for all employees covered by the study.

Conduct interviews with managers/supervisors (and with individual employees, as necessary) to verify/clarify job information.

Analysis of existing classifications and recommendations on any changes to current classification plan.

Review exempt and non-exempt classifications to ensure proper Fair Labor Standards Act (FLSA) status.

Recommendation of standard classification and titling conventions.

If applicable, allocate employees to an appropriate job class in the new classification structure.

Conduct a complete diagnostic review of current the City’s practices to identify areas of concern.

Development of new or updated job descriptions.

**COMPENSATION STUDY**

*CUSTOM SURVEY*

Labor market confirmed and survey participants identified to gather data from local, state and regional sources.

Benchmark jobs identified and summarized.

Benefit and pay practice questions determined for inclusion in the custom survey. Custom survey developed and conducted.

*INTEGRATE PUBLISHED SURVEY SOURCES*

Identify appropriate published survey sources.

Collect market data from published survey sources using data cuts from public, private, local, state and regional sources.

*The following activities will be performed on all data:*

Comprehensive internal salary relationship analysis of data to ensure the structure is internally equitable and externally competitive.

Competitive analysis of market data (salary, benefits, and contracts) performed.

Diagnostic review of current salary structures conducted to identify opportunities for simplification, reduction in pay compression.

Recommended pay structure developed or existing structures updated (includes 1 revision requested).

Internal review conducted and consolidated feedback provided by the City. The City approves the updates to the pay plan(s) and other recommendations and implementation options.

Provide the City with up to three (3) transition options, recommendations and next steps/ongoing maintenance.

**PHASE 3: PROJECT FINALIZATION, DRAFT & FINAL REPORTS**

Consultant shall make presentations to the HR/leadership prior to completion and at the time of completion, at times and in a manner agreed upon with the City.

Conduct of meetings with HR/leadership/project team at critical intervals to discuss deliverables.

Draft and final report and presentations developed and quality assurance reviews conducted.

Training provided for staff including necessary tools to maintain the system.



**Project Timeline:** We understand that the City anticipates the work will be completed in 120 days (4 months). However, based on our professional experience, projects of this scope typically take approximately 6 months to complete. The following is an estimate to complete each phase by month. We will discuss the details of each phase during Phase 1 and identify specific project deadlines. We will conduct frequent conference calls with the City to ensure the schedule is monitored throughout the project.

In today’s world, speed is important. However, given the significance of this project, it is just as important for City officials, department heads, and employees to have sufficient time to review and approve the recommendations of Gallagher and to ensure proper communications occur. We have prepared a timeline using our experience to ensure the City receives quality work products in an expeditious manner. Our phases run concurrently; in that we do not wait until the full completion of a phase to begin another phase. We are prepared to commence the work within two weeks of receiving your authorization to proceed.

Month	PHASE 1	PHASE 2	PHASE 3
	Study Administration	Classification & Compensation Study	Project Finalization, Draft & Final Reports
1			
2			
3			
4			
5			
6			

**Responsibilities of the City:** Gallagher will work with the City on every step of our proposed project plan. We will listen attentively in order to understand the current state and the desired future state of the classification and compensation system. While the City has provided detailed information on the current status, our goal is to discuss these practices and processes in order to fully comprehend how the policies impact the day-to-day operations and long-term effects. We want to make sure that our design approach is appropriate to your needs and fits with the culture and structure of the City, as well as supports the City’s mission and strategic objectives.

In preparation for project initiation, we will need the City’s Project Team to support our compensation plan, which involves the following:

- Collection of organization & salary information
- Discussion of possible barriers to implementing and maintaining change
- Review and discussion of the strengths and weaknesses of the City’s current compensation systems, to include review of the current grade methodology


This will enable our team to work with the City on the development of the working compensation philosophy and strategies that will guide the project through the rest of the phases. It is the role of our team to develop the project timetable and tracking documents to manage the project. However, we will partner with the City to ensure this is appropriate and determine when the timeline may need to be adjusted in order to ensure an accepted solution. While the timelines of projects are important, we believe the development of the right system takes priority. If this requires more communication or analysis at various phases, we will determine such in collaboration with the City.

We propose to meet with the City’s Project Team at intervals as necessary determined by the consultant and/or the City. These off-cycle meetings can be held via web conferences to enable the sharing of information. Additionally, we conduct weekly or bi-weekly calls which are helpful to touch-base and keep the project on track. These calls may not need the full project team each time, but as necessary for various phases of the project.




## 5. Experience and Past Performance

We have included a sampling of references that demonstrates our experience in conducting engagements for public sector clients. Contact names and phone numbers are listed for each project. These projects are relevant to demonstrating our ability to meet the needs of the City and show considerable experience in developing compensation systems for a variety of public sector organizations. Our references can attest to the timeliness, quality, and responsiveness of the services we provide, our understanding of job classification and pay equity, and our knowledge of legal issues, such as the ADA and FLSA, and our expertise in working with public organizations and sensitive personnel issues. The projects listed below were completed by members of your project team and within similar timeframes to what the City is requesting. Many of the clients listed below have recommended our services to other organizations that we are working with currently.

 **PRINCE WILLIAM COUNTY, VA** | 1 County Complex Court, Suite 155, Woodbridge, VA 22192  
**Angela Poetzman**, Project Manager, 703.792.6102, Angela.Poetzman@pwcgov.org


Beginning in 2018, we were engaged to conduct a classification and compensation study addressing approximately 4,800 employees in 600 job classes, which included the development of a compensation strategy; job evaluation; analysis of the class system including employee questionnaires, employee interviews and panels; development of a simplified and flexible class structure and employee allocations; the conduct of a compensation study and development of updated pay structures; implementation costing; and best practices guidance. Additionally, we completed a compensation study for the County in 2022.

 **CITY OF AUSTIN, TX** | 301 West Second Street, Austin, TX 78701  
**Bryan Dore**, Compensation Manager, 512.974.3216, bryan.dore@austintexas.gov


We have been retained to do numerous projects with the City since 2017. In 2017, we were hired to assist the City with a review and assessment of the compensation strategy and to conduct a compensation study for the Human Resources and Legal departments. In 2019, Gallagher conducted another custom salary survey for the City and a comprehensive evaluation of pay equity in comparison to its prior studies to identify if there are any pay equity issues in the organization. Since 2021, we have been engaged in several more compensation projects.

 **HENRICO COUNTY, VA** | 4301 East Parham Road, Henrico, Virginia 23228  
**Yvette George**, Human Resources Director, 804.501.7202, geo029@henrico.us

We recently completed a compensation project encompassing 11,250 general government, public safety, and public school employees in 779 job classifications

 **CITY OF SACRAMENTO, CA** | 915 I Street Sacramento, CA 95814  
**Shelley Banks-Robinson**, Director of Human Resources, 916.808.554, SMBanks-Robinson@cityofsacramento.org

We worked with the City on a classification and compensation study that resulted in updating all the classification specifications, collecting market data on over 200 benchmark jobs, and salary structure recommendations.

 **RAMSEY COUNTY, MN** | 4000 Metro Square, St. Paul, MN 55101  
**Johanna M. Berg**, Deputy County Manager, 651.266.2762, johanna.berg@co.ramsey.mn.us

We are finalizing work with the County on a comprehensive classification and compensation project encompassing all County operations of approximately 4,000 employees in 600 classifications.

*Additional references and/or case studies are available upon request to support client decision-making.*

# Contractual Considerations

Gallagher is pleased to submit this proposal to the City. While this proposal is not meant to constitute a formal offer, acceptance, or contract, notwithstanding anything to the contrary contained in the proposal, Gallagher is submitting this proposal with the understanding the parties would negotiate and sign a contract containing terms and conditions that are mutually acceptable to both parties.

