



Request for Proposal #2022-02

Classification & Compensation Study

PREPARED FOR

Wytheville, Virginia

DUE BY

April 12, 2022

Prepared by:

Dan Ripberger
Managing Director, Practice Lead
djipberger@boltonusa.com
(202) 670-5320

1. COVER SHEET & COVER LETTER

The required cover sheet can be found on the following page.



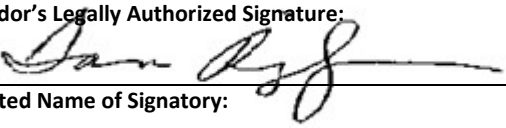
Town of Wytheville, Virginia Request for Proposal Compensation & Classification Study

ISSUE DATE: 03/10/22	DEPARTMENT: Assistant Town Manager	PROCUREMENT #: RFP-2022-02
DATE/TIME LAST DAY FOR QUESTIONS: 04/08/22 on or before noon	DATE/TIME OF PRE-PROPOSAL MEETING OR N/A: No meeting	DATE/TIME OF CLOSING: 04/12/22 on or before 4:00 pm
TOWN CONTACT NAME: Elaine Holeton	CONTACT PHONE: 276-223-3352	CONTACT EMAIL: elaine.holeton@wytheville.org
PHYSICAL ADDRESS DELIVER/DELIVERY SERVICE Town Municipal Building 150 East Monroe Street Wytheville, VA 24382	MAILING ADDRESS VIA USPS: Town of Wytheville P.O. Box 533 Wytheville, VA 24382	HOURS OF OPERATION: 8 am – 5 pm Daily, Monday through Friday, Except local, state, and federal holidays

Process: Sealed proposals subject to the terms and conditions as set forth by the Town of Wytheville shall be received in accordance with the date(s), time(s), and locations as specified above. All responses shall be in accordance with the requirements of this procurement document and the ensuing contract documents. Any alterations or changes will be made by a written addendum issued by the Town and all Offerors are responsible for obtaining issue addenda when notice of such is posted.

Agreement: In accordance with the following proposal and in compliance with the terms and conditions provided, unless otherwise noted, the undersigned offers and agrees, if the proposal is accepted, to furnish items or services as proposed, to be delivered, or furnished to designated points within the time specified, and further agrees to any changes when said changes are mutually agreed by both parties through subsequent negotiations. By signing this proposal, I certify that I am authorized to Bind the Offeror in any and all negotiations and /or contractual matters relating to the proposal. By submitting this proposal, I understand, and I agree to be bound by the conditions set forth in this document and listed attachments.

Note: This public body does not discriminate against faith-based organizations in accordance with the *Code of Virginia*, § 2.2-4343.1 or against a bidder or offeror because of race, religion, color, sex, national origin, age, disability, sexual orientation, gender identity, political affiliation, or veteran status or any other basis prohibited by state law relating to discrimination in employment.

Vendor's Legally Authorized Signature: 	Date: 04/08/2022
Printed Name of Signatory: Dan Ripberger	Title: Managing Director
Name of Business/Firm: Bolton Partners, Inc.	Contact Phone: (202) 670-5320
Federal Employment ID# 52-1231144	Contact Email: DJRipberger@boltonusa.com



Benefits, Actuarial, Investment & Compensation Consulting

April 12, 2022

Elaine Holeton
Town Municipal Building
150 East Monroe Street
Wytheville, VA 24382

Re: RFP-2022-02 – Employee Compensation & Classification Study

Dear Ms. Holeton:

Bolton is pleased to submit our response to Wytheville's Request for Proposal (RFP) for an Employee Compensation & Classification Study.

The objective of our proposed engagement is to review the current job classification and compensation systems, and, if needed, recommend changes and/or enhancements to ensure they meet the Town's needs. We believe we are particularly qualified to help Wytheville meet this objective because we:

- **Know the public sector** – Our over 40 years of experience helping public sector clients with their total compensation program design and administration means that we speak your language, understand your processes, and already have some understanding of your environment and culture.
- **Possess proprietary tools and processes** – Our tools and processes are steeped in trusted principles but employ modern technology, systems, and terminology so that they best align with today's HR and workforce.
- **Care about your success** – We want our clients communities to thrive, so we charge our team with developing a personal knowledge of each and the citizens they serve.
- **Are just the right size and value** – Our expertise and professionalism are on par with or exceed that of our national and international competitors, but we deliver with the attention to your needs and lower overhead that only a specialized firm can provide.
- **Have a proven track record** – We have earned a reputation for high-quality standards and solutions to which our public sector clients and our references will attest.

Kasey Braun
April 11, 2022
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In summary, we believe we are unique qualified to meet and exceed the Town's expectations. Working with the towns and counties in Virginia is extremely important to us and we are committed to helping Wytheville excel.

I believe our proposal demonstrates our understanding of your objectives and provides a scope and approach that will meet your needs. However, we would be happy to refine it further in conjunction with the Wytheville team if needed. I will be the project manager for this engagement, so, please contact me with any questions.

Best regards,

A handwritten signature in blue ink, appearing to read "Dan Ripberger", with a long horizontal flourish extending to the right.

