

OCERS COMPENSATION STUDY

MARCH 2026

REQUEST FOR PROPOSAL – QUESTIONS & ANSWERS



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QUESTION	ANSWER
Q1. Is OCERS looking for any data from published data sources, or exclusively from identified agencies?	OCERS anticipates that the compensation analysis may include data obtained directly from comparable agencies as well as relevant published data sources, as appropriate. Respondents should describe their proposed data sources and methodology in their proposal. OCERS will evaluate the approach based on data quality, reliability, and applicability to the study objectives.
Q2. Does OCERS have a list of established agencies for the survey?	OCERS does not maintain a predetermined list of comparable agencies for this study. While prior compensation studies have utilized a comparator pool that included California retirement systems, the selected consultant will be expected to recommend an appropriate and defensible comparator pool for this engagement, subject to OCERS' review and approval. Respondents should describe their methodology for selecting comparators and the typical size of the comparator group used in similar engagements.
Q3. If OCERS does not have a list, is OCERS seeking a formal process from the consultant to provide	OCERS does not maintain a predetermined list of comparable agencies for this study. While prior compensation studies have utilized a comparator pool that included California retirement systems, the selected consultant will be expected to recommend

recommendations on agencies for the survey?	an appropriate and defensible comparator pool for this engagement, subject to OCERS' review and approval. Respondents should describe their methodology for selecting comparators and the typical size of the comparator group used in similar engagements.
Q4. What is the condition (in terms of accuracy to the work) of the classification specifications for the 37 benchmark job titles?	OCERS maintains current specifications. The selected consultant will review and validate job information in collaboration with OCERS staff.
Q5. Is OCERS comfortable with the study being conducted virtually with no on-site visits?	OCERS will consider proposals from firms utilizing virtual or hybrid operating models. However, respondents should assume that a minimum of three (3) on-site meetings will be required, as stated in the RFP. Respondents may propose alternative approaches, but OCERS reserves the right to determine whether proposed alternatives meet project requirements.
Q6. Does OCERS have a determined budget for the study and can you share that with us?	OCERS has established an internal budget for this engagement; however, the budget will not be disclosed. Proposers are encouraged to submit their most competitive and cost-effective proposal consistent with the Scope of Services and requirements set forth in the RFP. Proposals will be evaluated in accordance with the criteria identified in the RFP, including cost reasonableness and overall value to OCERS.
Q7. Would OCERS like the consultant to include private sector data in the market survey? Please note that private	OCERS does not require the use of private sector data; however, proposers may include private sector data if they believe it is appropriate and relevant to their proposed methodology. The use

<p>sector organizations rarely respond to custom surveys. Therefore, we typically uses reputable published sources to represent private sector data. Would that approach be acceptable to OCERS?</p>	<p>of reputable, published compensation data sources is acceptable. Proposers should clearly describe their data sources, methodology, and rationale in their proposal. OCERS reserves the right to evaluate the appropriateness of the proposed approach as part of the overall proposal evaluation.</p>
<p>Q8. Would OCERS like the consultant to provide recommendations regarding compensation/pay policies?</p>	<p>Yes. Recommendations on pay structures and practices are expected, though all are advisory and subject to OCERS approval.</p>
<p>Q9. Does OCERS want the consultant to calculate the cost of implementation for our recommendations?</p>	<p>Yes, estimated cost impacts for recommendations are anticipated. Assumptions must be clearly stated in developing such estimates. Final implementation decisions, including scope and timing, will be determined by OCERS and are not guaranteed.</p>
<p>Q10. Is OCERS seeking assistance with implementation and/or training following the study?</p>	<p>The RFP includes implementation guidance as part of the scope of services. Proposers may, at their discretion, describe optional implementation support or training services as separate or optional elements. OCERS is not committing to additional services beyond those expressly identified in the RFP.</p>
<p>Q11. Has OCERS established a budget for this project? If so, would OCERS be willing to share that information with bidders?</p>	<p>OCERS has established an internal budget for this engagement; however, the budget will not be disclosed. Proposers are encouraged to submit their most competitive and cost-effective proposal consistent with the Scope of Services and requirements set forth in the RFP. Proposals will be evaluated in accordance with the criteria identified in the RFP, including cost reasonableness and overall value to OCERS.</p>

<p>Q12. The RFP body (Exhibit A, p.11) states the study will cover 37 exempt-level classifications, while the Services Agreement Exhibit A (p.32) states 35 classifications. Please confirm the correct number of classifications to be included in the study.</p>	<p>The study will include 37 exempt level classifications. This response is provided for clarification purposes. Proposers shall rely on the RFP, as currently posted, and base their proposals and pricing on 37 classifications.</p>
<p>Q13. What is the System's budget or maximum contract amount for this engagement?</p>	<p>OCERS has established an internal budget for this engagement; however, the budget will not be disclosed. Proposers are encouraged to submit their most competitive and cost-effective proposal consistent with the Scope of Services and requirements set forth in the RFP. Proposals will be evaluated in accordance with the criteria identified in the RFP, including cost reasonableness and overall value to OCERS.</p>
<p>Q14. What is the expected project start date and completion date or overall duration following contract award?</p>	<p>OCERS anticipates awarding a contract in June 2026, with work commencing following completion of approval of the evaluation process and execution of the agreement. Respondents should propose a project schedule and duration consistent with their proposed methodology and scope of services. Final timelines will be subject to negotiation with the selected firm.</p>
<p>Q15. Are any of the exempt-level classifications covered by collective bargaining agreements? If so, how many separate CBAs apply? Will the selected vendor be required to participate in any meet-and-confer sessions?</p>	<p>No. The exempt-level classifications included in this study are not bargaining unit positions. The consultant will not be required to participate in formal meet-and-confer sessions</p>

