



January 11, 2021

The City of El Paso Employees Retirement Trust in El Paso, Texas is conducting a search for a qualified firm to conduct a classification and compensation review. Attached please find a request for proposals. We encourage you to respond to our request for proposals.

In the event you respond to our request for proposal, we must receive your proposal no later than February 5, 2021. If you decide not to submit a proposal please notify our office by January 29, 2021 of your intention not to respond with a proposal.

Should you have any questions regarding our request document please do not hesitate to contact our office at the address and telephone number listed below. We look forward to receiving your proposal in the near future.

Sincerely,

A handwritten signature in blue ink, appearing to read "Robert P. Ash".

Robert Ash
Executive Director

Attachments

1039 Chelsea Street • El Paso, Texas 79903 • (915) 212-0112 • Fax (915) 212-0113

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Trust in a secure future



SOLICITATION FOR A REVIEW OF THE TRUST'S CLASSIFICATION AND COMPENSATION STRUCTURE.

ISSUE DATE: January 11, 2021

RESPONSE DATE: February 5, 2021

CITY OF EL PASO EMPLOYEES RETIREMENT TRUST

SOLICITATION FOR A REVIEW OF CLASSIFICATION AND COMPENSATION STRUCTURE

Background:

The City of El Paso Employees Retirement Trust manages a defined benefit plan for the City of El Paso, Texas. The Trust has been in continuous operation for the past seventy-five years. The Trust currently has approximately four thousand active participants and three thousand four hundred retirees.

The plan document may be located in Section 2.64 of the El Paso Municipal Code. The Trust is managed by a Board of Trustees. The Board of Trustees is a nine member Board with oversight of the administration of the Trust. The Board hires employees to manage the day-to-day activities of the Trust. The Board currently has a staff of eight employees. Four employees are hourly and four employees are salaried. The Trust has a Personnel Policy approved by the Board, which governs the conduct and employee expectations. All employees are contract employees of the Board and not the City of El Paso, Texas. As such, each employee has a contract with the Board of Trustees. Employee contracts identify the initial salary and benefits that have been made available for each employee. Job descriptions exist for each position and a salary scale exists for all employees of the Trust except for the Executive Director/Legal Advisor.

The current Personnel Policy defines, among other things, the types of pay incentives/increases the employees may be eligible to obtain. It also describes the conduct for the staff as well as other aspects of their job.

The Trust desires to conduct this study to address the recruiting, compensation and retention of the Trust's staff. The Trust seeks a qualified firm, which will also provide a study that will include possible recommendations regarding the Trust's current compensation methods and policy. The study should review the current wage scale for each staff position. The study should also review the job descriptions, job titles and duties in relation to the current pay and benefits for each position. A comparison should be made to other defined benefit pension plans both within the State of Texas and in the southwest region. Particular attention should be given to local non-uniformed municipal defined benefit retirement plans of comparable size. The study should review that each position is properly classified as either hourly or exempt under Federal law. The review should also address efficiencies that may be improved by modifying the current manning table.

TABLE OF CONTENTS

SECTION A: Proposal Form	Page 4
SECTION B: Proposal Format	Page 6
SECTION C: Specifications	Page 7
SECTION D: Evaluation Factors	Page 8

SECTION A

PROPOSAL FORM

Your firm's proposal should have the following elements identified by the item numbers below.

Item 1: Proposed fee:

Please provide a fixed fee for the entire study. This fee should include all expenses including any proposed travel, costs to prepare any report(s) and any other expenses to be incurred directly or indirectly in completion of this review. The fee proposal should remain in effect for at least 90-days from the date the proposal is due to the Trust. The Trust is exempt from state sales tax, will not be paid, and should not be included in the fee proposal.

Note: The Trust will not reimburse or be responsible for any and all costs related to the submission of any proposal for any reason.

Item 2: Statement/Scope of Work:

Please provide a statement of work delineating the different areas that will be reviewed, the expected hours for each area to be reviewed and the order in which the statement of work will be undertaken. How would your firm complete the anticipated work?

Item 3: Similar Studies:

Please provide a list of public pension clients for which you have performed this type of requested study.

Item 4: Resources conducting the Study:

Please define your firm's resources for conducting this study.