Dan Ripberger
Managing Director, Practice Lead
djripberger@boltonusa.com
(202) 670-5320

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2. PROJECT UNDERSTANDING, METHODOLOGY, AND APPROACH

Background

Wythe County was created in 1789 and named for George Wythe, the "father of American Jurisprudence" and signer of the Declaration of Independence. In May 1790, Chris Simmerman donated 90 acres, along with John Davis's 10 acres, to establish a town and county seat. Robert Adams completed a town survey in November of that year, dividing the area into half-acre lots. The town did not have an official name yet, but was generally known as Wythe Court House.[7]

Two years later, in October 1792, the town was officially named Evansham, for prominent local citizen Jesse Evans. After a disastrous fire in March 1839, the town was renamed Wytheville. At that time, it was home to about 500 residents.[7]

The Town of Wytheville is located in southwest Virginia and is conveniently located at the crossroads of Interstates I-77 and I-81 in the Blue Ridge Mountains of Virginia. The 2020 census population is 8,265 persons residing within the geographic town limits of 14.5 square miles. Since 1924, the Town has operated under a Council-Manager form of government. The Town is governed by five (5) town council members who are elected at large by the citizens of the town.

The Town Manager and his administrative staff, which includes three (3) employees of the Human Resources Department, manage town operations out of the municipal building on 150 East Monroe Street. Satellite offices for Public Works, Fire, Police, Museum, and Recreation departments are housed at separate locations. As of January 2022, the town employed three hundred eighteen (318) employees and estimates that the fully staffed total number of town positions equates to three hundred and fifty (350) employees. Full time employees comprise one hundred ninety (190) of these positions.

Wytheville maintains a full complement of total rewards program to attract, retain and engage the quality employees it needs to meet resident expectation. One of those programs is the classification and compensation system. The current system consists of about 200 different job titles and descriptions. The Town is currently seeking proposals from qualified Consultants to develop and implement a comprehensive, thorough, and objective classification and compensation plan.

Objectives

The objective of our proposed engagement is to review the current job evaluation, classification and compensation systems and, if needed, recommend changes and/or enhancements to ensure they meet the Town's needs for talent recruitment, retention and engagement going forward.

Scope of Services

Following our project work steps, Bolton commits to designing program components or detailing recommendations that if adopted and implemented will achieve the at least the following requested outcomes requested in the RFP:

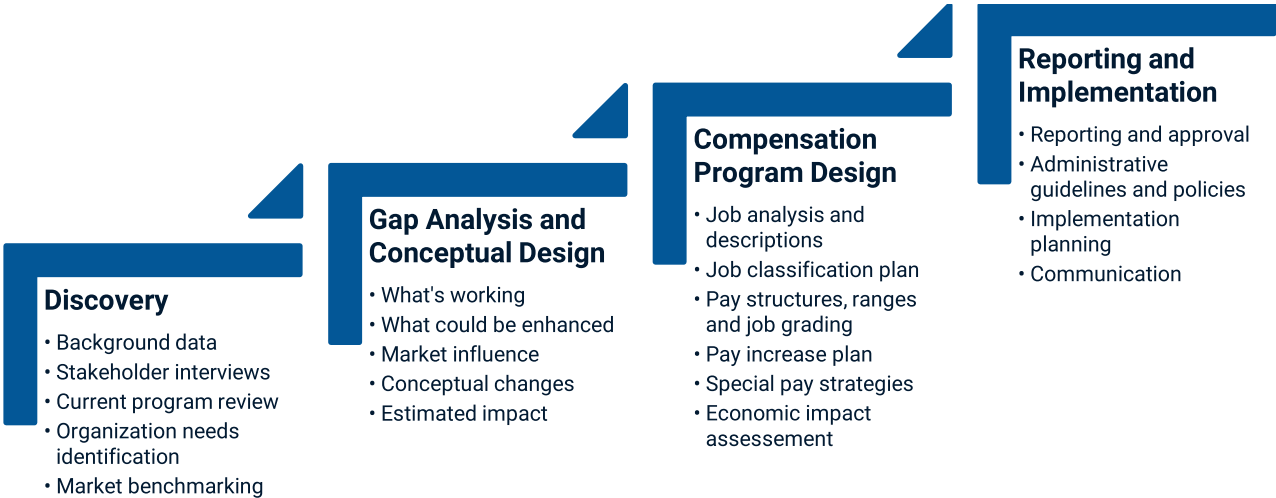
- Collaborate with the Human Resources (HR) Director and Town Manager to fully understand the existing compensation and classification structure.
- Identify existing challenges to the compensation and classification system and related policies and programs.
- Recommend a new system to maintain the compensation and classification system over time.
- Review existing position descriptions and update each job description as needed.
- Conduct a comprehensive pay rate/salary market analysis of all Town positions with comparable and surrounding (regional) jurisdictions and any applicable private/public sector competitors.
- Conduct an analysis of the Town benefits program. Use a market analysis of employment competitors in the area to inform the study's findings and communicate any recommendations to improve the Town benefits package.
- Perform a pay compression analysis to identify any positions "at risk of pay compression" and make recommendations to address at risk positions.
- Share recommendation for a future pay plan type (open range vs. grade and step or hybrid approach) and assist with the development of a compensation program, policy and philosophy for the organization that is equitable, defensible, fiscally sensitive to the organization's budget, easy to communicate, prevents litigation risks and perceived by employees as fair.
- Create a multi-phased implementation plan to improve the compensation and classification system, including a list of top priority position compensation and classification adjustments.
- Assist with the development of a new employee attraction/retention marketing tool to highlight the towns non-direct pay benefits.
- The final written report and an in-person presentation of the findings is expected at the end of the project. Supporting information shall be provided to the Town as attachments to the study report. The report shall become the property of the Town upon completion of the project. The Town shall

reserve all rights to edit and amend the report and supporting information, after the project is complete.