Our legal team has provided the following exceptions to the terms and conditions outlined in this proposal. **We are open to discussion on these.**

Gallagher is not a federal contractor or subcontractor. Therefore, Gallagher cannot agree to federal contracting provisions contained within the RFP.

Part III BONDING AND INSURANCE REQUIREMENTS (PDF Page 17), EXHIBIT D (PDF Page 65 - 67) - Below are Gallagher's insurance representations based on AJG Risk Management policies. These are not changed on a client by client basis:

Gallagher shall at all times during the term of this Agreement and for a period of two (2) years thereafter, obtain and maintain in force the following minimum insurance coverages and limits at its own expense:

- Commercial General Liability (CGL) insurance on an ISO form number CG 00 01 (or equivalent) covering claims for bodily injury, death, personal injury, or property damage occurring or arising out of the performance of this Agreement, including coverage for premises, products, and completed operations, on an occurrence basis, with limits no less than \$2,000,000 per occurrence and \$4,000,000 in the aggregate;
- Workers Compensation insurance with statutory limits, as required by the state in which the work takes place, and Employer's Liability insurance with limits no less than \$1,000,000 per accident for bodily injury or disease. Insurer will be licensed to do business in the state in which the work takes place;
- Automobile Liability insurance on an ISO form number CA 00 01 covering all hired and non-owned automobiles with limit of \$1,000,000 per accident for bodily injury and property damage;
- Umbrella Liability insurance providing excess coverage over all limits and coverages with a limits no less than \$10,000,000 per occurrence or in the aggregate;
- Errors & Omissions Liability insurance, including extended reporting conditions of two (2) years with limits of no less than \$5,000,000 per claim, or \$10,000,000 in the aggregate;
- Cyber Liability, Technology Errors & Omissions, and Network Security & Privacy Liability insurance, including extended reporting conditions of two (2) years with limits no less than \$2,000,000 per claim and in the aggregate, inclusive of defense cost; and
- Crime insurance covering third-party crime and employee dishonesty with limits of no less than \$1,000,000 per claim and in the aggregate.

All commercial insurance policies shall be written with insurers that have a minimum AM Best rating of no less than A-VI, and licensed to do business in the state of operation. Any cancelled or non-renewed policy will be replaced with no coverage gap, and a Certificate of Insurance evidencing the coverages set forth in this section shall be provided to Client upon request.

\* \* \* \* \*

Thank you for this opportunity to offer our services. Please feel free to contact us at any time if you have any questions or require additional information. We look forward to hearing from you soon.

Sincerely,

A handwritten signature in black ink that reads 'Ronnie Charles'.

Ronnie Charles, SPHR, GPHR, IPMA-SCP  
National Managing Director & Practice Leader  
651.234.0848  
Ronnie\_Charles@ajg.com  
5516 Falmouth Street  
Richmond, VA 23230

A handwritten signature in black ink that reads 'Beverly L. Moultrie'.

Beverly Moultrie, SPHR, IPMA-SCP  
Principal Consultant  
651.234.0855  
Beverly\_Moultrie@ajg.com  
8 Cadillac Drive, Creekside Crossing  
Brentwood, TN 37027

# Required Forms

## **FORM 1** **BID SUBMITTAL LETTER**

This Form Must Be Signed and Return with Bid or Bid will be Deemed Non-responsive.

RFP # 11092023

The undersigned, Ronnie Charles, hereby submits its qualification based bid to furnish all services, labor, materials, or equipment, delivered by the undersigned for the above referenced RFP to the City of Forest Park, Georgia.

The undersigned acknowledges and agrees that the bid submitted by the undersigned shall be binding upon the undersigned and that if City of Forest Park, Georgia, awards a contract to the undersigned, the bid made by the undersigned and delivered to City of Forest Park, Georgia herewith, together with such award, will constitute a legal, valid and binding contract between the undersigned and City of Forest Park, Georgia. The Contract created pursuant to the previous sentence shall incorporated the terms and conditions of the bid including, but not limited to, the bid Scope of Work, solicitation instructions and conditions, the contract provisions and the contractor's proposal, all as described in the bid.

IN WITNESS WHEREOF, the undersigned has duly executed and delivered this RFP Submittal Letter this 2 day of January, 2024.

By: 

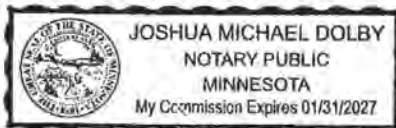
Title: Managing Director & Practice Leader

Sworn to and subscribed before me the 2 day of January, 2024.

Notary Public: 

My Commission Expires: 1/31/2027

[SEAL]



**Required Submittal (FORM 2)**  
**Illegal Immigration Reform and Enforcement Act Forms (Page 1 of 3)**

**INSTRUCTIONS TO OFFERORS:**

All Offerors **must** comply with the Illegal Immigration Reform and Enforcement Act, O.C.G.A. §13-10-90, et seq. (IIREA). IIREA was formerly known as the Georgia Security and Immigration Compliance Act or GSICA. Offerors must familiarize themselves with IIREA and are solely responsible for ensuring compliance. Offerors must not rely on these instructions for that purpose. The instructions are offered only as a convenience to assist Offerors in complying with the requirements of the City's procurement process and the terms of this solicitation document.

1. The attached Contractor Affidavit (Form 1) must be filled out COMPLETELY and submitted with the proposal/bid.
2. The Contractor Affidavit must contain an active Federal Work Authorization User ID Number, also known as an E-Verify Company ID Number or E-Verify Number, and Date of Authorization (mm/dd/yyyy). **Please Note: The E-Verify Company ID Number is not a Tax ID Number, Social Security Number or formal contract number.**
3. If the Offeror is a Joint Venture and the Joint Venture has an EIN, **one** Contractor Affidavit must be completed by the Joint Venture and it must include the E-Verify Company ID Number issued to the Joint Venture. Each business participating in the Joint Venture does **not** need to submit a separate Contractor Affidavit.
4. If the Offeror is a Joint Venture and the Joint Venture does not have an EIN, each business participating in the Joint Venture **must** complete and submit its own Contractor Affidavit. The Contractor Affidavit must include the participating business's E-Verify Company ID Number.
5. All Contractor Affidavits must be executed by an authorized representative of the entity named in the Affidavit.
6. **All Contractor Affidavits must be sworn, signed and dated in the physical presence of a notary public. The signature dates for both the authorized representative and notary public must be the same.**
7. \*Subcontractor and sub-subcontractor affidavits are not required at the time of proposal/bid submission but will be required at contract execution phase or in accordance with the timelines set forth in IIREA.
8. Offeror's failure to comply with the above instructions may result in the Offeror being deemed non-responsive.

**Required Submittal (FORM 2)**

**Contractor Affidavit under O.C.G.A. § 13-10-91(b)(I)**

The undersigned contractor ("Contractor") executes this Affidavit to comply with O.C.G.A § 13-10-91 related to any contract to which Contractor is a party that is subject to O.C.G.A. § 13-10-91 and hereby verifies its compliance with O.C.G.A. § 13-10-91, attesting as follows: (a) the Contractor has registered with, is authorized to use and uses the federal work authorization program commonly known as E-Verify, or any subsequent replacement program; (b) the Contractor will continue to use the federal work authorization program throughout the contract period, including any renewal or extension thereof; (c) the Contractor will notify the public employer in the event the Contractor ceases to utilize the federal work authorization program during the contract period, including renewals or extensions thereof; (d) the Contractor understands that ceasing to utilize the federal work authorization program constitutes a material breach of Contract; (e) the Contractor will contract for the performance of services in satisfaction of such contract only with subcontractors who present an affidavit to the Contractor with the information required by O.C.G.A. § 13-10-91(a), (b), and (c); (f) the Contractor acknowledges and agrees that this Affidavit shall be incorporated into any contract(s) subject to the provisions of O.C.G.A. § 13-10- 91 for the project listed below to which Contractor is a party after the date hereof without further action or consent by Contractor; and (g) Contractor acknowledges its responsibility to submit copies of any affidavits, drivers' licenses, and identification cards required pursuant to O.C.G.A. § 13-10-91 to the public employer within five business days of receipt.

