

Jefferson Parish

SOQ No. 24-027

To Provide Professional Services to Update and Provide a Comprehensive Wage and Salary Survey for The Classified Pay Plan

July 9, 2024

Mr. Ronnie Charles, SPHR, GPHR, IPMA-SCP

National Managing Director & Practice Leader | Public Sector & Higher Education

651.234.0848 | Ronnie_Charles@ajg.com

Mr. Erik Smetana, MBA, SPHR, SHRM-SCP, SWP

Managing Director & Operations Leader | Public Sector & Higher Education

314.494.4849 | Erik_HenrySmetana@ajg.com

Gallagher Benefit Services, Inc. | ajg.com



Gallagher

Insurance | Risk Management | Consulting

Cover Letter

July 9, 2024

PERSONAL & CONFIDENTIAL

Shanna Folse
Purchasing Specialist II
Jefferson Parish Purchasing Department
General Government Building
200 Derbigny Street, Suite 4400
Gretna, LA 70053

Dear Shanna:

We appreciate the opportunity to present this proposal regarding services Gallagher's Human Resources & Compensation Consulting practice can offer Jefferson Parish. Gallagher is highly capable and qualified to work with Jefferson Parish based on our extensive experience with public sector organizations across the country. We would consider it a privilege to serve Jefferson Parish in this capacity.

It is our understanding that Jefferson Parish is seeking a Statement of Qualifications from persons or firms interested in providing professional services to update a prior wage and salary survey that was conducted from 2020 to 2022 and provide a wage and salary survey for the classified Pay Plan for the East Bank Consolidated Special Service Fire Protection District of Jefferson, Louisiana.

We believe we will provide Jefferson Parish 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 perspective provided by our team ensure we anticipate any issues Jefferson Parish may face throughout this project, as well as the ongoing management of the updated classification and compensation system.

We have prepared the following proposal in response to your request. We appreciate having the opportunity to submit this proposal and look forward to assisting Jefferson Parish in this engagement.

Sincerely,



Ronnie Charles, SPHR, GPHR, IPMA-SCP
National Managing Director & Practice Leader
651.234.0848 | Ronnie_Charles@ajg.com

5516 Falmouth Street
Richmond, VA 23230



Erik Smetana, MBA, SPHR, SHRM-SCP, SWP
Managing Director & Operations Leader
314.494.4849 | Erik_HenrySmetana@ajg.com

8 Cadillac Drive, Creekside Crossing
Brentwood, TN 37027

Value Proposition:

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’ve 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.

Sustained growth. Steady focus on quality.

Founded in
1927

The Gallagher Way

25 tenets that have guided a
team-oriented culture for 30+ years

Social Responsibility

Companywide focus on ethical conduct, employee health and welfare, environmental integrity and community service

\$9.9B

Total Adjusted Brokerage &
Risk Management Revenues
2023

52,000+

960+

130+

Global Reach.
Local Presence.

Shared Values + Passion of
Excellence = Promises Delivered

The high standards of conduct we've 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.

#3

OUR TENET

We push for professional excellence.

The Gallagher Way. Since 1927,

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 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:

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

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 comply with 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. We serve clients across an array of strategic and value-adding HR services with **classification and compensation as a core specialty**.

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.**



Experience

Case Studies:

We have completed over 500 classification and compensation studies for municipalities in the last 10 years. The following case studies show our specific experience in conducting similar studies for other government organizations. The experience we have gained in conducting these studies will inform our analyses and recommendations Jefferson Parish.

CITY OF LEXINGTON, NC

Beginning in 2023, the City collaborated with Gallagher to conduct a comprehensive classification and compensation study. The classification study included Gallagher reviewing updated job descriptions and working with Human Resources to clarify any roles that needed additional information. Once that information was reviewed, Gallagher utilized the information to develop a new classification structure for the City and Gallagher consultants assigned job evaluation ratings to all classifications. For the comprehensive compensation study, Gallagher worked with the City to determine what positions should be included in a custom survey sent to 29 comparator organizations. For positions that are cross industry, Gallagher utilized published survey sources to market price some positions. The analyzed information was then used to create salary structures for general employees, police and fire that were internally equitable and externally competitive. Upon the completion of the study, Gallagher reviewed the data with the City's project team and incorporated feedback into the draft and final reports. Recommendations with implementation options were provided to the project team and shared with City Leadership.

CLAY COUNTY, IA

In 2023, the County engaged with Gallagher to conduct a classification and compensation study, which included the development of a compensation strategy, job evaluation using employee questionnaires, employee interviews and panels. Gallagher consultants used this collective information to develop a simplified and flexible class structure and assigned job evaluation ratings to all classifications. For the comprehensive compensation study, Gallagher worked with the County to deliver a custom survey that was sent to 19 comparator organizations. For positions that are cross industry, Gallagher utilized published survey sources to market price positions. This analysis was used to develop a pay structure with implementation costs and best practices guidance to move through the structure and remain competitive with the market. Upon the completion of the study, Gallagher reviewed the data with the County's project team and incorporated feedback into the draft and final reports. Recommendations shared with County Leadership.