PLEASE NOTE: The Town may amend or delete any content provided in our reports, tools and analyses as these are the Town's property. However, the Town may not attribute such amendments to Bolton, whether verbally, written or by virtue of Bolton logo placement, without our prior written authorization.

Approach and Project Phases

We believe the engagement objective can best be accomplished by working through four distinct phases:



Project Steps

Phase 1: Discovery

Step 1: Project Planning

We will kick off the project with a meeting among the Town's and Bolton's project teams to finalize engagement goals and scope, establish data needs, time milestones, and deliverables. Bolton will prepare data requests and assist with data collection, as needed, and will prepare a working project plan.

Step 2: Current Program Review

Bolton will collect and internally review organizational plan and policy documents, as well as previous assessments and analyses that describe the current compensation and benefits programs and their administration. We will meet with the HR team to ensure our full understanding of the current program.

Step 3: Leadership Discovery

Bolton will work with the Town to brief leadership on the project, its steps, desired outcomes, and timing. We will gather their direction and insight into the Town’s needs and their perceptions of the current program’s effectiveness.

Step 4: Management Interviews

We will interview department heads to better understand how the Town organizes work and jobs, to learn more about special talent considerations and labor market challenges, and to gather perceptions of the current program’s effectiveness.

Step 5: Market Survey/Benchmarking

Bolton will collaborate with the Town to finalize an appropriate competitive labor market that aligns with the feedback received from leadership and management, including specific peer organizations. Using our **TRDx** platform, we will conduct a custom total compensation levels and practices survey of these labor market s and identified peers.

As requested by the Town, we will research *total compensation* elements:

Organization	Pay	Benefits	Retirement
<ul style="list-style-type: none">• Demographics• Staffing• HR Metrics	<ul style="list-style-type: none">• Base Pay• Pay Premiums• Cash Awards• Other Incentives	<ul style="list-style-type: none">• Health• Welfare• Paid Time Off	<ul style="list-style-type: none">• Defined Benefit/ Pension• Defined Contribution

In addition, Bolton maintains an extensive library of published surveys and research that covers a wide array of market sectors, geographies, and job types. We will incorporate this data into our analyses, if needed, to represent the Town’s desired labor markets. The results or our survey and supplemental market research will be summarized and presented as part of our subsequent gap analysis.

Step 6: Phase Briefing

At the end of this phase, we will update our working project plan and meet with the Town to debrief on phase outcomes and project progress. We will also incorporate new project direction from the Town if needed to confirm remaining project phases and steps.

Phase 2: Gap Analysis and Conceptual Design

Step 7: Gap Analysis

After our analysis of background data supplied by the Town, the strategy discussions with senior leadership, and interviews with department heads, Bolton will assess if/where gaps may exist between the Town's objectives and the design and/or administration of its compensation system. Bolton will also assess the alignment of the Town's compensation to the market to identify any gaps.

Step 8: Conceptual Design

Bolton will develop a series of conceptual recommendations to discuss with the Town team and develop an overarching approach to subsequent work steps and well as the program design backdrop.

Step 9: Conceptual Program Recommendations

Bolton will prepare a report that documents our methodology, discovery findings, and conceptual changes and present to the Town team and leadership, if needed. We will then finalize our recommendations based on feedback and further direction from the Town and prepare a final conceptual recommendations report.

Step 10: Phase Briefing

At the end of this phase, we will update our working project plan and meet with the Town team to debrief on phase outcomes and project progress. We will also incorporate new project direction from the Town, if needed, to confirm remaining project phase and steps.

Phase 3: Program Design

Step 11: Job Analysis and Documentation

Review job design, job titling, and job documentation; develop a detailed understanding of the Town's jobs, their requirements, and how they fit together to form the organization. We plan to rely on existing sources of job content data supplemented by our position information form and individual and group interviews (desk audits) to gather the needed information of duties, responsibilities, and other work-related factors.

We plan to work with managers to revise job descriptions should our review indicate it is necessary. Our proposal includes a two-hour online training session with managers about how to write effective and accurate job descriptions and then working with them to prepare an improved draft.

Step 12: Job Evaluation/Classification System

Bolton will conduct a comprehensive evaluation of the Town's current job classification structure, related policies, and practices. We plan to conduct an audit of all positions, which will include desk audits, to verify and validate actual job content if needed. We will evaluate the Town's job classifications/titles and provide recommendations to classify/reclassify positions as appropriate.

Step 13: Structure and Grading System Review

Bolton will employ the market data to develop base pay structures and ranges which are market competitive and aligned with the Town's compensation philosophy and objectives. We will integrate the job evaluation results with the market data to develop and implement a job grading system that aligns internal equity with market competitiveness.

Our recommendations will include guidelines for future structure adjustments and how the adjustments impact employee pay; these guidelines will allow the Town to maintain its structures in a competitive position relative to the market.

Step 14: Employee Pay Equity and Delivery Analysis

Once the revised structure(s) is/are in place and jobs have been classified and assigned to grades, Bolton will assess the competitiveness and equity of actual employee pay. We will use compa-ratios, range penetration or other market alignment measures to assess the Town's overall competitive alignment as well as by roles, career stream, department, and individually.

Working with the Town, we will also address where in a pay range an employee should be paid relative to their performance-over-time in their specific job so that we can assess actual pay competitiveness. In addition, we will analyze broader statistical trends or issues, such as pay compression.

