

**The State Bar of California**

**Workforce Planning and Classification and Compensation Studies  
Request for Proposal: Questions & Responses**

**December 3, 2015**

- 1. In addition to the FTE data provided in the RFP (page 3), please describe current production/ output data the operating procedures, functional descriptions or other documentation that will be provided to the awardee for each of the workforces and activities listed in II.A.1 and II.A.2.**

*In most instances we can provide # of client, # of filings, case processing times, # of calls, call categories/types, # of events, # of trainings, as applicable. We can also identify relevant staff (II.A.2) though their specific FTE apportionment for the specific tasks in II.A.2 is not available. See Bidders' Conference materials for additional details.*

- 2. Is it the State Bar's expectation that the project team will work onsite? May the project team work from a local satellite office of ours?**

*Not entirely, no. Some onsite work at our offices locations will be needed.*

- 3. Should the workforce planning review occur sequentially or concurrently throughout the offices listed?**

*Given the timeframe, concurrently is likely.*

- 4. Can you clarify the timeline/Period of Performance for the project? Page 1 of the RFP indicates "Contract term(s) desired is for a period of one (1) year, with an option to renew for an additional one (1) year term"; however, page 5 indicates " This study must be completed for the Office of the Chief Trial Counsel (only) by the end of April 2016, and no later than October 3, 2016 for all areas".**

*The RFP dates are correct; we would like some flexibility however, to contract with the selected vendor/s for an additional period of time, in the event that further related studies/work is identified, and/or implementation assistance is needed.*

- 5. Of the 150 classifications encompassing 600 regular full-time and part-time employees, how many are covered by collective bargaining agreements?**

*Approximately 500 employees are covered by collective bargaining agreements.*

- 6. In the review of the point factor and grading classification system, will updated job descriptions be available as part of the review process?**

*For some, but not all jobs.*

**7. In conducting the competitive market analysis are we limited to the public sector only?**

*Yes, for salary setting recommendations. However, for some positions, private sector comparisons may be useful, so that the Bar can appropriately understand the labor market pressures faced for some key positions (e.g. IT positions).*

**8. How many individuals are in the group that will be included in the orientation and information sessions?**

*A set number is TBD; orientation meetings are contemplated with Senior Executive Staff (SET) and all staff (one all staff meeting in Los Angeles, and one in San Francisco).*

**9. The Cost Sheet included in the RFP attachments has different set of deliverables, will you be able reissue a relevant cost sheet or should we modify it ourselves?**

*Attached A (cost sheet) is locked and should be used as-is. The scope is the same, but divided into separate deliverables to identify those areas that can be covered by a fixed, not-to-exceed bid from those areas that contain more discovery, where a time and materials approach is more appropriate.*

**10. Our firm is large private limited partnership and does not publish its financial information publicly? Can the “Financial details” section in the Vendor History Questionnaire information be made optional?**

*The attachment is required for evaluation. You may elect to mark the financial portion confidential or submit a non-disclosure agreement with your submission. This information will only be shared with the members of the evaluation team. If not provided, the submission requirements will be scored accordingly.*

**11. What is the current timeframe metric for the Office of the Chief Trial Counsel?**

*Six months from initiation (complaint received or other initiation) to filing in State Bar Court or dismissal.*

**12. Are you open to selecting 2 different vendors for the Workforce Planning and Classification and Compensation Deliverables?**

*Yes, we will consider awarding multiple contracts for all or a portion of the two primary deliverables, based on bidder qualifications and experience. There is no additional scoring advantages provided for those responding to both, but may be some economies of scale from the vendors’ perspective. If awarded to 2 vendors there will be coordination between the firms. The compensation and workforce planning for discipline need to be done in tandem.*

**13. Can you provide the State Audit referenced during the Bidders’ Conference?**

*The audit can be found on the California State Auditor’s site here:  
<https://www.bsa.ca.gov/pdfs/reports/2015-030.pdf>*

**14. Are the Workforce Planning activities outlined under Requirements as 3, 4, 5, 6, 7, 8 and 9 applicable to both discipline and business process reengineering Areas identified above?**