CITY OF BLOOMINGTON, IL

The City collaborated with Gallagher to conduct a comprehensive classification and compensation study. The classification study included Gallagher reviewing updated job descriptions and working with Human Resources to clarify any roles that needed additional information. Once that information was reviewed, Gallagher utilized the information to revise the City's current classification structure. Gallagher consultants closed this phase by assigning job evaluation ratings to all classifications. For the comprehensive compensation study, Gallagher worked with the City to determine what positions should be included in a custom survey sent to 29 comparator organizations. For positions that are not easily found in the public sector, Gallagher utilized published survey sources to market price these positions. The analyzed information was then used to create a salary structure that was internally equitable and externally competitive. Upon the completion of the study, Gallagher reviewed the data with the City's project team and incorporated feedback into the draft and final reports. Recommendations with implementation options were provided to the project team. Final presentations were made to the City's leadership team.

PRINCE WILLIAM COUNTY, VA

The County collaborated with Gallagher to conduct a comprehensive classification, compensation, and pay equity study. The classification study included Gallagher assisting the County in the administration of a Position Description Questionnaire (PDQ) to gather information about each employee's respective role. Gallagher also interviewed a sample of employees in an effort to gain clarity where needed. Once that information was received and reviewed, Gallagher consultants utilized the information to create a new classification structure and classification descriptions for the resulting classifications. Gallagher consultants closed this phase by assigning job evaluation ratings to all classifications. For the comprehensive compensation study, Gallagher consultants worked with the County to determine what positions should be included in a custom survey that was sent to 25 comparator organizations. For positions that are not easily found in the public sector, Gallagher consultant's utilized published survey sources to market price these positions. The analyzed information was then utilized to create a salary structure that was internally equitable and externally competitive.

Gallagher consultants also performed a pay equity study for the County to identify potential pay disparities on the basis of race, age or gender. Upon the completion of the analysis, Gallagher consultants reviewed the data with the County's project team and incorporated feedback into the draft and final reports. Recommendations with implementation options were provided to the project team. Final presentations were made to leadership team and to the County's Board.

CITY OF RALEIGH, NC

The City collaborated with Gallagher to conduct a classification and compensation redesign study that began in June 2016. The objectives of this study included:

- Review duties and responsibilities of current jobs and employees to develop a new classification system.
- Develop new classification specifications.
- Evaluate jobs for internal value relationships.
- Collect market compensation data from private and public organizations.
- Develop a new/revised compensation system that is externally competitive and internally equitable.
- Review and update compensation policies and practices.
- Develop a transition plan.

The classification review was conducted to assess the types and levels of work across all jobs in the City and provide recommendations for an updated, simplified, and sustainable classification system. The more than 700 current City job classes were consolidated by type and level of work into an updated class system that incorporated approximately 260 job classes across 34 job families. The type and level of work for each class was rated using the Decision Band Method® job evaluation tool. Class specifications addressing the type and level of work for each job consistent with the approved class structures were developed. Employees were allocated to the new class systems based on PDQs and management input.

A customized data collection instrument was developed to collect pay data on each of the benchmark classifications from the City's national and local labor market. Survey data was analyzed to develop four separate pay structures tailored for specific groups of employees, which was coordinated with the job evaluation results. Structures consisted of broad-banded open ranges and step structures. Gallagher provided implementation cost options for the City's consideration. In addition, pay practice, classification, and compensation policy recommendations were provided to the City.

HENRICO COUNTY, VA

In the November of 2022, Gallagher was engaged to conduct a compensation study for Henrico County covering 779 job classifications, covering 11,250 full time and part time employees. This study included collecting market data on as many of the job titles as possible through the use of published survey sources to analyze and evaluate all data in an objective manner and make recommendations designed to assist Henrico County in attracting, recruiting, and retaining top performing talent. Gallagher also provided recommendations to update Henrico County's compensation system to facilitate effective use and maintenance of the County's updated compensation structure.