Step 15: Total Pay Delivery System

Total pay plan design/policy recommendations that align how employee pay gets changed over time with what the organization values. Typical adjustments include annual increases or promotional increases and we will expand our recommendations to include:

- New hire rates and salary offer guidelines;
- Promotions (percentages and timing of pay changes);
- Demotions and voluntary reassignments; and
- Other special policies.

In addition, if identified as part of the approved conceptual design, we will develop special pay programs – either ongoing premiums or special awards – that help the Town recognize and reward special behaviors and circumstances.

Phase 4: Reporting and Implementation

Step 16: Approval and Reporting

We will prepare a comprehensive draft report of our methodology, review findings, and recommendations for discussion with Town administration and Human Resources. Based on discussions with the Town, we will incorporate agreed-upon changes and prepare a final report. Should it be desired by the Town, Bolton will present the study report to the Council and management.

Step 17: Policy Updates and Implementation

Bolton will finalize policies and help develop an implementation plan for the new program, develop guidelines for maintaining and updating the new/modified compensation plan, and orient HR staff to the ongoing administration.

Major tasks we expect to complete include:

- Reviewing, editing, and finalizing policies;
- Developing an implementation/communication plan for Town use;
- Working with HR to orient managers to the new systems; and
- Transfer tools and resources to HR and train on their ongoing use.

3. COMPLETION TIMING AND FEES

Expected Completion Timing

We are prepared to initiate this assignment immediately after receiving authorization to proceed. We estimate it will take 16 to 18 weeks to meet the proposal objectives and complete all tasks. This assumes that the Town will provide us with the requested background materials in a timely manner, schedule meetings reasonably and make approval decisions within the timing of the engagement.

Project Phases and Milestones

As requested, the timing broken out by phase is as follows:

Project Phase	Weeks Completed
Discovery	Weeks 1-7
Gap Analysis and Conceptual Design	Weeks 6-9
Compensation Program Design	Weeks 8-16
Reporting and Implementation	Weeks 15-19

Fees and Billing

We will charge an all-inclusive flat fee of \$45,700 to complete all objectives outlined in this proposal. This fee includes all labor, materials, travel-related expenses, and all related costs based on the defined project scope. We bill monthly as work tasks are completed.

Major pricing assumptions:

- Two Town Council meetings and four meetings with Town Administration and other leadership.
- One consulting day for discovery with department management.
- Content (PDQs and/or job descriptions) reviewed and analyzed for all Town jobs. If needed, cost to draft original job descriptions will be \$150 per job.
- 5 group or individual desk audits conducted in person or on-line scheduled by the Town. Audits in excess of 10 will be \$125 per audit.
- Market survey will cover pay, pay practices and benefits using Bolton's TRDx for as many Town jobs as possible reported by up to 20 survey invitees.

4. PLANNED PROJECT TEAM

Our integrated team approach to meeting client objectives allows our consultants to work closely with clients to utilize the best resources and to deliver timely results. The Bolton team is being led by consulting industry veterans and compensation experts. Our team expects to employ electronic means and in-person meetings to work with the Town throughout the course of the study.

Dan Ripberger

Project Manager

Dan Ripberger will serve as Lead Consultant and Project Manager. With 30 years of experience, he has a long history of maintaining successful client relationships and providing sound and effective compensation advice. Along with his expertise in job architecture, classification and compensation, Dan is particularly adept in:

- Change management counsel and direction – Dan is an astute advisor regarding the change management implications of organization-wide compensation projects and helps clients predict and prepare for the financial and employee relations effects of process decisions and plan change decisions.
- Integrating total rewards – an early contributor to the concept of total rewards, Dan helps clients rationalize the value of their total compensation programs (health benefits, paid time off, retirement, etc.) to help guide the design of pay programs and communicate the value proposition to employees and managers.
- Securing the support of elected and employee leadership – by demonstrating an understanding of the viewpoints of various stakeholders, Dan effectively communicates the purpose of plan changes and the benefit of changes to the organization. A video of his recent experience with a Town council presentation can be found at: <https://www.youtube.com/watch?v=JLZ1310H16k>

Over his career, Dan has advised clients of most types and sizes and has developed specialized knowledge of the mission-focused and public sector markets. A sample of his public sector client assignments include Baltimore County MD, Maryland Department of Legislative Services, State of North Carolina, Takoma Park MD, University of North Carolina, US DoD Research and Engineering Labs and Wicomico County MD. In addition, Dan has worked with such quasi-public sector organizations as DC Water & Sewer Authority, Municipal Securities Rulemaking Board, National Quality Forum, and Regional Income Tax Agency.

Dan began his consulting career with Towers Perrin in Washington D.C. He then worked with clients nationally with Aon and helped build their newly acquired Washington, D.C. area office. He went on to help found PRM Consulting in Washington, D.C. and managed the consulting practices for MPI Consulting, a boutique consulting firm in the Midwest. Dan joined Bolton as a result of their acquisition of RSC Advisory

Group, a niche compensation and total rewards consulting he helped found in Washington, D.C. and the Midwest.

He earned a bachelor's degree with concentrations in Economics and Human Resources from Xavier University and has completed significant post-graduate work in labor economics, econometrics and statistical research at Old Dominion University and Virginia Commonwealth University. He maintains professional certifications from both WorldatWork and the Society for Human Resource Management.

Scott Schreiber

Task Lead

In addition to serving as a key project team member, **Scott Schreiber** will lead job documentation and classification project tasks. With 30 years of experience, he has a long history of maintaining successful client relationships and providing sound and effective compensation advice. Along with his expertise in job architecture, classification and compensation, Scott specializes in:

- Job Evaluation systems across a wide variety of organizations.
- Developing alternative approaches to Classification Systems, Point Factor plans, Scored Questionnaires, as well as Market-Based Job Evaluation.
- Tailoring Bolton's point factor job evaluation system to each client's needs.