522200060 01/08/2008  
Federal Work Authorization User Identification Number Date of Authorization (mm/dd/yyyy)

Gallagher Benefit Services, Inc. RFP No. 11092023  
Name of Contractor (Legal Name of Offeror) Name of Project/Solicitation Number

\_\_\_\_\_  
Name of Public Employer

**I hereby declare under penalty of perjury that the foregoing is true and correct.**

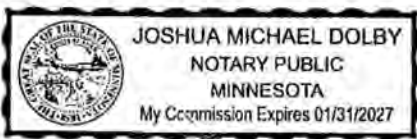
Executed on January 2, 2023 in Minneapolis (City), MN (State).

Signature of Authorized Officer or Agent

Ronnie Charles, National Managing Director & Practice Leader  
Printed Name and Title of Authorized Officer or Agent

SUBSCRIBED AND SWORN BEFORE ME  
ON THIS THE 2 DAY OF January, 2024.

NOTARY PUBLIC



My Commission Expires: 1/31/2027

**\*The signature dates for both the authorized representative and notary public must be the same.**

**N/A**

**Required Submittal (FORM 2b)**  
**Subcontractor Affidavit under O.C.G.A. § 13-10-91(b)(3)**

By executing this affidavit, the undersigned subcontractor verifies its compliance with O.C.G.A. § 13-10-91, stating affirmatively that the individual, firm, or corporation which is engaged in the physical performance of services under a contract with (name of contractor) on behalf of (name of public employer) has registered with, is authorized to use and uses the federal work authorization program commonly known as E-Verify, or any subsequent replacement program, in accordance with the applicable provisions and deadlines established in O.C.G.A. § 13-10-91. Furthermore, the undersigned subcontractor will continue to use the federal work authorization program throughout the contract period and the undersigned subcontractor will contract for the physical performance of services in satisfaction of such contract only with sub-subcontractors who present an affidavit to the subcontractor with the information required by O.C.G.A. § 13-10-91(b). Additionally, the undersigned subcontractor will forward notice of the receipt of an affidavit from a sub-subcontractor to the contractor within five (5) business days of receipt. If the undersigned subcontractor receives notice that a sub-subcontractor has received an affidavit from any other contracted sub-subcontractor, the undersigned subcontractor must forward, within five business days of receipt, a copy of the notice to the contractor. Subcontractor hereby attests that its federal work authorization user identification number and date of authorization are as follows:

\_\_\_\_\_ Federal Work Authorization User Identification Number      \_\_\_\_\_ Date of Authorization (*mm/dd/yyyy*)

\_\_\_\_\_ Name of Subcontractor (*Legal Name*)

\_\_\_\_\_ Name of Project/Solicitation Number

\_\_\_\_\_ Name of Public Employer

**I hereby declare under penalty of perjury that the foregoing is true and correct.**

Executed on \_\_\_\_\_, \_\_, 20\_\_ in \_\_\_\_\_ (City), \_\_\_\_\_ (State).

\_\_\_\_\_ Signature of Authorized Officer or Agent

\_\_\_\_\_ Printed Name and Title of Authorized Officer or Agent

SUBSCRIBED AND SWORN BEFORE ME  
ON THIS THE \_\_\_\_\_ DAY OF \_\_\_\_\_, 20\_\_.

\_\_\_\_\_ NOTARY PUBLIC

My Commission Expires: \_\_\_\_\_

***\*The signature dates for both the authorized representative and notary public must be the same.***



**Required Submittal (FORM 3)**

**Contractor's Statement of Legal Status and Financial Capability**

*For official and confidential use by the City of Forest Park, Georgia*

**Purpose/Instructions:** The following information will be used by the City of Forest Park, Georgia in determining whether or not the identified Contractor has, in the opinion of the City of Forest Park, Georgia, the financial capability to successfully fulfill its obligations to the City.

If space on this form is inadequate for any requested information, please furnish on attached pages with a reference to the appropriate question number on this form.

**A. Submission Information:**

1. This Statement is being submitted as required by a FOREST PARK Solicitation:

FOREST PARK Solicitation #: 11092023  
Project Name: Comprehensive Classification Analysis & Compensation Study

2. This information is current as of (date): January 2, 2024

**B. Contractor Information**

- 1. Official Company/Entity Name: Gallagher Benefit Services, Inc.  
(hereinafter "Contractor")
- 2. Mailing Address: 5516 Falmouth Street City/State/Zip: Richmond, VA 23230
- 3. If at this address less than 1 year, prior address: \_\_\_\_\_  
City/State/Zip: \_\_\_\_\_
- 4. Primary contact regarding this information: Ronnie Charles
- 5. Telephone Number: 651.234.0848
- 6. Email Address: Ronnie.Charles@ajg.com

**C. Development Entity.** The Development entity named above is:

- A sole proprietorship — Soc. Sec. # \_\_\_\_\_
- A corporation — FID # 36-4291971
- A nonprofit or charitable institution or corporation — FID # \_\_\_\_\_
- A partnership \_\_\_\_\_ — FID # \_\_\_\_\_
- A business association or a joint venture — FID # \_\_\_\_\_
- A limited liability company — FID # \_\_\_\_\_
- A Federal, State, or local government or instrumentality thereof
- Other / explain: \_\_\_\_\_



**D. Date and State of Organization.** If the Contractor is not an individual or a government agency or instrumentality:

1. Date of organization: Corporation established April 20, 1999

2. State of organization: Delaware

**E. Contractor Principals.** Names of owners, officers, directors, trustees, and principal representatives of the development entity

Name, Title, Address, ZIP Code	Description of interest/relationship	% of Ownership Interest
BlackRock, Inc., 55 East 52nd Street, New York, NY 10022		9.1%
The Vanguard Group, 100 Vanguard Blvd., Malvern, PA 19355		6.9%
JPMorgan Chase & Co., 270 Park Ave., New York, NY 10017		6.7%

**F. Contractor Affiliations.** Is the Contractor a subsidiary or parent of or affiliated with, any other corporation or corporations or any other firm or firms?

Yes       No

If Yes, provide the following information:

Corporation/Firm	Relationship to Contractor	Common Officers/Directors/Owners/ Trustees/Representatives
Name Arthur J. Gallagher Address 2850 Golf Rd, Rolling Meadows, IL 60008	Parent Company	J. Patrick Gallagher Jr. Chairman of the Board and Chief Executive Officer
Name Address		

If the Contractor is different than the parent corporation or firm, will the parent corporation or firm guarantee performance under this proposal? N/A

Yes       No

**G. Bankruptcy.** Has the Contractor or the parent corporation (if any), or any subsidiary or affiliated corporation of the Contractor or said parent corporation, or any of the Contractor’s officers or principal members, shareholders or investors filed for bankruptcy, either voluntary or involuntary, within the past 10 years?