CITY OF AUSTIN, TX

Beginning in 2016, we initiated an ongoing working relationship with the City - including the conduct of multiple function-specific pay equity studies, comprehensive compensation studies including but not limited to executive positions, emergency management, and currently the execution of studies focused on non-sworn police positions and mobility services roles as well as studies focused on COVID-19 workforce impacts and council member and staff compensation and classification. Recent and ongoing studies focus on pay equity, compensation, and organizational/administrative review. In 2016, 2018, and 2019, the City hired Gallagher to conduct a comprehensive evaluation of pay equity in comparison to its prior studies to identify if there are any pay equity issues in the organization. We conducted detailed statistical analysis of the current pay levels and identified possible pay equity issues at both organizational and department levels. The objective of the analysis was to determine if there were indications of systematic pay disparities between employees of different race or gender, isolate specific areas as possible, and identify key contributing factors. In 2017, we were hired to assist the City with a review and assessment of the compensation strategy and conduct a compensation study for the Human Resources and Legal departments. In 2019, Gallagher conducted another custom salary survey for the City. In 2020, we were engaged to conduct compensation studies for the Forensic positions and City-wide Executive positions. Since 2021, we've been engaged to conduct a series of studies focused on pay equity, post-Covid workforce impacts, classification and compensation, and administrative/organizational reviews.

References:

Contact names and phone numbers are listed for each project. These projects are relevant to demonstrating our ability to meet the needs of Jefferson Parish 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 Jefferson Parish is requesting.

CAMPBELL COUNTY FIRE DEPARTMENT

106 Rohan Avenue, Gillette, WY 82716

Ryan Fox, MS, EFO, Division Chief
307-682-5319, rfox@ccfire.us

Jeff Bender, Fire Chief
307-680-2109

CITY OF RUSTON, LA

401 North Trenton Street, Ruston, LA 71270

Julie Keen, Finance Director
318-251-8651, JulieKeen@RustonLA.gov

WEST UNIVERSITY PLACE, TX

3800 University Boulevard, West University Place, TX 77005

James Urban, Human Resources Director
713-662-5816, jurban@westutx.gov

CITY OF WOLFFORTH, TX

302 Main Street, Wolfforth, TX 79382

Terri Robinette, City Secretary
806-855-4120, trobinette@wolfforthtx.us

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

Proposed Fees

Our fees to conduct the study outlined above (including out-of-pocket expenses) will be \$33,500. The table below outlines the price.

| Phase |
|--|
| <p>PHASE 1: Study Administration *</p> <p><i>Includes virtual meeting and ongoing project management meetings throughout.</i></p> <p><i>On-site meetings are available at an additional cost*</i></p> |
| <p>PHASE 2: Compensation Study **</p> |
| <p>PHASE 3: Project Finalization, Draft & Final Reports</p> <p><i>Includes virtual meeting; On-site meetings are available at an additional cost *</i></p> |
| <p>TOTAL COST (inclusive of all tasks) will not exceed: \$33,500</p> |

**On-site meetings are available at an additional cost.*

***Should Jefferson Parish request Gallagher to update/write job descriptions, those services will be priced separately since we are unable to determine the number that will be required. Pricing would be \$550 per job description and is in addition to the "Total Cost" identified above.*

Our study costs are directly derived from estimating the number of hours needed to perform the work and the level of the consultant charged with performing the work. Gallagher typically bills monthly up to the maximum of each deliverable. Please note, as phases sometimes run concurrently, a phase may not be completed at the time it is billed. All expenses are included in this quote. Should Jefferson Parish wish to have additional on-site presentation days or meetings, the estimated cost would be \$4,000 per day.

Any change to the scope of the assignment (beyond what is described above) as well as other work requested beyond this assignment will be billed based on our hourly rates unless we mutually agree on a fixed fee for the additional work.

Qualifications of 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
- PHR and SPHR from the Human Resources Certification Institute
- SHRM-CP and SCP from the Society for Human Resource Management
- SWP and HCS from the Human Capital Institute
- 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 of experience

Ronnie leads Gallagher's public sector & higher education 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, the State of Virginia, and the 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.

ERIK HENRY-SMETANA, MBA, SHRM-SCP, SPHR, SWP, Managing Director & Operations Leader - 20 years of experience

Erik manages operations for Gallagher's public sector & higher education Human Resources & Compensation Consulting practice. Erik's 20-plus-year work history has led him to serve in various 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 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. Before joining Gallagher, he served as the enterprise-wide Deputy CHRO with the University of Missouri System and Vanderbilt University as the Executive Director of People & Engagement, leading, designing, and implementing compensation and people-focused programs and initiatives.

PROJECT LEADERSHIP & LEADERSHIP SUPPORT

MICHAEL BURTON, Principal Consultant - 20 years' experience

With over two decades of experience in the field of compensation and benefits, he brings a wealth of knowledge and expertise that spans various industries, including utilities, business services, educational institutions, pharmaceuticals, and financial services. His career journey has equipped him with a deep understanding of total rewards strategies, enabling him to design and manage innovative programs that attract, retain, and motivate top talent. Michael has a proven record of accomplishment of crafting and implementing intricate compensation and benefits programs tailored to meet the unique needs of diverse organizations. Whether it's developing competitive compensation structures, designing executive and variable incentive plans, or managing comprehensive benefits packages, Michael has consistently delivered solutions that align with business goals while ensuring fairness and transparency.