A sample of Scott's public sector client assignments include: Cincinnati METRO, City of Indianapolis, Green Township OH, Kenton Town Airport Board, Marion Town IN, Northern Kentucky Health Department, Takoma Park MD, Wor Wic Community College.

Previously, Scott served as the Midwest Compensation Practice Leader for Watson Wyatt. Prior to that, Scott was a Principal and Practice Leader for William M. Mercer's Inc.'s Reward and Talent Management practice, President of a small industrial manufacturer, Senior Vice President Human Resources of a large insurance company, and several other corporate and consulting roles.

Scott earned an MBA from Xavier University and a Bachelor of Arts from the University of Cincinnati.

Kandi Metz

Task Lead

Kandi Metz is a Senior Consultant and Bolton's Health & Benefits Practice Leader. Her expertise is in assisting employers maximize the value of their health and welfare benefit programs by developing and implementing innovative solutions and strategic initiatives that balance the client's financial, human resource, and organizational objectives.

Kandi began her career in 1995 as a pension actuary, providing her with unique financial insight when developing client strategy and related solutions, including vendor negotiations and program implementation. She has worked for several of the largest national and international employee benefits consulting firms and was most recently the Vice President of Employee Benefits at Trion, managing a team of eight consultants. Kandi's ability to nurture client relationships, coupled with her complete understanding of the healthcare delivery system, financial forecasting, and risk management, provides her clients with a truly unique skillset and perspective. Her clients view her as a trusted advisor and an extension of their benefits and finance teams.

Kandi received her Bachelor of Science in Actuarial Science from The Pennsylvania State University. She is licensed in Health and Life. Kandi also holds the following designations and memberships: Certified Employee Benefit Specialists (CEBS), Chartered Life Underwriter (CLU), Registered Health Underwriter (RHU), and Registered Employee Benefit Consultant (REBC).

Tom Vicente

Task Lead

Tom Vicente is a senior consulting actuary with Bolton. Tom has over 30 years of experience in actuarial, retiree medical and pension consulting services, as well as the administration and communication of retirement programs. He also has significant experience with design, benchmarking, and retirement adequacy studies for retirement programs, determining cost factors for union negotiated programs, as well as with hybrid pension plans such as Cash Balance and Retirement Equity programs.

Tom has provided retirement consulting and actuarial services to clients across several sectors including commercial, governmental, Not-for-profit and multi-employer programs. Recent clients include the Cecil County Maryland, Philadelphia Gas Works, Montgomery County Maryland, Washington County Maryland and the State of New York.

Tom's focus is on providing high value to clients through innovative solutions, strong communication, and high quality, timely results. He has been a speaker for different groups including the Georgia GFOA, the Society of Actuaries and the American Academy of Actuaries. Tom has published White Papers on Service Purchase Considerations in Public Sector Pension plans and on the impact of accounting rules effecting governmental employers offering post-employment benefit programs and ways in which those employers could mitigate those costs.

Tom received his B. S. in Mathematics from Drexel University. He is a Fellow in the Society of Actuaries and a Member of the American Academy of Actuaries. He has been certified by the Joint Board for the Enrollment of Actuaries to perform actuarial services under ERISA.

Jennifer Durham

Project Team

Jennifer Durham will serve as a Consultant and Task Lead for the market survey portion of our engagement. She is a seasoned professional with over 15 years of collective total rewards and human resources management experience.

Her most recent experience includes market pricing and analysis, job classification, job evaluation, custom surveys, and structure development. Jennifer is the lead administrator for Bolton's market surveys, such as our Maryland Counties Compensation Survey, as well as client-specific surveys.

Prior to joining Bolton, Jennifer was a senior analyst with RSC Advisory Group with a focus on market pricing and analysis, custom survey administration and executive compensation. Prior to consulting, she served as Director, Human Resources for Sekisui XenoTech.

She has a Bachelor's degree in both Accounting and Marketing from Kansas State University, and holds senior professional certification through HRCI (SPHR).

Carmen Velasco

Project Team

Carmen will serve as a Senior Analyst and project team member. Carmen specializes in job analysis, compensation analysis, and managing HR systems and data.

She is a seasoned professional with fifteen years of experience in consulting and corporate compensation positions and is an expert on the topics of job analysis; job evaluation; market pricing; market data analysis; salary survey participation; job reclassification; and job description writing.

Prior to her work with public sector clients at Bolton, Carmen held roles at such organizations as BAE Systems, USF&G, and Anchor Bank. She earned her Bachelor's degree in I/O Psychology from Queens College in Flushing, New York.

5. ADDITIONAL FIRM EXPERIENCE

Bolton is a full-service compensation, employee benefits, actuarial, and investment consulting firm with 40 years of experience providing consulting services to clients in the public and corporate sectors, nonprofit organizations, as well as for the Federal Government. We are headquartered in Baltimore and maintain offices in Atlanta, Cincinnati, Denver, Trenton NJ, Philadelphia, and Washington DC. Bolton maintains a compliment of over 100 staff. Our list of over 300 public sector clients and references for this project are provided in the **Appendix**.