Yes       No

If Yes, provide the following information:

Name	Court	Date	Status

**H. Loan Defaults.** Has the Contractor or the parent corporation (if any), or any subsidiary or affiliated corporation of the Contractor or said parent corporation, or any of the Contractor’s officers or principal members, shareholders or investors defaulted on a loan or other financial obligation? *(attach additional sheets if needed)*

Yes       No

If Yes, explain: \_\_\_\_\_

**I. Criminal Litigation.** Is the Contractor or the parent corporation (if any), or any subsidiary or affiliated corporation of the Contractor or said parent corporation, or any of the Contractor’s officers or principal members, shareholders or investors party to any past or pending criminal litigation?

Yes       No

If Yes, provide the following information, and attach any additional information or explanation deemed necessary:

Date Filed	Court	Charge/Current Status

**J. Civil Litigation.** Is the Contractor or the parent corporation (if any), or any subsidiary or affiliated corporation of the Contractor or said parent corporation, or any of the Contractor’s officers or principal members, shareholders or investors party to any pending civil litigation that could potentially impact the financial capability of the Contractor to complete the proposed development?

Yes       No

If Yes, provide the following information, and attach any additional information or explanation deemed necessary:

Date Filed	Court	Current Status

**K. Conflict of Interest.** Does any member or employee of the City of Forest Park, Georgia have any direct or indirect personal interest in the Contractor or in the redevelopment or rehabilitation of the property being proposed by the Contractor?

Yes       No

If Yes, explain:

**L. Source of Financing.** Provide an itemization of planned or likely sources of funds to be used to cover Contractor’s obligations under the project.

1. Provide a copy of a letter of interest from potential lenders, or
2. Provide any other evidence of Contractor’s ability to obtain debt financing.
3. Provide name and address of financial institution reference(s).

**M. Financial Condition.** Provide an audited financial statement for each of the previous two years presented in accordance with generally accepted accounting principles and accompanied by an unqualified opinion of certified public accountants. If the date of this audited financial statement precedes the date of this submission by more than six months, also attach an interim balance sheet not more than 60 days old.

**N. Previous Forest Park Projects.** Has the Contractor or its parent entity (if any), or any subsidiary or affiliated entity of the Contractor or said parent corporation, or any of the Contractor’s officers or principal members, shareholders or investors had any previous contractual relationship with the City of Forest Park?

Yes       No

Project Name	Description	Date

**O. Additional Information.** Attach any additional evidence deemed helpful to demonstrate the Contractor's financial capacity and capability to complete the project.

**CERTIFICATION**

I \* Ronnie Charles certify under penalty of perjury under the laws of the State of Georgia that I am authorized to submit this information on behalf of the Contractor and that the statements made in this Proposal are true and correct. I further authorize the City of Forest Park, Georgia, or any employee or agent acting on behalf of the City of Forest Park, Georgia, to undertake any investigation deemed appropriate to verify the information contained herein.

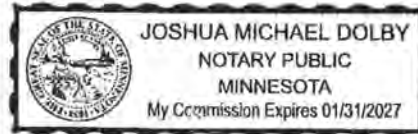
Signature of Authorized Officer or Agent



Ronnie Charles, National Managing Director & Practice Leader  
Printed Name and Title of Authorized Officer or Agent

SUBSCRIBED AND SWORN BEFORE ME  
ON THIS THE 2 DAY OF January, 2024.

Joshua Dolby  
NOTARY PUBLIC



My Commission Expires: 1/31/2027

\* If the Contractor is an individual, this statement should be signed by such individual; if a partnership, by one of the partners; if a corporation or other entity, by one of its chief officers having knowledge of the facts required by this statement.


**FORM 4**

**Acknowledgement of Insurance**

I Ronnie Charles on behalf of Gallagher Benefit Services, Inc. ("Proponent"), acknowledge that if selected as the successful Proponent for (enter project name and number) RFP No. 11092023 Comprehensive Classification Analysis & Compensation Study, Proponent shall comply with all insurance requirements for the project listed above and any other attachments to the RFP which pertain to insurance.

Proponents understands that it is expected to share these requirements with potential sureties and insurance brokers, agents, underwriters, etc. prior to the award of a contract and to take all necessary steps to ensure compliance with the applicable requirements without delay. The Proponent understands, acknowledges and agrees that any failure to fully comply with the insurance requirements within 10 days of the date the Proponent receive a final contract.

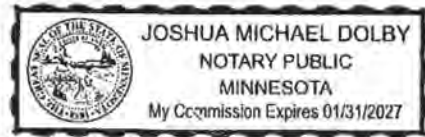
By executing this Acknowledgement of Insurance, I represent that the Proponent understands and agrees to comply unconditionally with all requirements. I represent that I am authorized to make the representation contained herein on behalf of the Proponent.

Signature of Authorized Officer or Agent 

Ronnie Charles, National Managing Director & Practice Leader  
Printed Name and Title of Authorized Officer or Agent

SUBSCRIBED AND SWORN BEFORE ME  
ON THIS THE 2 DAY OF January, 2024.

Joshua Dolby  
NOTARY PUBLIC



My Commission Expires: 1/31/2027

**FORM 5**

**ACKNOWLEDGMENT OF ADDENDA**

The undersigned Proponent hereby acknowledges receipt of the following Addenda:

<u>Addendum Number</u>	<u>Dated</u>	<u>Acknowledge Receipt</u> (initial)
1	12/11/2023	RC
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

**No addenda were received:**

Acknowledged for: Gallagher Benefit Services, Inc.  
(Name of Proponent)

By:   
(Signature of Authorized Representative)

Name: Ronnie Charles  
(Print or Type)

Title: National Managing Director & Practice Leader

Date: January 2, 2024

**Required Submittal (FORM 6)  
Contact Directory**

**Proponent Name:** Gallagher Benefit Services, Inc.

NAME	POSITION/TITLE (JV Relationship, if applicable) *	MAILING ADDRESS	PHONE NUMBER	EMAIL ADDRESS
Ronnie Charles	National Managing Director & Practice Leader	5516 Falmouth Street Richmond, VA 23230	651.234.0848	Ronnie_Charles@ajg.com
Beverly Moultrie	Principal Consultant	8 Cadillac Drive Creekside Crossing Brentwood, TN 37027	651.234.0855	Beverly_Moultrie@ajg.com

The purpose of the Offeror Contact Directory is to provide the City with a centralized, easily identified source of important contacts and other information regarding each of the business entities constituting an Offeror. This Offeror Contact Directory must include the names, positions/titles, firms, mailing addresses, phone and fax numbers and e-mail addresses for at least one (1) primary contact, and names, positions, titles of at least one (1) secondary contact, where applicable, authorized to represent the firm for purposes of this solicitation.

*\*Joint Ventures established less than three (3) years must include at least one (1) primary contact for each member.*



**Required Submittal (FORM 7)**  
**Reference List**

Each Offeror must provide a list of at least three (3) references. The references provided shall not be from the same project and must be able to attest to an Offeror’s performance ability and credibility in a particular industry or trade. The City may also consider the information obtained through other sources. Past and present performance information will be utilized to determine the quality of the Offeror’s past and present performance as it relates to the probability of success for this Project.

