



# Section I

## Introduction

### 1.1 Background

As a private, tax-exempt university enriched by its United Methodist heritage and partnership with the Dallas-Fort Worth area, SMU seeks to enhance the intellectual, cultural, technological, ethical, and social development of a diverse student body. SMU offers undergraduate programs centered on the liberal arts and excellent graduate, professional, and continuing education programs. The SMU experience also includes accessible faculty in small classes and abundant opportunities for research experience, international study, leadership development, and service and internship opportunities beyond campus – all with the goal of preparing students to become contributing citizens and leaders for our state, nation and world.

these individuals or groups, incorporating their input into the process, are expected. Presentation to the Human Resource Department upon completion of the project is also expected.

The study shall evaluate the present salary structure as compared to the specific job market for comparable positions in comparable universities or within the public/private

data, pictures or other representations of SMU without prior written consent of Southern Methodist University.

#### 1.7 Insurance Provisions and Indemnification

The selected contractor must have in full force and effect during the term of any agreement the types and amounts of insurance defined in Exhibit II of this documentation. Further, any awarded party shall require all subcontractors, if sub-contractors are permitted, to carry identical insurance coverage, limits of liability and provisions. The selected party shall submit Certificates of Insurance in duplicate to SMU within one week after receipt of the notice of award. SMU reserves the right to change insurance requirements at any point during this RFP.

#### 1.8 Anti-Lobbying Provision

Contractors, including their agents and representatives and sub-consultants, shall not undertake any activities or actions to promote or advertise their proposal to any member of the Board of Trustees of SMU, or SMU staff or faculty except in the course of SMU-sponsored inquiries, briefings, interviews or presentations.

## Section II Description of Services

### 2.0 GENERAL TERMS

The consultant shall perform or provide the following.

#### 2.1 Scope of Services

Using current job descriptions, determine the market value for selected staff positions based on comparable universities and/or other employers within the same geographic area and/or region.

Determine relative worth of staff positions within the organization for internal equity and to ensure positions are in the appropriate pay range.

Identify potential pay compression issues and provide potential solutions.

Update/revise job families, job descriptions, and job titles to facilitate a consistent understanding of work, levels of contribution, performance expectations and the potential for growth and development.

Review the current salary structure and prepare recommendations for compensation rules and policies, to maintain competitiveness, ensure equity, and position the university as an employer of choice.

#### 2.2 Information Meetings

Consultant to schedule an initial meeting with the Chief Human Resource Officer, Senior Compensation Specialist, & HR Business Partners, to discuss the process and tasks to be performed in the study to include reasonable dedication of key personnel.

Consultant to provide frequent updates to Senior Compensation Specialist.

#### 2.3 Classification Study

Consultant to review current classification grade methodology, and propose recommended strategies for the University.

Consultant to identify Officials & Administrators, Professionals, Technicians, Paraprofessionals, Administrative Support, Skilled Craft Workers, and Service employees, including fair Labor Standards Act (FLSA) status (exempt/non-exempt).

Consultant to finalize class specifications and recommend appropriate classification for each employee, including correction of identified discrepancies between existing and proposed classifications.

Consultant to identify career ladders/promotional opportunities as deemed appropriate.

Consultant to submit recommendations for appropriate implementation measures that the Human Resources staff will need to take.

Consultant to present proposed recommendations to the Senior Compensation Specialist for review prior to making any final classification determinations.

Consultant will provide a straightforward, easily understood, maintenance system that Human Resources Department will use to keep the classification system current and equitable. The classification system should be provided in an electronic medium.

M remrb9q6.1 (t)-68t(em)-5any7amaintenancytioivities0.5 (,)-6a6 (ons)-2 ( )1.2 ( w)1e.8 ( 3)-2.1 (l) (er

12. Consultant will conduct a compression analysis to include any recommendations for implementation.
13. Consultant will conduct a comprehensive training program for Human Resources staff to ensure that the staff can explain and administer the new system in the future. The training program should be clearly spelled out in the proposal.

## 2.5 SMU Resources

SMU will provide copies of all pay ranges, job classifications, and any other available in-house information requested by the selected consultant that may be required to complete the study.

## 2.48 INVOICING

The selected vendor will provide a monthly detailed invoice for all services performed. The monthly invoice shall be delivered to: [invoices@smu.edu](mailto:invoices@smu.edu). It is the vendor's responsibility to include all relevant contact information on each invoice to ensure that it is routed correctly; this is including, but not limited to, department name, departmental contact, and invoice number.

## Section III Proposal Requirements

### 3.0 Proposal Format

The respondent shall submit one original electronic copy of their written proposal that presents their qualifications and understanding of the work to be performed. Include all information requested, organized in tabbed sections clearly identified in a table of contents as described in the paragraphs that follow. Any other information thought to be relevant, but not applicable to the enumerated categories, may be provided as a separate category (i)2.2cahy (m10.e



### 3.6 References

Include the name, address, telephone number, and e-mail address for contact persons at five (5) other higher education entities for which comparable services have recently been rendered.

### 3.7 Cost of Services

Provide a total cost estimate, including travel expenses, and “not to exceed” amount for the work described in scope of work; a rate schedule for computing any extra work not specified in the contracted scope of work; and an amount to be deducted from total cost estimate because Offeror is conducting (or has conducted in the past six (6) months) salary surveys of comparable jurisdictions, the data from which can be shared rather than independently gathered.