Bolton serves a national client base and has earned a reputation for integrity and the highest quality of work. We build long-term partnerships with our clients by delivering understandable, insightful, and impactful solutions to complex benefits issues so that they can best manage future financial risks and provide valuable benefits to their employees. We have provided consulting services to municipalities and Town and state government agencies in the mid-Atlantic region since our founding in 1981. Our services include classification and compensation studies, actuarial valuations, GASB reporting, experience studies, benefit calculations, and OPEB actuarial services.

Bolton Rewards

Bolton Rewards is the full-service compensation consulting and services practice of Bolton. Our team of experts have provided compensation consulting services for over 30 years in the areas of:

- Total Reward Strategy
- Organization Performance and Design
- Classification and Base Pay Programs
- Performance Management and Incentive Compensation
- Surveys and Research

Each client's needs differ. Staff levels, competency, conflicting priorities and limited resources all affect how our clients use our services. To us, collaboration means fully understanding what our clients need and marrying our services to ensure value-added success. We regularly work with clients on multiple levels:

- Strategy definition and expert advice
- Benchmarking and best-practices analysis
- Program design

- Survey design and administration
- Implementation and communication
- Co-Sourcing

CompManager Platform

Our engagement with the Town and ongoing support will be data-intensive and will require secure handling of data that integrates across multiple sources, include the Town's HRIS. Our CompManager platform allows for this secure data management and allows us to develop, house, and manage almost all our professional content and deliverables in one system. It has developed organically over the years due to the cohesiveness of compensation program components and the fact that their design, analysis, and costing are best managed through a relational framework. Our system is not commercially available for purchase – it is a modular tool that we tailor while working with clients during program review and redesign engagements. This tool also serves as an important component when turning the management over to the client so that they can continue to administer the new program and serves as a cost-effective and time-efficient means for the client to work with us in the future.

CareerStream Job Classification Framework

Bolton is vastly experienced in various job evaluation methodologies such as whole job, ranking, paired comparison, point factor, and others. We synthesized our experience with these approaches in the public sector and designed our CareerStream job classification framework to meet traditional internal and external equity objectives while also allowing organizations to create career paths more easily, better align with the market.

CareerStream is Bolton's proprietary job evaluation and classification system built on a role-and-stream matrix to determine job worth, classify jobs, and establish pay opportunity. We describe a classification as a specified stream level within a particular role that has been analyzed, evaluated, benchmarked, and assigned to a pay structure and grade/level. Career stream levels are defined for each role in compensable factor terms – either as a whole job or by our point factor system.

While we use rank levels for public safety roles, such as fire and police, we maintain level streams for five distinct career groups.

- Administrative and Executive Management
- Operations Management
- Administrative and Program Professionals
- Operations, Technicians and Laborers
- Administrative and Program Support

Bolton Total Rewards Data Exchange – TRDx

Bolton’s Total Reward Data Exchange or TRDx is a cloud-based reciprocal exchange of total rewards and human resource data among invited organizations. The interface and tools allow for efficient participation while the back-end systems ensure user and survey data security. The administration and reporting procedures ensure data confidentiality and compliance with FTC and DOL anti-collusion regulations.

The job content for our TRDx comes from our CareerStream roles and streams. It currently contains over 70 City-specific roles that get combined with our CareerStream levels to survey almost 1,000 different jobs.

The TRDx is a modular system that can research different organizational and total rewards data types:

Organization	Pay	Benefits	Retirement
<ul style="list-style-type: none">• Demographics• Service Delivery• Staffing• HR Metrics	<ul style="list-style-type: none">• Base Pay• Pay Premiums• Cash Awards• Other Incentives	<ul style="list-style-type: none">• Health• Welfare• Paid Time Off	<ul style="list-style-type: none">• Defined Benefit/ Pension• Defined Contribution

6. REFERENCES

Client	Project
Baltimore County, Maryland Kevin Reed Deputy Director 400 Washington Avenue Towson, Maryland 21202 (410) 887-1530 kdreed@baltimorecountymd.gov	Researched, analyzed and advised on total compensation of compensation and practices of eight collective bargaining units across 7 counties and the State of Maryland.
City of Takoma Park, Maryland Tracy Smith Human Resources Director (301) 891-7201 tracys@takomaparkmd.gov	Conducted original market research of selected counties and municipalities and reviewed the market alignment of classifications, pay ranges and actual employee pay.
State of North Carolina Nancy Astrike Human Resources Director (919) 807-4814 nancy.astrike@nc.gov	Conducted an extensive leadership total compensation survey and market assessment of the State's LME/Managed Care organizations. Analyzed findings and prepared and presented recommendations to the state legislature.
Wicomico County, Maryland Jaci Curry Director of Human Resources 125 North Division Street Salisbury, MD 21801 (410) 334-3105 jcurry@wicomicocounty.org	Reviewed and redesign the County's job description, job evaluation, and classification plans. Conducted original market research of selected counties and municipalities and established new pay ranges, classification grading and effective pay management policies.

Client	Project
<p>Wor-Wic Community College Karen Berkheimer Executive Director of Human Resources 32000 Campus Drive Salisbury, Maryland 21804 (410) 334-2915 kberkheimer@worwic.edu</p>	<p>Conducted original market research of selected community colleges counties, and municipalities and reviewed the market alignment of classifications, pay ranges and actual employee pay.</p>

7. REQUIRED FORMS

Attachment A: Addendum Status

Attachment B: Proprietary/Confidential Information

Attachment C: State Corporation Commission (SCC) Form

Attachment D: Non-Collusion Affidavit

Attachment E: Insurance Requirements

Attachment F: Notice of Exceptions

Attachment G: Business License & Professional License

Attachment H: Self Certify Status

Attachment I: Reference List

ATTACHMENT A.