**Reference No. 1**

**Project Name:** Classification and Compensation Study

**Owner/Client of Project:** PRINCE WILLIAM COUNTY, VA

**Contact Name/Title:** Angela Poetzman, Project Manager

**Address:** 1 County Complex Court, Suite 155

**City:** Woodbridge **State:** VA **Zip Code:** 22192

**Phone Number:** 703.792.6102 **Email:** Angela.Poetzman@pwcgov.org

**Description of Services:** Classification and Compensation Study

**Total Amount of Contract Including Change Orders:** \$155,000

**Offeror’s Role and Responsibilities:** Classification and Compensation Study

**Current Completion Status:** Complete

**Reference No. 2**

**Project Name:** Compensation and Pay Equity

**Owner/Client of Project:** CITY OF AUSTIN, TX

**Contact Name/Title:** Bryan Dore, Compensation Manager

**Address:** 301 West Second Street

**City:** Austin **State:** TX **Zip Code:** 78701

**Phone Number:** 512.974.3216 **Email:** bryan.dore@austintexas.gov

**Description of Services:** Compensation and Pay Equity

**Total Amount of Contract Including Change Orders:** \$65,000 compensation study, \$44,500 pay equity study

**Offeror’s Role and Responsibilities:** Compensation and Pay Equity Study

**Current Completion Status:** Complete

**Required Submittal (FORM 7)**  
**Reference List (cont.)**

**Reference No. 3**

**Project Name:** Compensation Study

**Owner/Client of Project:** HENRICO COUNTY, VA

**Contact Name/Title:** Yvette George, Human Resources Director

**Address:** 4301 East Parham Road

**City:** Henrico **State:** VA **Zip Code:** 23228

**Phone Number:** 804.501.7202 **Email:** geo029@henrico.us

**Description of Services:** Compensation Study

**Total Amount of Contract Including Change Orders:** \$100,000

**Offeror's Role and Responsibilities:** Compensation Study

**Current Completion Status:** Complete

**FORM 8**  
**SCHEDULE OF CONTRACT FULLY BURDENED LABOR RATES**

**(Non- Applicable for this project)**

**PROPONENT NAME:** \_\_\_\_\_

<b>Position</b>	<b>Raw Rate</b>	<b>Multiplier</b>	<b>Fully Burdened Labor Rate</b>

<sup>1</sup> Actual salary paid to employees of the Joint Venture Companies - proof of payment is required upon Contract award and invoicing.

<sup>2</sup> Fully Burdened Labor Rate - The actual cost paid or incurred by a company that is directly attributable to maintaining an employee including the employee's salary, statutorily required taxes, insurance, contributions, assessments, etc. as well as customary benefits provided to the company's employees per the company's printed policies such as medical and health benefits, sick leave, vacation, holidays, pensions, etc. The fully burdened labor rate also includes any consideration for overhead but NOT profit. The Joint Venture blended overhead apportioned to this contract is accounted by a multiplier applied to the raw rates which results in the Fully Burdened labor Rate. The City reserves the right to audit this multiplier. The fully burdened labor rates shall be used in the preparation of all Task Orders and Change Orders.

**FORM 9**

**Fee Acknowledgement Letter**

**(Non- Applicable for this project)**

**FORM 10**  
**NON-COLLUSION AFFIDAVIT**

The undersigned proponent or agent, being duly sworn on oath, says that he/she has not, nor has any other member, representative, or agent of the firm, company, corporation or partnership represented by him, entered into any combination, collusion or agreement with any person relative to the price to be bid by anyone at such letting nor to prevent any person from bidding nor to include anyone to refrain from bidding, and that this bid is made without reference to any other bid and without any agreement, understanding or combination with any other person in reference to such bidding. He/She further says that no person or persons, firms, or corporation has, have or will receive directly or indirectly, any rebate, fee gift, commission or thing of value on account of such sale.

I HEREBY AFFIRM UNDER THE PENALTIES FOR PERJURY THAT THE FACTS AND INFORMATION CONTAINED IN THE FOREGOING RESPONSE ARE TRUE AND CORRECT.

Dated this 2 day of January, 2024

Gallagher Benefit Services, Inc.  
(Name of Organization)


Ronnie Charles  
(Print Name)

National Managing Director & Practice Leader  
(Title)

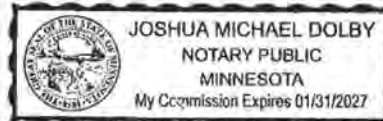
  
(Signature)

Before me, a Notary Public, personally appeared the above named and swore that the statements contained in the foregoing document are true and correct.

Subscribed and sworn to me this 2 day of January, 2024

  
Notary Public Signature

My Commission Expires: 1/31/2027



**FORM 11**  
**CERTIFICATION REGARDING DEBARMENT, SUSPENSION, AND OTHER**  
**MATTERS**

The Proposer, Gallagher Benefit Services, Inc., certifies to the best of its knowledge and belief, that it and its principals:

1. Are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from covered transactions by any Federal, State, or local department or agency;
2. Have not within a three-year period preceding this Proposal been convicted of or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, State or local) transaction or Contract under a public transaction; violation of Federal or State antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property;
3. Are not presently indicted for or otherwise criminally or civilly charged by a governmental entity (Federal, State, or local) with the commission of any of the offenses enumerated in paragraph (2) of this certification; and
4. Have not within a three-year period preceding this application/Proposal had one or more public transactions (Federal, State, or local) terminated for cause or default.

Where the proposer is unable to certify to any of the statements in this certification, such proposer shall attach an explanation to this Proposal.

The proposer certifies or affirms the truthfulness and accuracy of the contents of the statements submitted on or with this certification.

*Ronnie Charles*  
Signature of Authorized Agent

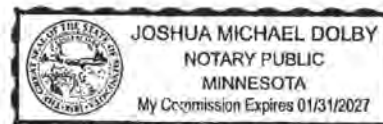
Ronnie Charles, National Managing Director & Practice Leader  
Name/Title of Authorized Agent

Before me, a Notary Public, personally appeared the above named and swore that the statements contained in the foregoing document are true and correct.

Subscribed and sworn to me this 2 day of January, 2024.

*Joshua Dolby*  
Notary Public Signature

My Commission Expires: 1/31/2027 [SEAL]



**FORM 12**

**TRADE SECRET STATUS**

**Attachment A**

**Local, Small, Business Diversity  
Program**

**LSBD Forms (1-6)**



### **Local Small Business Diversity Program**

The City of Forest Park has implemented a Local, Small Business, Diversity Program to promote full and open competition in all city contracts. LSBSD participation goals are set on a contract-by-contract basis for each specific prime contract with subcontracting possibilities. The City wants to ensure that Proponents are non-discriminatory in their process of selecting sub-contractors. The City also wants to encourage Proponents to utilize local, veteran-owned, minority, women, and disadvantaged business enterprises whenever possible.

Included in this proposal are subcontracting/subconsultant forms that all proponents will be required to complete along with their Proposals. All forms included in this solicitation must be completed for Proponent to be considered responsive.

Each Proponent must propose to achieve the LSBSD participation goal that is equal or greater than the percentage required. Each Proponent will be required to submit evidence demonstrating that "good faith efforts" were made if you cannot meet the goal.

These forms are requirements under the City of Forest Park's Local, Small Business, Diversity Program, and it is a requirement to comply with making the "good faith effort" to achieve the goal. Failure to complete these forms will deem you non-responsive.

#### **The participation goal for this procurement is 25 percent (25%)**

A business is considered Local if they meet the following:

1. The business or supplier must operate and maintain a regular place of business within the geographical boundaries of the city;

The business or supplier must provide a copy of a current occupational tax certificate;

The business or supplier must have paid all real and personal taxes (if any) owed the city and not otherwise owe the city any funds; and

The business or supplier must certify its compliance with the Georgia Security and Immigration Act.

A Small Business means a locally based business whose average annual gross receipts or number of employees averaged over the past five years must not exceed the size standards as defined pursuant to 15 C.F.R § 121.201 et al., who demonstrates that individual owner's personal net worth and does not exceed \$750,000.00, exclusive of the individual's ownership interest in their primary residence and the value of the LSBSD.