*Yes, applicable to both the departments and the functional areas as indicated in Attachment A.*

**15. Is there a particular survey market that you have identified?**

*We primarily focus on the judicial branch agency market. For court performance metric we use the National Center for State Courts. We may want to work with vendor for selective private sector comparisons for IT, for example.*

**16. Are your employees scattered around the state in multiple locations or in the same building?**

*We have an office in San Francisco and second office in Los Angeles, with the bulk of our discipline (OCTC) in LA, with State Bar Court in both, and the remaining smaller groups in SF.*

**17. Page 4, “workload planning” appears in II.A.8 and II.A.10. Should “workload” be “workforce”? If not, please explain what is expected of the awardee to meet your “workload planning” needs.**

*Yes, it should be workforce.*

**18. For the classification and compensation study, does the State Bar want to continue to use a point factor system for evaluation of positions or is the State Bar open to other approaches such as whole job analysis?**

*The State Bar is open to other approaches.*

**19. Please clarify whether the number of trips outlined in item #5 are the total trips all bidders should assume (for evaluation purposes), or if additional trips are envisioned and should be included. Also, since item #5 instructs bidders “Not to include actual travel expenses.”, where should bidders include estimated travel costs?**

*For evaluation and scoring purposes, we have excluded the actual cost of vendor travel expenses from the calculations for this project. You need not include the cost of travel in this bid. Please just list the home office location so that we may consider this expense during our evaluations. Please use the estimated number of trips for your consultant commitments.*

**20. So that bidders can propose their most senior level consultants for this scope of work, please provide the estimated project budget for Deliverable A (Workforce Planning) and also Deliverable B (Classification & Compensation Study).**

*We do not provide target budgets during competitive bidding offers. Please propose your best candidates for the project scope outlined.*

- 21. If possible, please provide the survey market/agencies that State Bar has used historically.**

*The State Bar has used the Judicial Council/Administrative Office of the Courts, other judicial branch and public sector agencies in metropolitan areas.*

- 22. Regarding insurance requirements: the RFP states: Professional Liability Insurance with a general aggregate limit of Two Million Dollars (\$2,000,000.00) and a per occurrence limit of at least Two Million Dollars (\$2,000,000.00). Our current levels are a general aggregate limit of Two Million Dollars (\$2,000,000.00) and a per occurrence limit of One Million Dollars (\$1,000,000.00). These levels have always sufficed in our 31-year history working with public agencies. Is there a chance that you may be able to reduce your requirement?**

*Please list these limits in your response to the Submission Requirements.*

- 23. As discussed during the bidders conference (and as noted in the RFP, Section II (Statement of Work) “Bidders may opt to propose solutions for one or both primary deliverables, individually or as a joint project.” If bidders opt to propose solutions for both primary deliverables, does the State Bar prefer to have bidders submit one proposal for both primary deliverables or two separate proposals (one for each primary deliverable)?**

*Bidders electing to propose solutions to both deliverables (A and B) may submit them under one cover, sharing Submission Requirements III.A.1-3. Any differences requirements 4. And 5. Should be noted, with completely separate sections form requirements 6. And 7. Submission Requirement 8. Is already separated on Attachment A. Alternately, you may elect to submit complete and separate standalone proposals for each.*

- 24. Of the 5 physical hardcopies requested, how many should be originals and how many should be copies of an original?**

*One original and 4 copies is sufficient.*

- 25. The Vendor History Questionnaire (Attachment B) requests information regarding “Principals” and an “Account Manager.” Does the term “Principal” mean officers of the business (i.e., president, secretary, treasurer) OR principals that will work on the proposed project (i.e., consultants)? Additionally, does the term “Account Manager” refer to the primary point of contact for the proposed project (i.e., project director) OR something else?**

*Under principals, please list officers of the company. Under Account Manager, primary engagement contact.*

- 26. Regarding the required cost form: can you please provide these in MS Excel format so that we can modify them for our submittal?**

*The format is locked to ensure consistency with all proposals. If you have specific issues or need assistance, contact [andrew.conover@calbar.ca.gov](mailto:andrew.conover@calbar.ca.gov).*