ADDENDUM STATUS

The Town of Wytheville is committed to providing the information necessary for offeror(s) to fully understand the scope of work and to submit complete proposals. If a written question is sent to the project manager by the date listed on the cover sheet, any responses to the questions will be in writing and shared as an addendum to the proposal. The addendum will be posted on the Town's website, <https://www.wytheville.org/rfp> and on any online platforms that featured the original proposal.

This form is used to ensure that all offeror(s) received addendums (if any) for the proposal.

If no addendum was issued or received indicate N/A here: N/A

If addendum(s) were issued, indicate that it was received by offeror below:

The undersigned offeror received the addendum(s),

Signature:



Date(s) of Addendum(s): N/A

Title: Managing Director

Name of Firm: Bolton Partners, Inc.

*** THIS FORM MUST BE INCLUDED IN THE PROPOSAL PACKET

ATTACHMENT B. PROPRIETARY/CONFIDENTIAL INFORMATION

Code of Virginia 2.2-4342F "Trade secrets or proprietary information submitted by a bidder, offeror, or contractor in connection with a procurement transaction or prequalification application submitted pursuant to subsection B of § 2.2-4317 shall not be subject to the Virginia Freedom of Information Act (§ 2.2-3700 et seq.); however, the bidder, offeror, or contractor shall (i) invoke the protections of this section prior to or upon submission of the data or other materials, (ii) identify the data or other materials to be protected, and (iii) state the reasons why protection is necessary. A bidder, offeror, or contractor shall not designate as trade secrets or proprietary information (a) an entire bid, proposal, or prequalification application; (b) any portion of a bid, proposal, or prequalification application that does not contain trade secrets or proprietary information; or (c) line-item prices or total bid, proposal, or prequalification application prices."

Trade secrets or proprietary information shall be identified in writing on this form, either before or at the time the data or other material is submitted. **Note: If proprietary/confidential information is identified, Bidder/Offeror must submit a redacted copy (in both paper and electronic PDF format) of their bid/proposal in addition to the required number of copies requested.** The proprietary or trade secret material must be clearly identified in the redacted bid/proposal copy by a distinct method such as highlighting or underlining and must indicate only the specific words, figures, or paragraphs that constitute a trade secret or proprietary information. The designation of an entire proposal document, line-item prices, and/or total proposal prices as proprietary or trade secrets is not acceptable. If, after being given reasonable time, the offeror refuses to withdraw such a classification designation, the proposal will be rejected.

Name of Bidder/Offeror: Bolton Partners, Inc.

Indicate N/A if there is no proprietary/confidential information in the proposal N/A

If there is proprietary/confidential information, complete the table below. Additional sheets can be added if needed.

SECTION/TITLE OF THE CONFIDENTIAL INFORMATION	PAGE NUMBER(S)	REASON(S) FOR WITHHOLDING FROM DISCLOSURE

*** THIS FORM MUST BE INCLUDED IN THE PROPOSAL PACKET

ATTACHMENT C. STATE CORPORATION COMMISSION (SCC) FORM

Pursuant to Code of Virginia 2.2-4311.2 (B) A bidder/offeror organized or authorized to transact business in the Commonwealth pursuant to Title 13.1 or Title 50 is required to include in its bid/proposal the identification number issued to it by the State Corporation Commission (SCC) and shall not allow the identification number to lapse, be revoked or cancelled at any time during the term of the contract. Any bidder/offeror that is not required to be authorized to transact business in the Commonwealth as a foreign business entity under Title 13.1 or Title 50 or as otherwise required by law is required to include in its bid/proposal a statement describing why the bidder/offeror is not required to be so authorized. Any bidder or offeror described in subsection B that fails to provide the required information shall not receive an award unless a waiver of this requirement and the administrative policies and procedures established to implement this section is granted by the Director of the Department of General Services or his the designee or by the Chief Executive of a local governing body. A link to the SCC site is at <http://www.scc.virginia.gov>.

Select one (1) of the choices with an X.

The undersigned Offeror is:

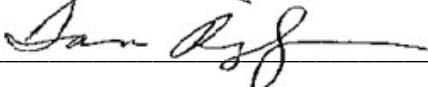
 X a corporation or other business entity with the following SCC identification number: F1634122

 not a corporation, limited liability company, limited partnership, registered limited liability partnership, or business trust.

 out-of-state business entity that does not regularly and continuously maintain as part of its ordinary and customary business any employees, agents, offices, facilities, or inventories in Virginia (not counting any employees or agents in Virginia who merely solicit orders that require acceptance outside Virginia before they become contracts, and not counting any incidental presence of the Offeror in Virginia that is needed in order to assemble, maintain, and repair goods in accordance with the contracts by which such goods were sold and shipped into Virginia from bidder's out-of-state location).

 out-of-state business entity that is including with this bid an opinion of legal counsel which accurately and completely discloses the undersigned Offeror's current contacts with Virginia and describes why those contacts do not constitute the transaction of business in Virginia within the meaning of § 13.1-757 or other similar provisions in Titles 13.1 or 50 of the Code of Virginia. **Attach opinion of legal counsel to this form.**

 an entity which has not completed any of the foregoing options but currently has pending before the SCC an application for authority to transact business in the Commonwealth of Virginia and wishes to be considered for a waiver to allow them to submit the SCC identification number after the due date for bids/proposals. The Town reserves the right to determine in its sole discretion whether to allow such waiver.