LSBSD Required Forms –

**To be submitted with Bid:**

1. **LSBD-1 Covenant of Non-Discrimination**: The signed agreement stating that the firm will not discriminate on the basis of a firm's size (revenue or employee count) with regard to prime contracting, subcontracting, or partnering opportunities.
2. **LSBD-2 Sub-Contractor Contact Form**: A list of all firms contacted to participate as LSBD sub-contractors/suppliers on a contract.
3. **LSBD-3 LSBD Sub-Contractor/Supplier Utilization Form**: A list of all firms procured as LSBD sub-contractors/suppliers to be utilized on a contract.
4. **LSBD-4 Statement of Good Faith Efforts (Including the Checklist)**: Documented efforts to seek and procure the utilization of LSBD's as sub-contractors/suppliers on a contract where a goal is required.

**To be submitted post-award:**

5. **LSBE-5 Post Award Monthly LSBD Participation Report – Contract Goal**: Report detailing percentage of LSBD participation (work performed) and payments to VOB/MBE/WBE/DBE subcontractors on a monthly basis.
6. **LSBD-6 Request for Subcontractor Removal/Substitution Form**: Required to fill out and obtain approval if a LSBD subcontractor is being substituted following post award.

**Supplements**

1. Form LSBD-1, Covenant of Non-Discrimination
2. Form LSBD-2, Sub-Contractor Contact Form – Contract Goal
3. Form LSBD-3, Local, Small Business, Diversity Project Participation Plan
4. Form LSBD-4, Statement of Good Faith Efforts
5. Form LSBD-5, Post-Award-Monthly LSBD Participation Report Contract Goal
6. Form LSBD-6, Subcontractor Removal/Substitution Form

**FORM LSBD-1**


**COVENANT OF NON-DISCRIMINATION**

The undersigned understands that it is the policy of the City of Forest Park (COFP) to promote full and equal business opportunity for all persons doing business with the City. The undersigned covenants that we have not discriminated on the basis of a firm's revenue, employee count, social or economic disadvantages, minority, gender, or veteran status, with regard to prime contracting, subcontracting or partnering opportunities. The undersigned further covenants that we have completed truthfully and fully the required forms LSBD-2, LSBD-3 and LSBD-4. Set forth below is the signature of an officer of the Bid entity with the City of Forest Park to bind the entity.

I, Ronnie Charles, National Managing Director & Practice Leader (Name, Title), on behalf of (Company), Gallagher Benefit Services, Inc. by my signature below, do hereby promise:

1. To adopt the policies of the City of Forest Park relating to equal opportunity in contracting on projects and contracts funded, in whole or in part, with funds of COFP;
2. Not to otherwise engage in discriminatory conduct; To provide a discrimination-free working environment;
3. That this Covenant of Non-Discrimination shall be continuing in nature and shall remain in full force and effect without interruption; and
4. That this Covenant of Non-Discrimination shall be incorporated by reference into any contract or portion thereof which we may hereafter obtain.

We understand that our failure to satisfactorily discharge any of the promises of non-discrimination as made and set forth herein shall constitute a material breach of contract.

By: 

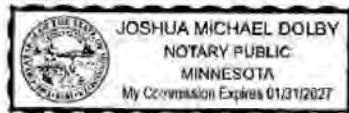
Title: National Managing Director & Practice Leader

Sworn to and subscribed before me the 2 day of January, 2024.

Notary Public: 

My Commission Expires: 1/31/2027

[SEAL]



**FORM LSBD-2****SUB-CONTRACTOR CONTACT FORM – CONTRACT GOALS****Instructions to Contractors**

The prime contractor must complete and sign the sub-contractor **contact form** and submit the completed and signed form with the proposal. **Failure to submit this form will result in being deemed nonresponsive.**

1. Name of contractor/supplier: Provide name of the contractor or supplier you contacted to perform on the task order.
2. Contact Name, Address and Phone Number: Provide the contact information of the contractor/supplier you contacted.
3. City of Forest Park Business License: State if the contractor/supplier you contacted is a City of Forest Park Licensed business.
4. Type or work solicited for: Describe the type of work for which you are soliciting from the contractor/supplier.
5. Business Ownership (Enter Code): State whether the contractor/supplier you contacted is an MBE – Minority Business Enterprise, DBE – Disadvantaged Business Enterprise, WBE – Women Business Enterprise, or VOB – Veteran Owned Business **(if applicable)**
6. Results of Contact: Describe the results of your contact.
7. **Sign and date the form.**

**FORM LSBD-2**

**CITY OF FOREST PARK**

**SUBCONTRACTOR CONTACT FORM**

List all subcontractors or suppliers (*LSBE and Non-LSBD*) that were contacted regarding this project

Name of Sub-Contractor/Supplier	Company Name, Address, Email, and Phone Number	City of Forest Park Business License? (Yes or No)	Type of Work Solicited For	Business Ownership (Enter Code)	Results of Contact
John Smith	Company ABC 123 Main Street Morrow, GA 30260 jsmith@email.com 770-123-4698	Yes	Hauling	DBE	Will perform as sub

**Diversity Code: MBE – Minority Business Enterprise, DBE – Disadvantaged Business Enterprise, WBE – Women Business Enterprise, VOB – Veteran Owned Business (Sample)**

**FORM LSBD-2**  
**CITY OF FOREST PARK**  
**SUBCONTRACTOR CONTACT FORM**

Name of Sub-Contractor/Supplier	Company Name, Address, and Phone Number	City of Forest Park Business License? (Yes or No)	Type of Work Solicited For	Business Ownership (Enter Code)	Results of Contact
<b>Gallagher does not, and will not, use any subcontractors to deliver services to the City. All the consulting analyses and assistance we provide are furnished by staff employed by Gallagher.</b>					

List all subcontractors or suppliers (*LSBE and Non-LSBD*) that were contacted regarding this project  
**Diversity Code: MBE – Minority Business Enterprise, DBE – Disadvantaged Business Enterprise, WBE – Women Business Enterprise, VOB – Veteran Owned Business**

Local, Small Business, Diversity Form (Page 1 of 2)

FORM LSBD-2

**SUB-CONTRACTOR CONTACT FORM – Cont’d**

List all sub-contractors or suppliers (LSBD and Non-LSBD) that were contacted regarding this project

Name of Sub-Contractor/Supplier	Company Name, Address, and Phone Number	City of Forest Park Business License? (Yes or No)	Type of Work Solicited For	Business Ownership (Enter Code)	Results of Contact

Proponent's Name: Gallagher Benefit Services, Inc. Project Name: Comprehensive Classification Analysis & Compensation FC#: \_\_\_\_\_

Signature:  Contact No: RFP No. 11092023 Date: 1/2/2024

Local, Small Business, Diversity Form (Page 2 of 2)

**FORM LSBD-3****LOCAL, SMALL BUSINESS, DIVERSITY OPPORTUNITY SUBCONTRACTOR  
PROJECT PLAN****SUBCONTRACTOR/SUPPLIER UTILIZATION****Instructions to Contractors**

The Proponent must complete the project participation plan for sub-contractor/supplier utilization and **submit the form with the Bid. Failure to submit this form will result in a Bid being deemed “nonresponsive”**. Each project participation plan for sub-contractor/supplier must include the following:

1. Name of subcontractor/supplier: Provide name of the subcontractor or supplier contacted to perform work on the project.
2. Contact Name, Address & Phone Number: Provide contact information of the subcontractor/supplier contacted.
3. City of Forest Park Business License: State if the subcontractor/supplier contacted is a City of Forest Park licensed business.
4. Type or Scope of Work to be Performed: Describe the type or scope of work subcontractor/supplier will perform.
5. Certification of Business Owner: Provide minority code/classification (if applicable). Examples include, but not limited to: Minority Business Enterprise (MBE), Disadvantaged Business Enterprise (DBE), Women Business Enterprise (WBE), Veteran Owned Business (VOB), etc.
6. Estimated Dollar Value of Work: Provide an estimated dollar value for the work to be performed by subcontractor/supplier within the project scope.
7. Percentage of Total Bid Amount: Provide an estimated percentage of the total Bid amount that will be paid to the subcontractor/supplier.
8. Signature of Proponent: All LSBD Participation Plans must be signed and dated by Proponents.