BEVERLY MOULTRIE, SPHR, IMPA-SCP, Principal Consultant - 25 years of experience

Beverly has over 25 years of professional human resources experience in all facets of HR Operations including 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 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.

LARRY ROBERTSON, Senior Consultant - 26 years of experience

Larry's 27-plus-year work history includes a variety of roles that included compensation, human resources information systems, and recruiting as well as serving in a primary leadership role as acting vice president for human resources for several months. Larry has experience in both private and public sectors, working in a manufacturing environment before moving to higher education for the 21 years prior to 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 of 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 Resources from the Society of Human Resource Management.

DEREK SMITH, PhD, Senior Consultant - 15 years of 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's of Science, a Master's of Business Administration, and a PhD in Public Policy and Leadership. He has earned professional certifications with the Human Resources Certification Institute (PHR), the Society for Human Resource Management (SHRM-CP), and the Korn Ferry Leadership Architect.

ALLEN JOHANNING, Senior Consultant - 15 years of experience

Allen has nearly 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 of experience

Ms. Thorp 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.

ZAK SHTULBERG, Senior Consultant – 12 years of experience

Since starting as an HR consulting intern at Buck (now Gallagher) in 2012, Zak has been mission-driven and passionate about collaboration with clients and partners on transformative people, compensation, and other HR initiatives that improve the lives of employees and their communities. Projects have spanned a broad spectrum, including compensation strategy design, change management and communications, workforce planning, project management, analytics and technology enablement, and organization design, among many others. With both internal and external partners, he is recognized for blending strategic and technical advice with innovative analytics and technology and grown as a trusted partner and subject matter expert in HR and compensation. Prior to starting his career, he earned a Bachelor of Science in Industrial and Labor Relations from Cornell University.

PROJECT STAFF SUPPORT**CHARMAIN KOHLER, Consultant II - 10 years of 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.

TRACY MORRIS, Consultant II - 7 years of experience

Tracy has 7 years of 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).

JAIME PARKER, Consultant II - 15 years of 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.

CHAU TRAN, Consultant II- 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 of 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.

LUCILLE ZHANG, Consultant - 2 years of 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 Novellis, 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.

PRISCILA CANDAL, MA, Associate Consultant - 8 years of 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.

MARY GAUTHE, SHRM-CP, Associate Consultant - 5 years of 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.

KEVIN GRANGER, Senior Analyst - 12 years of 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.

AMBER SHANG, MA in I/O Psychology, Associate Consultant - 2 years of 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.

TERESA NGUYEN, MS, Senior Analyst - 2 years of 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.

CARISSA MARTO, MA in I/O Psychology, Senior Analyst - 2 years of 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.

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 of 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.

JOY PHILLIPS, MA, Analyst - 2 years of 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.

Approach to the Project

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 significant experience has resulted in a comprehensive understanding of the scope of work described by Jefferson Parish. 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, followed by our approach to the areas identified by Jefferson Parish, our detailed work plan, and the 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 take into consideration 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 the pay ranges and there is potential for creating or increasing pay compression

Our Approach:

- **Job Description Review**
We will review existing job documentation for consistency in format and accuracy in job functions. We will use the current job descriptions provided by Jefferson Parish to review and revise the current classification structure. If there are concerns or questions on the descriptions, we will follow-up with discussions with Human Resources, management, or employees to ensure our understanding of the job responsibilities. Through this work we will ensure appropriate job matches and internal alignment in the potential salary structures. Additionally, we can make recommendations on job description content to ensure compliance with applicable laws and regulations.

- **Internal Equity**
We will work with Jefferson Parish to evaluate each job title with the current job evaluation methodology to determine internal equity. Our project plan and cost reflect reviewing all Jefferson Parish job titles and ensuring internal consistency and accuracy of job functions. We have significant experience in applying job evaluation methods but will work with Jefferson Parish to ensure our understanding of the method and the jobs. In many cases, we will verify the current evaluations of Jefferson Parish and ask follow-up questions to clarify any questions.
- **Market Comparison**
We will work with Jefferson Parish to identify benchmark job classes for the purposes of competitive market analysis. We will survey both current rates of pay, minimum and maximum rates of pay, in addition to the relevant benefits and the employer and employee cost. We will also integrate private sector salary information in the market comparison process from survey sources that represent the local area market.
- **Salary Structure Development & Implementation Analysis**
To develop a reliable salary structure, we integrate market data and custom survey results with the internal equity ratings from job evaluation, 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 Jefferson Parish and allows for employee development and contribution to goal achievement. Up to three implementation scenarios will be provided to Jefferson Parish. These resulting pay structures and implementation scenarios will be reviewed to ensure a gender and race neutral system.
- **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 Jefferson Parish 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 Jefferson Parish now or in the future. Gallagher has integrated the Scope of Services into our phased approach and deliverables to address Jefferson Parish’s requests. All phases will require that designated Jefferson Parish - team members and Gallagher have ongoing status meetings to explain the process, review the project's progress, review draft materials, address questions, and discuss next steps.