- a. Number of individuals to be assigned for this study. Provide name and contact information.
- b. Number of hours you expect to spend performing this study detailed by the types of staff employed.
- c. Experience and credentials of the professionals assigned by your firm to complete this study. Identify who is responsible for the proposed engagement.

Item 5: Relevant similar completed work:

Identify the different defined benefit pension plans that you have previously worked with in developing the same or similar studies. Please provide the names and contact information for each of the plans listed.

Please identify if any of the public defined benefit plans listed are from the State of Texas. Please further identify if they were Fire, Police or uniformed defined benefit pension plans.

Identify why your firm differs from your competitors. Please identify other services and competencies, which your firm may have that differentiates your firm from other competitors.

Item 6: Time to complete the Study:

What is the expected time frame required to complete the study and present the final written and oral report to the Board of Trustees? The Trust prefers that the study be completed within 60-days from the

date a contract is signed. However, a proposer may propose a different time to complete the study.

Item 7: Specimen Report:

Please provide a specimen written report that is representative of the reporting format that will be used to report the findings of the study and make recommendations to the Board of Trustees after your study has been completed.

Item 8: Meetings with Board:

The selected firm should be available to meet with the Board of Trustees and the Administrative Services Committee of the Board either in person or by teleconference to discuss the results and explain any recommendations that are proposed as part of the study.

Item 9: Specimen Agreement or contract:

Please include a specimen contract or agreement, which you would propose for the Study. This may be considered, amended or declined by the Trust. If declined a contract will be sent to the proposing firm, which is selected.

Item 10: References:

Please list three (3) firms, which we may contact as references for this study. Please list contact information, name, address, phone number, email, and the number of years you have provided services to each client. Please identify for each reference the type of study or work which was performed as well as the date in which the work was performed.

Only one award will be made to the firm with the best combination of price and qualifications and will be determined in the sole discretion of the City of El Paso Employees Retirement Trust's Board of Trustees.

(See Section D for Evaluation Factors)

Proposing Firm Name: _____

Contact Person: _____

Authorized Signature: _____

Firm phone number and email address: _____

SECTION B

PROPOSAL FORMAT

1. Proposal form with Attachments (Section A).
2. Proposal Letter of Engagement summarizing the proposer's understanding of various components of the study. This letter should include how the study will be completed, the key review activities to be undertaken, the time frame to complete the study, a sample report with a recommendation for a similar review, which your firm has completed. An officer of the firm who can legally bind the firm is required to sign the proposal.

SECTION C

SPECIFICATIONS

1. The City of El Paso Employees Retirement Trust (“the Trust”) is seeking proposals from qualified, responsible independent consulting firms with a focus on compensation and classification of municipal defined benefit retirement plans.
Firms should be able to make clear and concise recommendations in writing and be available to address the Board of Trustees and the Trust’s Administrative Services Committee regarding the results of the study. The Trust’s current organizational chart is attached as Exhibit “A.”
2. The required scope of services should be based upon a comparison of other similarly situated public defined benefit retirement plans and include:
 - a. A review, analysis and possible recommendation regarding current job descriptions, job titles and duties.
 - b. A review, analysis and possible recommendations regarding current employee contracts.
 - c. A review, analysis and possible recommendations regarding current employee benefits and level of benefits.
 - d. A review, analysis and recommendations regarding the classification of employees.
 - e. A review, analysis and recommendations regarding the Trust’s Personnel Policy/Rules regarding compensation and benefits.
 - f. A review, analysis and recommendation regarding the level of employee benefits.
 - g. A review of current policies and procedures with regard to compliance with federal, state and local laws.
3. Provide a detailed written report of the review, analysis, and recommendations for all the areas that were part of the study. Specifics that denote variations between the current compensation and benefits and those of similar retirement plans should be outlined both on an individual basis and in the aggregate.
4. Contract payments will be made in accordance with the final contract for the study. The Trust will not make any advance payments unless otherwise noted in the resulting contract. Payments will be made within 45-days of the receipt of a properly submitted invoice. Invoices should be submitted as follows:

City of El Paso Employees Retirement Trust

Attention: Accounts Payable/David Garcia

1039 Chelsea St.

El Paso, Texas 79903

SECTION D

EVALUATION FACTORS

1. Material exceptions to the terms and conditions of this solicitation, or failure to meet the Trust’s minimum specifications, shall render a proposal as non-responsive and shall not be considered. In addition, proposals, which are longer than 20-pages in length, excluding specimen reports, will be deemed non-responsive and will not be considered.
2. Proposals must be limited to not more than 20-pages excluding an attached contract and specimen report.
3. Only one award will be made under this solicitation. The award shall be made considering all the requirements to the firm with the best combination of price, qualifications and experience as may be determined in the sole discretion of the Board of Trustees of the City of El Paso Employees Retirement Trust, and who is able to demonstrate to the satisfaction of the Board of Trustees that it is able to provide expertise sufficient to execute the terms of this solicitation.
4. The Board of Trustees may consider factors relating to “responsibility” of the proposing firm, including but not limited to, the reputation and experience of the proposing firm, the availability and capability of staff, and the clarity of the proposal among other concerns. Proposing firms should submit materials evidencing these matters.
5. The proposing firm shall disclose any conflicts of interest, which it may encounter in performing under this solicitation no matter how immaterial.
6. The current organizational chart is attached as Exhibit “A” to this solicitation.
7. Proposals should be labeled as “Proposal for Classification and Compensation Study” and should be sent to:

**Ms. Karina Chavez
Administrative Assistant
1039 Chelsea St.
El Paso, Texas 79903**

8. Please submit one electronic copy to chavezkx2@elpsotexas.gov and one original hard copy signed in blue ink and six (6) copies both sent in a single sealed envelope and properly addressed to Mrs. Chavez at the address listed above.
9. Proposals must be received by the close of business on February 5, 2021. Proposals received after this date or time will not be considered. Proposals will not be finally awarded until the Board of Trustees approves the resulting contract or agreement.
10. This solicitation was posted on the Trust’s web site and mailed to the following firms who represent a non-exhaustive list of potential respondents: Public Sector Personnel Consultants, CBIZ, Longnecker & Associates and Arthur J. Gallagher & Co.
11. Proposals submitted will be evaluated based upon the factors identified in Section “D” of this solicitation. The percentage break down for these factors are as follows:
 - a. **Fixed Cost Price** **50 Percent**
 - b. **Qualifications and Experience with public sector defined benefit retirement plans preferred** **50 Percent**

EVALUATION PROCESS:

The Board of Trustees has established a sub-committee of the Board who has been delegated the responsibility to review and make a recommendation regarding this solicitation. This sub-committee shall evaluate the proposals based upon the evaluation factors identified in this solicitation. The Trust reserves the right to waive any minor irregularities or technicalities in the proposals received. Proposals shall be evaluated on an individual basis against the requirements of the RFP.

The Board reserves the right during the evaluation process to request additional information or clarifications from proposers or to allow corrections of errors or omissions.

The Board or sub-committee of the Board may request, but are not obligated to, interview either in person, via electronic meeting format, or by phone any respondents regarding their proposal. This may be for clarification or discussion of the proposal.

The Trust reserves the right to reject any or all proposals if such action is in the best interest of the Trust. Any proposals that are considered non-responsive shall not be considered. The Trust may at any time during the evaluation process reconsider any proposal submitted. The Trust also reserves the right to delete, add or modify any aspect of this solicitation up until the final contract is signed.

The selected proposal shall be incorporated by reference in the final contract. Any false or misleading statements found in the proposal shall be grounds for disqualification or contract termination.

All proposals become the property of the City of El Paso Employees Retirement Trust upon receipt and shall not be returned. The proposals are deemed to be public records subject to disclosure by the Texas Public Information Act. If an open records request is made, the proposal shall be disclosed unless information is deemed to be confidential or exempted from disclosure under the Public Information Act. It is the proposer's responsibility to identify any information that may be exempt from disclosure under the Act and inform the Trust of such assertions in a timely manner or the information shall be disclosed pursuant to State law.

This RFP is not a contract and creates no legal rights for individuals or entities submitting proposals.

Exhibit "A"

Board of Trustees

Robert Ash
Executive Director

Adrian Sanchez
Deputy Executive Director

Karina Chavez
Administrative Assistant

Alma R. Duenas
Benefits/Budget Specialist

David Garcia
Payroll/Accounts Payable Specialist

Esmeralda Aguirre
Benefits Technician

Pauline Castillo
Benefits Technician

Emilia Avila
Retiree Coordinator/Data Entry Clerk