**Estimated Dollar Value of the Work / Total Bid Amount = % of Total Bid Amount**





**FORM LSBID-3**

**CITY OF FOREST PARK LOCAL, SMALL BUSINESS, DIVERSITY OPPORTUNITY SUBCONTRACTOR PROJECT PLAN  
SUBCONTRACTOR/SUPPLIER UTILIZATION**

List all subcontractors/suppliers, including lower tiers, to be used on this project.

Name of Sub-Contractor/Supplier	Company Name, Address, Email, and Phone Number	City of Forest Park Business License? (Yes or no)	Type of Work to be Performed	Owner of Business (See code below)	Dollar (\$) Value of Work	Percentage of Total Bid Amount
John Smith	Company ABC 123 Main Street Forest Park, GA 30297 jsmith@email.com 770-123-4698	Yes	Hauling	DBE	\$4200	8.4%

Total Local Business, % \_\_\_\_\_ Total Small Business % \_\_\_\_\_ Total Minority Business % \_\_\_\_\_

Diversity Code: MBE – Minority Business Enterprise, DBE – Disadvantaged Business Enterprise, WBE – Women Business Enterprise, VOB – Veteran Owned Business

Proponent's Company Name: \_\_\_\_\_ Date: \_\_\_\_\_ FC#: \_\_\_\_\_

Proponent's Contact Number: \_\_\_\_\_ Project Name: \_\_\_\_\_

Signature: \_\_\_\_\_

Sample



FORM LSBD-3

**CITY OF FOREST PARK LOCAL, SMALL BUSINESS, DIVERSITY OPPORTUNITY SUBCONTRACTOR PROJECT PLAN  
SUBCONTRACTOR/SUPPLIER UTILIZATION**

List all subcontractors/suppliers, including lower tiers, to be used on this project.

Name of Sub-Contractor/Supplier	Company Name, Address and Phone Number	City of Forest Park Business License? (Yes or no)	Type of Work to be Performed	Owner of Business (See code below)	Dollar (\$) Value of Work	Percentage of Total Bid Amount
<p><b>Gallagher does not, and will not, use any subcontractors to deliver services to the City. All the consulting analyses and assistance we provide are furnished by staff employed by Gallagher.</b></p>						

Total Local Business, % 0 Total Small Business % 0 Total Minority Business % 0

Diversity Code: MBE – Minority Business Enterprise, DBE – Disadvantaged Business Enterprise, WBE – Women Business Enterprise, VOB – Veteran Owned Business

Proponent's Company Name: Gallagher Benefit Services, Inc. Date: 1/2/2024 FC#: FEIN 36-4291971

Proponent's Contact Number: FFP No. 11092023 Project Name: Comprehensive Classification Analysis & Compensation Study

Signature: 



**FORM LSBD-4**

**STATEMENT OF GOOD FAITH EFFORTS**

Instructions:

If you will not meet the Local Small Business Diversity (LSBD) goal set forth in the RFQB, in addition to the information included on the LSBD Form 2 Sub-contractors Contact Form submitted with your bid/proposal, please provide a narrative explanation of why you cannot meet the LSBD goal and the steps taken to include LSBDs in your bid/proposal. Describe specific actions (i.e. phone calls, etc.). Please provide copies of any solicitation notices sent, whether by email, fax or mail, and the amount of time given for response. Describe efforts to follow up initial communications. Identify the individuals from your organization who performed these activities. Attach additional pages as needed.

**CERTIFICATION OF GOOD FAITH EFFORTS**

I hereby attest that I have exercised good faith efforts to meet the Local Small Business Diversity goal for this bid. Despite such good faith efforts, I have not been able to meet the LSBD goal for this bid.

Gallagher Benefit Services, Inc.  
\_\_\_\_\_  
(Name of Organization)

Ronnie Charles  
\_\_\_\_\_  
(Print Name)

National Managing Director & Practice Leader  
\_\_\_\_\_  
(Title)

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

January 2, 2024  
\_\_\_\_\_  
(Date)

**FORM LSB-D-4 (Cont'd)**  
**STATEMENT OF GOOD FAITH EFFORTS**  
**Checklist**

A Proponent that does not meet COFP’s LSB-D participation goal is required to demonstrate that it made “good faith efforts.” Please indicate whether or not any of the following actions were taken:

- |     | <b>Yes</b>               | <b>No</b>                |  |
|-----|--------------------------|--------------------------|--|
| 1.  | <input type="checkbox"/> | <input type="checkbox"/> | Attendance at a pre-bid meeting, if any, scheduled by COFP to inform LSB-Ds of subcontracting opportunities under a given solicitation; Advertisement for solicitation of LSB-Ds in general circulation media, trade association publications, and minority- focus media, to provide notice of subcontracting opportunities.   |
| 2.  | <input type="checkbox"/> | <input type="checkbox"/> | Advertisement in general circulation media at least seven (7) days prior to Bid or Bid opening any and all Sub-contractor opportunities. Proof of advertisement must be submitted with the Bid or Bid.   |
| 3.  | <input type="checkbox"/> | <input type="checkbox"/> | Provided interested LSB-Ds with timely, adequate information about the plans specifications, and other such requirements of the Contract to facilitate their quotation and conducted follow up to initial solicitations.   |
| 4.  | <input type="checkbox"/> | <input type="checkbox"/> | Provided written notice to LSB-Ds that their interest in subcontracting opportunities or furnishing supplies is solicited. Provided a contact log showing the name, address, email and contact number (phone or fax) used to contact the proposed certified sub- contractors, nature of work requested for quote, date of contact, the name and title of the person making the effort, and the amount of the quoted price if one was obtained.   |
| 5.  | <input type="checkbox"/> | <input type="checkbox"/> | Efforts were made to divide the work for LSB-D subcontracting in areas likely to be successful and identify portions of work available to LSB-Ds consistent with their availability. Include a list of divisions of work not subcontracted and the corresponding reasons for not including them. The ability or desire of a Proponent/Bidder to perform the work of a contract with its own organization does not relieve it of the responsibility to make good faith efforts on all scopes of work subject to subcontracting. |
| 6.  | <input type="checkbox"/> | <input type="checkbox"/> | Efforts were made to assist potential LSB-D sub-contractors to meet bonding, insurance or other governmental contracting requirements. Where feasible, facilitating the leasing of supplies or equipment when they are of such a specialized nature that an LSB-D could not readily and economically obtain them in the marketplace.   |
| 7.  | <input type="checkbox"/> | <input type="checkbox"/> | Utilization of services of available minority community organizations, minority contractor groups and other organizations that provide assistance in the recruitment and placement of LSB-Ds.  |
| 8.  | <input type="checkbox"/> | <input type="checkbox"/> | Communication with the COFP Procurement Department seeking assistance in identifying available LSB-Ds.   |
| 9.  | <input type="checkbox"/> | <input type="checkbox"/> | Exploration of joint venture opportunities with LSB-Ds.  |
| 10. | <input type="checkbox"/> | <input type="checkbox"/> | Other actions (specify):   |

Please explain any “no” answers listed above (by number):