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 Jefferson Parish’s current classification system. Discussion of Jefferson Parish’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 Jefferson Parish.

PHASE 2: COMPENSATION STUDY

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

CUSTOM SURVEY

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

Benchmark jobs identified and summarized (includes one [1] round of client revision).

Benefit and pay practice questions determined for inclusion in the custom survey. Custom survey developed and conducted (includes two [2] rounds of client revision).

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 Jefferson Parish. The Jefferson Parish approves the updates to the pay plan(s) and other recommendations and implementation options.

Provide Jefferson Parish with up to three (3) transition options, recommendations, and next steps/ongoing maintenance (includes one round of client revision).

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 Jefferson Parish.

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.

Projected Time Frame

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 deadlines for the project at that time. We will conduct frequent conference calls with Jefferson Parish to ensure the schedule is monitored throughout the project.

In today's world, speed is very important. However, given the significance of this project, it is just as important for Jefferson Parish 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 to ensure Jefferson Parish has the 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 | Compensation Study | Project Finalization, Draft & Final Reports |
| 1 | | | |
| 2 | | | |
| 3 | | | |
| 4 | | | |
| 5 | | | |
| 6 | | | |

Contractual Considerations

Gallagher is pleased to submit this proposal to Jefferson Parish. 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.
- STANDARD INSURANCE REQUIREMENTS FOR BIDDING PURPOSES (PDF pages 8-9) - 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 blue ink that reads 'Ronnie Charles'.

Ronnie Charles, SPHR, GPHR, IPMA-SCP
National Managing Director & Practice Leader
651.234.0848 | Ronnie_Charles@ajg.com

A handwritten signature in blue ink that reads 'Erik Smetana'.

Erik Smetana, MBA, SPHR, SHRM-SCP, SWP
Managing Director & Operations Leader
314.494.4849 | Erik_HenrySmetana@ajg.com

Statement of Qualifications Affidavit

Statement of Qualifications

AFFIDAVIT

STATE OF Minnesota

PARISH/COUNTY OF Hennepin

BEFORE ME, the undersigned authority, personally came and appeared: _____

Erik Smetana, (Affiant) who after being by me duly sworn, deposed and said that he/she is the fully authorized Managing Director & Operations Leader of Gallagher Benefit Services, Inc. (Entity), the party who submitted a Statement of Qualifications (SOQ) to Provide Professional Services to Update and Provide a Comprehensive Wage and Salary Survey for The Classified Pay Plan (Briefly describe the services the SOQ will cover), to the Parish of Jefferson.

Affiant further said:

Campaign Contribution Disclosures

(Choose A or B, if option A is indicated please include the required attachment):

Choice A _____ Attached hereto is a list of all campaign contributions, including the date and amount of each contribution, made to current or former elected officials of the Parish of Jefferson by Entity, Affiant, and/or officers, directors and owners, including employees, owning 25% or more of the Entity during the two-year period immediately preceding the date of this affidavit or the current term of the elected official, whichever is greater. Further, Entity, Affiant, and/or Entity Owners have not made any contributions to or in support of current or former members of the Jefferson Parish Council or the Jefferson Parish President through or in the name of another person or legal entity, either directly or indirectly.

Choice B X there are **NO** campaign contributions made which would require disclosure under Choice A of this section.

Affiant further said:

Debt Disclosures

(Choose A or B, if option A is indicated please include the required attachment):

Choice A _____ Attached hereto is a list of all debts owed by the affiant to any elected or appointed official of the Parish of Jefferson, and any and all debts owed by any elected or appointed official of the Parish to the Affiant.

Choice B X _____ There are **NO** debts which would require disclosure under Choice A of this section.

Affiant further said:

Solicitation of Campaign Contribution Disclosures

(Choose A or B, if option A is indicated please include the required attachment):

Choice A _____ Attached hereto is a list of all elected officials of the Parish of Jefferson, whether still holding office at the time of the affidavit or not, where the elected official, individually, either by **telephone or by personal contact**, solicited a campaign contribution or other monetary consideration from the Entity, including the Entity's officers, directors and owners, and employees owning twenty-five percent (25%) or more of the Entity, during the two-year period immediately preceding the date the affidavit is signed. Further, to the extent known to the Affiant, the date of any such solicitation is included on the attached list.

Choice B X _____ there are **NO** solicitations for campaign contributions which would require disclosure under Choice A of this section.

Affiant further said:

Subcontractor Disclosures

(Choose A or B, if option A is indicated please include the required attachment):

Choice A _____ Affiant further said that attached is a listing of all subcontractors, excluding full time employees, who may assist in providing professional services for the aforementioned SOQ.

Choice B X _____ There are **NO** subcontractors which would require disclosure under Choice A of this section.