### 3.8 Final Product

Provide a statement that the proposer agrees to:

- a. Deliver at least one (1) original, five (5) copies, and an electronic copy of the final report to the Senior Compensation Specialist or designee.
- b. Provide the final report, tables, schedules, job descriptions, charts, spreadsheets, salary surveys, and other materials necessary for the implementation and maintenance of the compensation/classification system in an electronic medium.
- c. Appear at scheduled requested meetings to discuss the recommendations and final report.

### 3.9 Additional Services (Optional)

Provide any other related and recommended products or service not specified in the RFP which may be considered essential or benefitted by the firm. These services should be priced separately from “Section 3.7 Cost of Services” above and shown here.

### 3.10 Other

The complete (all pages) Request for Proposal documents with any addenda acknowledgements filled out, initialed, and signed as required. The person that signed the RFP shall have the authority to negotiate the full scope of services on behalf of the organization and shall be authorized to bind the contract to the terms and conditions of this RFP.

The classification and compensation system to be recommended as responses to this RFP must adhere to the following basic elements and characteristics: (a) the system must meet all legal requirements, (b) be totally nondiscriminatory and provide for compliance with all pertinent federal, state, and local requirements (e.g., ADA, FLSA, EEO, etc).

The system must be easy for management to administer, maintain, and defend.

The system must easily accommodate organizational changes and growth.

The system should be based on sound compensation principles in which internal and external equity are considered within the pay structure, as well as, the concepts of

## Section IV Evaluation Criteria for Award

### 4.1 Evaluation Information

The University will utilize a selection committee for the evaluation of the RFP. Generally the selection teams consist of 3-4 individuals who have a direct interest in the award of this contract. A list of the individuals on the committee will be made available upon request.

The selection team will ensure that the contractor with the best overall value to the University will be selected. Factors that will be considered to determine "the best value" include, but are not limited to, price, services, company and management experience, past service levels, financial condition, perceived reliability and presentation. The selection committee shall be the sole judge of the comparative evaluation of the bids received. The decision of the selection committee will be final. The University reserves the right to reject any and all bids.

The University may choose to interview any, all, or none of the respondents. If interviews are held, selected firms will be notified of the place, time, date, and purpose of the interview.

### 4.2 Evaluation Criteria and Weights

Exhibit II  
SMU's GENERAL TERMS AND CONDITIONS

DFFRUG ZLWK WKH KLJKHVW DSSURSULVDWDHQSD B GHV  
UHOLHV XSRQ 6HOOHU V H[SHUWLHV WRFISURYLGHPRDQGHV DQMG SRUDRBRPVSOLLSRV B O 6RHO  
SURPSWO\ ZLOO F WULQH E W VD QR RGHV HFRUR VWUW RF 6H/8 DW QR

1RQ 'LVFULPLQDWLRQ \$IIGHPDOWHUYZDSFUNDLQRQV WKDW LW ZLOVRQFRQGLKMFIEDP/LQD R M  
UHOLJLRQ QDWLRQDHOGLWDEDO LWHPD W H R Q H W L F W L H Q B Q P V H Q M D X W L R Q H [ R W Q H Q U S [ S U H L G V H Q R V L  
SDUWLHV KHUHE\ LQFRUSRUDWH WKH HDXDDOPHPSLYR\PHFQW RQS S R U W L X U H L P H Q D V Q G D L I D Q S S O  
& ) 5 3DUW \$SSHQGL[6\$HQRH6XEQGUDVO 6HODDIELGDHUELW KH W K D I T X L ) B H P H Q W D R D Q G  
D 7KHVH UHJXODWLRQV SURKLELWOG LLVFGU LSPURQD H V L R Q G D Y B W Q H V M D Q X D Q G T X D Q L I L  
GLVDELOLW\ DQG UHTXLUH DIILUPDWLYHU D F W E R R Q D Q G R Y X I E F R Q S W L D F F W R R Q W R H P S O R \  
TXDOLILHG SURWHFWHG YHWHUDQV DQDELOLWILHWG LQGLYLGXDOV ZLWK GLV

&RPSOLDQFH ZLVKODZV UHSUHVHQWV D V Q L G V Z L L O O D S R P S L Q D Z O W K I H G C H U D O V W D W H  
UHJXODWLRQV DQDQGLKDWV H O J Y U R H R G H X P D Q L X B F W X Z L I Q D E U I X U Q L V K H G L Q B I S F R U D G D Q F W H Z  
ORFDO ODZV DQG UHJXODWLRQV 6HODCHU DZLG S R U E P L D L Q D L O V K B H W X O U P I G W Q D E L W D N F R X  
SURSHUO\ ODEHONG DQG DFFRPSDQLHG E\ D 6DIHW\ 'DWD 6KHHW 6'6

,QGHSHQGHW±&RQW&RQWRUDFW GSDHUVQRHWVFKLSDVDHMDRLQW SYCRQWUX UHP SOR\HH UHO  
WKH SDUWLHV 6HODRIGVSDQGLGHUWLVWVDQK H Q G K S B E G H Q W F R Q W U D F W R U

1R .LFNEDFNV RU ([WUD %HQHILWVH Q D I H U & R C S U L G H V H U D W M D Q S Z O B B D Q W R K D Z V Q H F H L  
DQ\ SHUVRQDO FRPSHQVDWLRQ RU FRQVLSGHODDHWLIRQ FRQDQCH FNLQRQ EZL W/K IRJ W DSHUHQJUP  
WKLW &RQWUDFW 6WQDFRQVUGHVDWMLRQ V R G E H U S W K G V L B R D Q G D I F W V L R Q D E O H B Q V L Y G H V