**Gallagher does not, and will not, use any subcontractors to deliver services to the City. All the consulting analyses and assistance we provide are furnished by staff employed by Gallagher.**

*This list is a guideline and by no means exhaustive. The City of Forest Park will review these efforts, along with other documents, towards assessing the Proponent/Bidder's efforts to meet COFP's LSBSD goal. If you require assistance in identifying certified LSBSDs, please contact the Procurement Department at [procurement@forestparkga.gov](mailto:procurement@forestparkga.gov) or at 404-366-4720.*

**FORM LSBD-5****POST AWARD MONTHLY LSBD PARTICIPATION REPORT –  
CONTRACT GOAL****Instructions to Contractors**

The prime contractor must complete the **participation report** and submit the form with each pay application to the COFP Department Project Manager in charge of the contract. **Failure to submit this form will result in payment application being deemed incomplete.**

1. **Report Number:** Reports must be consecutively numbered. It will only be necessary to submit a report in a period when the approved VOB/MBE/WBE/DBE has performed a portion of the work that has been designated for the contract.
2. **Date:** Actual date of the report.
3. **Pay application period end date:** Reports must acknowledge the end date for the period for which is being reported.
4. **VOB/MBE/WBE/DBE Amount:** The amount of the contract for which the VOB/MBE/WBE/DBE will earn.
5. **Prior Earned Pay Application Amount:** The amount previously submitted for payment on pay application.
6. **Current Earned Pay Application Amount:** The amount submitting with current payment application.
7. **Earnings To-Date:** The actual amount that each VOB/MBE/WBE/DBE has earned to-date under the contract.
8. **Percent of Contract:** This percentage is calculated using the contract amount and the total VOB/MBE/WBE/DBE earnings-to-date. Divide the total contract amount by the total VOB/MBE/WBE/DBE earnings-to-date.
9. **Certification:** The contractor's authorized representative must sign this form prior to submittal.

**GENERAL INFORMATION**

When the approved VOB/MBE/WBE/DBE is to provide materials, goods or services, this completed form must be submitted to the COFP Department Project Manager. The prime contractor must notify COFP of any changes to VOB/MBE/WBE/DBE firms.

When the prime contractor is an approved LSBD, it will only be necessary to complete the total LSBD earnings to-date. Joint ventures between non-LSBD and certified LSBD: Only that portion of the work for which the LSBD is responsible may be used to satisfy the requirement.

**It is not necessary to complete this form if there are no subcontracting opportunities available for the use of VOB/MBE/WBE/DBE firms.**

**FORM LSB-D-5  
POST AWARD – LSB-D PARTICIPATION REPORT – CONTRACT GOAL**

PROJECT NO. (S): \_\_\_\_\_

REPORT NO.: \_\_\_\_\_

CONTRACTOR: \_\_\_\_\_

DATE: \_\_\_\_\_

CONTRACT AMOUNT: \$ \_\_\_\_\_

PAY APPLICATION PERIOD END DATE: \_\_\_\_\_

Check if final payment >>>  FINAL PAYMENT

% LSB-D GOAL \_\_\_\_\_

VOB/MBE/WBE/DBE AMOUNT \$: \_\_\_\_\_

NAME OF APPROVED VOB/MBE/WBE/DBE	DESCRIPTION OF WORK	PRIOR EARNED PAY APPLICATION AMOUNT	CURRENT EARNED PAY APPLICATION AMOUNT	EARNINGS TO-DATE

TOTAL VOB/MBE/WBE/DBE EARNINGS TO-DATE: \_\_\_\_\_

% CONTRACT: \_\_\_\_\_

I HEREBY CERTIFY THAT THE ABOVE STATEMENT IS TRUE AND CORRECT AND SUPPORTING DOCUMENTATION IS ON FILE AND IS AVAILABLE FOR INSPECTION BY COFP AT ANY TIME.

SIGNED \_\_\_\_\_ CONTRACTOR

REMARKS \_\_\_\_\_

**FOR DEPARTMENT USE ONLY:**

THIS DOCUMENT HAS BEEN REVIEWED AT THAT PROJECT LEVEL BY:

SIGNED \_\_\_\_\_ TITLE \_\_\_\_\_

THIS DOCUMENT HAS BEEN REVIEWED AT THE PROGRAM LEVEL BY:

SIGNED \_\_\_\_\_ TITLE \_\_\_\_\_

**FORM LSBD-6**

**Request for Subcontractor Removal/Substitution**

**Prior to submitting this form to the Procurement Department you must notify the LSBD in writing of your intent and allow the LSBD five (5) days to respond.**

Request Date:		Contract/Project #:	
Contract Value:	LSBD Contract Amount:	Amount Paid to LSBD:	
Prime Contractor Name:			
Prime Contractor Address:			
Prime Contact Name:	Prime Contact Email:	Prime Contact Phone:	
Name of LSBD Firm:		LSBD Contact Name:	
LSBD Firm Address:	LSBD Email:	LSBD Phone:	

Was LSBD firm given five (5) days written notice of intent?  Yes or  No If yes, please attach written notice.

Will the LSBD goal for the project still be met?  Yes or  No or  N/A

Reason(s) for removal/substitution. **Check all that apply**

- The listed LSBD is no longer in business.**
- The listed LSBD requested removal.**
- The listed LSBD failed or refused to perform under the terms of the contract or failed to furnish the listed materials.**
- The work performed by the listed LSBD was unsatisfactory and was not in accordance with the scheduled specifications.**

Name/Address of Substitution Contractor:	Is the substituted contractor an LSBD? <input type="checkbox"/> Yes or <input type="checkbox"/> No
Fully describe the type of work the substitute subcontractor will perform:	
Prime Authorized Signature:	Date:
Approved <input type="checkbox"/> Rejected <input type="checkbox"/>	Reason for rejection:
Procurement Manager Authorized Signature:	Date:





City of Forest Park Classification and Compensation Study

**Addendum 1**  
**Issued December 11, 2023**  
**RFP NO. 11092023**

***Acknowledgement of receipt of this addendum MUST BE SIGNED AND INCLUDED IN YOUR RESPONSE TO THE RFP.***

1. In review of RFP No. 11092023 for the City of Forest Park's Classification Analysis and Compensation Study, can you please clarify how many classes/job titles are to be included in the review? Also, are there any unionized positions to be included?

**Answer: The City of Forest Pak currently has 125 classes/job titles to be included in the review. Currently, there are no union positions to be included.**

2. On page 15, instructions state that proposals should be divided into three components, one of which is the Performance Evaluation System. However, the scope of that component is not outlined on pages 10-13. Is the Performance Evaluation System design or modification part of the project?

**Answer: The Performance Evaluation System is a modification.**

3. How many jobs does the project encompass?

**Answer: There a total of 40 Classifications (Paygrades); and 283 active employees (includes full-time, part-time and seasonal).**

4. Does the City have any union employees? If so, will the study include them?

**Answer: The City of Forest Park has no union employees.**

  
SIGNATURE

Gallagher Benefit Services, Inc.  
COMPANY NAME

National Managing Director &  
Practice Leader  
TITLE

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12/11/2023  
DATE

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Gallagher is pleased to submit this proposal to you. While this proposal is not meant to constitute a formal offer, acceptance, or contract, notwithstanding anything to the contrary contained in the proposal, Gallagher is submitting this proposal with the understanding the parties would negotiate and sign a contract containing terms and conditions that are mutually acceptable to both parties.

This material was created to provide accurate and reliable information on the subjects covered by should not be regarded as a complete analysis of these subjects. It is not to provide specific legal, tax or other professional advice. The services of an appropriate professional should be sought regarding your individual situation.

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