Affiant further said:

That Affiant has employed no person, corporation, firm, association, or other organization, either directly or indirectly, to secure the public contract under which he received payment, other than persons regularly employed by the Affiant whose services in connection with the construction, alteration or demolition of the public building or project or in securing the public contract were in the regular course of their duties for Affiant; and

[The remainder of this page is intentionally left blank.]

That no part of the contract price received by Affiant was paid or will be paid to any person, corporation, firm, association, or other organization for soliciting the contract, other than the payment of their normal compensation to persons regularly employed by the Affiant whose services in connection with the construction, alteration or demolition of the public building or project were in the regular course of their duties for Affiant.



Signature of Affiant

Erik Smetana

Printed Name of Affiant

SWORN AND SUBSCRIBED TO BEFORE ME

ON THE 8 DAY OF July, 2024.



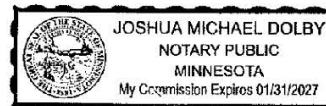
Notary Public

Joshua Dolby

Printed Name of Notary

Stamped

Notary/Bar Roll Number



My commission expires 01/31/2027.

STANDARD INSURANCE REQUIREMENTS FOR BIDDING PURPOSES

All required insurance under this bid shall conform to Jefferson Parish Resolution No. 113646 or No. 113647, as applicable. Contractors may not commence any work under any ensuing contract unless and until all required insurance and associated evidentiary requirements thereto have been met, along with any additional specifications contained in the **Invitation to Bid**. Except as where otherwise precluded by law, the Parish Attorney or his designee, with the concurrence of the Director of Risk Management or his designee, may agree on a case-by-case basis, to deviate from Jefferson Parish's standard insurance requirements, as provided in this Section. Vendors requesting deviation therefrom shall submit such requests in writing, along with compelling substantiation, to the Purchasing Department prior to the bid's due date. Any changes to the insurance requirements will be reflected in the bid specifications and addenda. Prior to contract execution and at all times thereafter during the term of such contract, contractors must provide and continuously maintain all coverages as required by the foregoing Resolutions, and the contract documents. Failure to do so shall be grounds for suspension, discontinuation or termination of the contract.

For bidding purposes, bidders must submit with bid submission a current (valid) insurance certificate evidencing the required coverages. Failure to comply will cause bid to be rejected. The current insurance certificate will be used for proof of insurance at time of evaluation. Thereafter, and prior to contract execution, the low bidder will be required to provide final insurance certificates to the Parish which shall name **the Jefferson Parish, its Districts Departments and Agencies under the direction of the Parish President and the Parish Council** as additional insureds regarding negligence by the contractor for the Commercial General Liability and the Comprehensive Automobile Liability policies. Additionally, said certificates should reflect the name of the Parish Department receiving goods and services and reference the respective Jefferson Parish bid number.

JEFFERSON PARISH REQUIRED STANDARD INSURANCE

☒ WORKER'S COMPENSATION INSURANCE

As required by Louisiana State Statute, exception; Employer's Liability, Section B shall be \$1,000,000 per occurrence when Work is to be over water and involves maritime exposures to cover all employees not covered under the State Worker's Compensation Act, otherwise this limit shall be no less than \$500,000 per occurrence.

Note: If your company is not required by law to carry workmen's compensation insurance, i.e. not a Louisiana company, sole employee of the company, then bidders must request a workmen's compensation insurance declaration affidavit prior to the bid opening date. This insurance declaration affidavit must be fully completed, signed, properly notarized and submitted with the bid. A scanned copy may be submitted with the bid; however, the successful bidder must submit the original affidavit in its original format and without material alteration upon contract execution. Failure to comply will result in the bid submission being

rejected as non-responsive. The Parish reserves the right to award bid to the next lowest responsive and responsible bidder in this event.

☒ **COMMERCIAL GENERAL LIABILITY**

Shall provide limits not less than the following: \$1,000,000.00 Combined Single Limit per Occurrence for bodily injury and property damage.

☒ **COMPREHENSIVE AUTOMOBILE LIABILITY**

Bodily injury liability \$1,000,000.00 each person; \$1,000,000.00 each occurrence.
Property Damage Liability \$1,000,000.00 each occurrence.

Note: This category may be omitted if bidders do not/will not utilize company vehicles for the project or do not possess company vehicles. Bidder must request an automobile insurance declaration affidavit prior to the bid opening date. This insurance declaration affidavit must be fully completed, signed, properly notarized and submitted with the bid. A scanned copy of the completed, signed and properly notarized affidavit may be submitted with the bid; however, the successful bidder must submit the original affidavit in its original format and without material alteration upon contract execution. Failure to comply will result in the bid submission being rejected as non-responsive. The Parish reserves the right to award bid to the next lowest responsive and responsible bidder in this event.