<p>Q16. Will the System consider proposals from vendors whose standard operating model is fully virtual? The RFP requires a minimum of three on-site meetings; please clarify whether this requirement may be modified or waived.</p>	<p>OCERS will consider proposals from firms utilizing virtual or hybrid operating models. However, respondents should assume that a minimum of three (3) on-site meetings will be required, as stated in the RFP. Respondents may propose alternative approaches, but OCERS reserves the right to determine whether proposed alternatives meet project requirements.</p>
<p>Q17. Does the System currently target a specific market position (e.g., median, mean, 60th percentile) for compensation purposes? Is the goal of this study to establish, validate, or adjust that market position?</p>	<p>OCERS does not mandate a fixed market position. While prior compensation studies referenced a 75th percentile market position, this information is provided for context only and does not establish a requirement for this engagement. The selected consultant will independently assess market competitiveness and recommend an appropriate market position, subject to OCERS' review and approval.</p>
<p>Q18. Does the System have an existing list of approved comparable agencies for the labor market survey, or will the selected consultant be expected to recommend the comparator pool?</p>	<p>OCERS does not maintain a predetermined list of comparable agencies for this study. While prior compensation studies have utilized a comparator pool that included California retirement systems, the selected consultant will be expected to recommend an appropriate and defensible comparator pool for this engagement, subject to OCERS' review and approval. Respondents should describe their methodology for selecting comparators and the typical size of the comparator group used in similar engagements.</p>
<p>Q19. If the consultant will recommend, approximately how many comparable agencies does the System wish to include?</p>	<p>OCERS does not maintain a predetermined list of comparable agencies for this study. While prior compensation studies have utilized a comparator pool that included California retirement systems, the selected consultant will be expected to recommend</p>

	<p>an appropriate and defensible comparator pool for this engagement, subject to OCERS' review and approval.</p> <p>Respondents should describe their methodology for selecting comparators and the typical size of the comparator group used in similar engagements.</p>
<p>Q20. Will all exempt-level classifications be included as benchmark classifications in the labor market survey, or does the System wish the consultant to recommend a subset of benchmark positions?</p>	<p>Not all classifications are expected to be benchmarked directly. The consultant should recommend a representative set of benchmark classifications sufficient to support reliable market analysis and internal alignment. Final benchmark selections will be subject to OCERS' review and approval.</p>
<p>Q21. Regarding the total compensation analysis, please describe the methodology or level of actuarial detail the System expects for the pension valuation component</p>	<p>OCERS expects a comparative employer-cost valuation suitable for inclusion in a total compensation analysis. A full actuarial valuation is not required. Respondents should describe their proposed methodology, assumptions, and level of detail in their proposals.</p>
<p>Q22. For the per-incumbent impact analysis (Exhibit A, Item 5), approximately how many incumbents are covered under the 37 (or 35) exempt-level classifications?</p>	<p>As listed in Exhibit F (the list of OCERS positions), 69 incumbents are covered under the 37 exempt-level classifications.</p>
<p>Q23. How many pay grades are currently in the System's salary structure?</p>	<p>OCERS maintains a structured salary system consisting of multiple pay grades. The currently approved salary ranges are publicly available and are reflected in the OCERS FY 2026 Budget (see page 32 of the linked document below). Detailed pay grade</p>

	<p>structures, salary ranges, and related data will be provided to the selected consultant during project initiation.</p> <p>https://www.ocers.org/sites/main/files/file-attachments/2026_budget_combined_for_posting_to_website.pdf</p>
<p>Q24. Does the System have a written compensation philosophy or policy document that can be shared with respondents?</p>	<p>Yes. OCERS' current Compensation Policy is publicly available at the URL link below.</p> <p>https://www.ocers.org/sites/main/files/file-attachments/ocers_compensation_policy.pdf?1772665042</p>
<p>Q25. Are development of a wage progression tool, compensation maintenance training, or post-study consulting hours anticipated as part of this engagement?</p>	<p>These services are not included in the current scope unless explicitly proposed as optional services. OCERS may consider optional services at its discretion.</p>
<p>Q26. Exhibit A references conducting employee interviews "as needed." Does the System anticipate employee interviews being required?</p>	<p>A. Employee interviews may be conducted if deemed necessary by OCERS.</p>
<p>Q27. When was the last time the System conducted a comprehensive compensation study?</p>	<p>OCERS last conducted a comprehensive compensation study, which was approved in June 21, 2021. Approval of such study is publicly available at the URL link below Section A6 Relevant background materials will be provided to the selected consultant during project initiation.</p> <p>https://www.ocers.org/sites/main/files/file-attachments/2021-06-21_regular_board_meeting_minutes.pdf</p>