DEDUCTIBLES - The Parish Attorney with concurrence of the Director of Risk Management have waived the deductible section of the Terms and Conditions for all Invitations to Bid, until further notice.

UMBRELLA LIABILITY COVERAGE

An umbrella policy or excess may be used to meet minimum requirements.

FOR CONSTRUCTION AND RENOVATION PROJECTS:

The following are required if selected below. Such insurance is due upon contract execution.

☐ **OWNER'S PROTECTIVE LIABILITY**

To be for the same limits of liability for bodily injury and property damage liability established for commercial general liability.

☐ **BUILDER'S RISK INSURANCE**

The contractor shall maintain Builder's Risk Insurance at his own expense to insure both the owner (Parish of Jefferson) and contractor as their interest may appear.

General Professional Services Questionnaire

General Professional Services Questionnaire

A. Project Name and Advertisement Resolution Number:

SOQ No. 24-027

B. Firm Name & Address:

Gallagher Benefit Services, Inc.

2850 Golf Rd, Rolling Meadows, IL 60008

C. Name, title, & contact information of Firm Representative, as defined in Section 2-926 of the Jefferson Parish Code of Ordinances, with at least five (5) years of experience in the applicable field required for this Project:

Erik Smetana, MBA, SPHR, SHRM-SCP, SWP
Managing Director & Operations Leader
314.494.4849 | Erik_HenrySmetana@ajg.com

8 Cadillac Drive, Creekside Crossing
Brentwood, TN 37027

D. Address of principal office where Project work will be performed:

8 Cadillac Drive, Creekside Crossing
Brentwood, TN 37027

E. Is this submittal by a JOINT-VENTURE? Please check:

YES _____ NO **X**

If marked "No" skip to Section H. If marked "Yes" complete Sections F-G.

F. If submittal is by JOINT-VENTURE, list the firms participating and outline specific areas of responsibility (including administrative, technical, and financial) for each firm. Please attach additional pages if necessary.

1.

2.

General Professional Services Questionnaire

| G. Has this JOINT-VENTURE previously worked together? Please check: YES _____ NO _____ | | |
|--|-------------------|---|
| H. List all subcontractors anticipated for this Project. Please note that <u>all subcontractors must submit a fully completed copy of this questionnaire</u>, applicable licenses, and any other information required by the advertisement. See Jefferson Parish Code of Ordinances, Sec. 2-928(a)(3). Please attach additional pages if necessary. | | |
| Name & Address: | Specialty: | Worked with Firm Before (Yes or No): |
| 1. N/A | | |
| 2. | | |
| 3. | | |
| 4. | | |
| 5. | | |

General Professional Services Questionnaire

| |
|--|
| I. Please specify the total number of support personnel that may assist in the completion of this Project: <u>25</u> |
| J. List any professionals that may assist in the completion of this Project. If necessary, please attach additional documentation that demonstrates the employment history and experience of the Firm's professionals that may assist in the completion of this Project (i.e. resume). Please attach additional pages if necessary. |
| PROFESSIONAL NO. 1 |
| Name & Title: RONNIE CHARLES, SPHR, GPHR, IPMA-SCP - National Managing Director |
| Name of Firm with which associated: Gallagher Benefit Services, Inc. |
| Description of job responsibilities: Ronnie leads Gallagher's public sector & higher education Human Resources & Compensation Consulting practice. Review of deliverables prior to submitting to the client. Provide project sponsorship and engage regularly with client project sponsors. |
| Years' experience with this Firm: 30 years of experience 10 years with the firm |
| Education: Degree(s)/Year/Specialization: Ronnie earned his B.S. in Management from Saint Paul's College. He is also a graduate of Virginia's Executive Institute, Harvard University's HR Program on Negotiation, and the University of California Los Angeles (UCLA) Advanced Program in Human Resources. |
| Other experience and qualifications relevant to the proposed Project: 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, the State of Virginia, and the 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. |

General Professional Services Questionnaire

| PROFESSIONAL NO. 2 |
|---|
| Name & Title: ERIK HENRY-SMETANA, MBA, SHRM-SCP, SPHR, SWP, Managing Director & Operations Leader |
| Name of Firm with which associated: Gallagher Benefit Services, Inc. |
| Description of job responsibilities: Erik manages operations for Gallagher's public sector & higher education Human Resources & Compensation Consulting practice. Review of deliverables prior to submitting to the client. Provide project sponsorship and engage regularly with client project sponsors. |
| Years' experience with this Firm: 20 years of experience 2.5 years with the firm |
| Education: Degree(s)/Year/Specialization: Erik has a Bachelor's degree in Psychology, an MBA, and Master's degree in Writing. He has previously earned professional certifications with the Human Resources Certification Institute (SPHR), Society for Human Resource Management (SHRM-SCP), and the Human Capital Institute (Strategic Workforce Planner and Human Capital Strategist). |
| Other experience and qualifications relevant to the proposed Project: Erik's 20-plus-year work history has led him to serve in various 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 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. Before joining Gallagher, he served as the enterprise-wide Deputy CHRO with the University of Missouri System and Vanderbilt University as the Executive Director of People & Engagement, leading, designing, and implementing compensation and people-focused programs and initiatives. |

Please review the 'Qualifications of Key Personnel' section in the body of our proposal

General Professional Services Questionnaire

K. List all prior projects that best illustrate the Firm's qualifications relevant to this Project. Please include any and all work performed for Jefferson Parish. Please attach additional pages if necessary.

PROJECT NO. 1

| Project Name, Location and Owner's contact information: | Description of Services Provided: |
|--|-----------------------------------|
| <p>CAMPBELL COUNTY FIRE DEPARTMENT 106 Rohan Avenue Gillette, WY 82716</p> <p>Ryan Fox, MS, EFO, Division Chief 307-682-5319, rfox@ccfire.us</p> <p>Jeff Bender, Fire Chief 307-680-2109</p> | <p>Total Compensation Study</p> |
| Length of Services Provided: | Cost of Services Provided: |
| <p>6/2023 - 2/2024</p> | <p>\$10,000</p> |

PROJECT NO. 2

| Project Name, Location and Owner's contact information: | Description of Services Provided: |
|--|-----------------------------------|
| <p>CITY OF RUSTON, LA 401 North Trenton Street Ruston, LA 71270</p> <p>Julie Keen, Finance Director 318-251-8651, JulieKeen@RustonLA.gov</p> | <p>Total Compensation Study</p> |
| Length of Services Provided: | Cost of Services Provided: |
| <p>6/2022 - 4/2023</p> | <p>\$75,000</p> |

General Professional Services Questionnaire

| PROJECT NO. 3 | |
|--|--|
| Project Name, Location and Owner's contact information: | Description of Services Provided: |
| <p>WEST UNIVERSITY PLACE, TX 3800 University Boulevard West University Place, TX 77005</p> <p>James Urban, Human Resources Director 713-662-5816, jurban@westutx.gov</p> | <p>Total Compensation and Classification Study</p> |
| Length of Services Provided: | Cost of Services Provided: |
| <p>11/2023 - 6/2024</p> | <p>\$47,000</p> |

| PROJECT NO. 4 | |
|---|--|
| Project Name, Location and Owner's contact information: | Description of Services Provided: |
| <p>CITY OF WOLFFORTH, TX 302 Main Street Wolfforth, TX 79382</p> <p>Terri Robinette, City Secretary 806-855-4120, trobinette@wolfforthtx.us</p> | <p>Total Compensation and Classification Study</p> |
| Length of Services Provided: | Cost of Services Provided: |
| <p>8/2023 - 3/2024</p> | <p>\$55,000</p> |

General Professional Services Questionnaire

L. List all prior and/or on-going litigation between Firm and Jefferson Parish. Please attach additional pages if necessary.

| Parties: | | Status/Result of Case: |
|------------|------------|--|
| Plaintiff: | Defendant: | |
| 1. | | Arthur J. Gallagher & Co. and its affiliates may be involved in multiple actions at any given time that are proportionate in number for a broker of our size and profile. Gallagher treats these matters as confidential, and SEC guidelines prohibit us from providing material information in this RFP response that is not currently disclosed to the public. Any material items are noted in reports to the SEC, which are available on investor.ajg.com under Investor Relations > SEC Filings. However, nobody on the project team assigned is involved in any ongoing lawsuits. |
| 2. | | |
| 3. | | |
| 4. | | |

M. Use this space to provide any additional information or description of resources supporting Firm's qualifications for the proposed project.

We have completed over 500 classification and compensation studies for municipalities in the last 10 years. The experience we have gained in conducting these studies will inform our analyses and recommendations Jefferson Parish. 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 comply with 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. We serve clients across an array of strategic and value-adding HR services with classification and compensation as a core specialty.

We have a strategic alliance with the Public Sector Human Resources Association (PSHRA), the National Public Employers Labor Relations Association (NPFLRA), 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.

N. To the best of my knowledge, the foregoing is an accurate statement of facts.

Signature: Erik Smetana Print Name: Erik Smetana
 Title: Managing Director & Operations Leader Date: July 8, 2024



ajg.com

The Gallagher Way. Since 1927.

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.

Consulting and insurance brokerage services to be provided by Gallagher Benefit Services, Inc. and/or its affiliate Gallagher Benefit Services (Canada) Group Inc. Gallagher Benefit Services, Inc., a non-investment firm and subsidiary of Arthur J. Gallagher & Co., is a licensed insurance agency that does business in California as "Gallagher Benefit Services of California Insurance Services" and in Massachusetts as "Gallagher Benefit Insurance Services."