Signature:  **Date:** 04/08/2022

Name: Dan Ripberger **Title:** Managing Director
(Print)

Name of Firm on SCC License:

Bolton Partners, Inc.; F1634122

*** THIS FORM MUST BE INCLUDED IN THE PROPOSAL PACKET

ATTACHMENT D.

NON-COLLUSION AFFIDAVIT

The Town of Wytheville is committed to an equitable and fair procurement process. Procurement policy prevents collusion as it relates to the development of procurement documents.

I hereby certify that I am the offeror or a partner of the offeror, or an officer or employee of the offeror's corporation with authority to sign on its behalf and I certify that the following statements are true.

- (1) That the attached proposal or proposals have been arrived at by the offeror and have been arrived at and submitted without collusion or any design to limit bidding or competition; and
- (2) That the contents of the proposal or proposals have not been communicated to any person not an employee or agent of the offeror on any bid furnished with the proposal or proposals, and will not be communicated to any such person prior to the official opening of the proposal or proposals; and
- (3) That I have fully informed myself regarding the accuracy of the statements made in this statement.

Signature:  Date: 04/08/2022

Name: Dan Ripberger Title: Managing Director
(Print)

Name of Firm: Bolton Partners, Inc.

*** THIS FORM MUST BE INCLUDED IN THE PROPOSAL PACKET

ATTACHMENT E.

INSURANCE REQUIREMENTS

By signing and submitting a bid or proposal the vendor certifies that if awarded the contract, they will have the following insurance coverages at the time the contract is awarded. If any subcontractors are involved, the subcontractor will have the same insurance. The contractor further certifies that they or any subcontractor will maintain these coverages during the entire term of the contract.

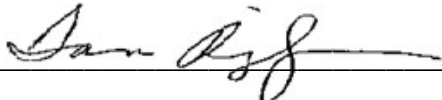
- a. **Workers' Compensation** - Statutory requirements and benefits. Coverage is compulsory for employers of three or more employees, to include the employer. Contractors who fail to notify the Town of increases in the number of employees that change their workers' compensation requirements under the Code of Virginia during the contract shall be in noncompliance with the contract. § 2.2-4332 and 65.2-800 et seq. Code of Virginia
- b. **Employer's Liability** - \$1,000,000 bodily injury by accident/\$1,000,000 bodily injury by disease policy limit/\$1,000,000 bodily injury by disease each employee.
- c. **Automobile Liability Insurance** with limits of \$1,000,000. Coverage symbol 1, Best Rating of A-.
- d. **Commercial General Liability** - \$1,000,000 combined single limits. Commercial General Liability is to include bodily injury and property damage, personal injury and advertising injury, products and completed operations coverage. The "Town of Wytheville, Virginia, its Officers, agents, and employees" shall be added as additional insured on a primary basis and so endorsed on the policy. Such additional insured status shall be primary without participation by County's insurers.
- e. **Professional Liability** – limit of \$1,000,000.
- f. **Builders Risk Coverage**. Replacement cost basis for the duration of the contract.

Upon Request, the Town may require two (2) documents of insurance coverage:

- 1.) Certificate of Insurance (COI) for the Town of Wytheville. COI must show the Additional Insured Status.
- 2.) Additional Insured Endorsement issued by the insurance company to show the Additional Insured addition was made to the policy.

BIDDER/OFFEROR STATEMENT

I understand the Insurance Requirements and will comply in full if awarded this contract.

Signature:  Date: 04/08/2022

Name: Dan Ripberger Title: Managing Director
(Print)

Name of Firm: Bolton Partners, Inc.

*** THIS FORM AND THE ATTACHMENT WC -WORKERS COMPENSATION FORM 61-A MUST BE INCLUDED IN THE PROPOSAL PACKET



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

01/25/2022

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an **ADDITIONAL INSURED**, the policy(ies) must have **ADDITIONAL INSURED** provisions or be endorsed. If **SUBROGATION IS WAIVED**, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER PSA Insurance & Financial Partners, LLC 11311 McCormick Road Suite 500 Hunt Valley MD 21031-8622	CONTACT NAME: Debra Flower PHONE (A/C, No, Ext): (443) 798-7480 E-MAIL ADDRESS: dflower@psafinancial.com FAX (A/C, No): (410) 828-0242																					
INSURED BOD Group, Inc. dba Bolton Partners Inc 36 South Charles St.. Ste 1000 Baltimore MD 21201	<table><tr><th colspan="2">INSURER(S) AFFORDING COVERAGE</th><th>NAIC #</th></tr><tr><td>INSURER A:</td><td>Massachusetts Bay Insurance Company</td><td>22306</td></tr><tr><td>INSURER B:</td><td>The Hanover Insurance Company</td><td>22292</td></tr><tr><td>INSURER C:</td><td>Accident Fund Insurance Co of America</td><td>10166</td></tr><tr><td>INSURER D:</td><td>Hudson Specialty Insurance Company</td><td></td></tr><tr><td>INSURER E:</td><td></td><td></td></tr><tr><td>INSURER F:</td><td></td><td></td></tr></table>	INSURER(S) AFFORDING COVERAGE		NAIC #	INSURER A:	Massachusetts Bay Insurance Company	22306	INSURER B:	The Hanover Insurance Company	22292	INSURER C:	Accident Fund Insurance Co of America	10166	INSURER D:	Hudson Specialty Insurance Company		INSURER E:			INSURER F:		
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INSURER C:	Accident Fund Insurance Co of America	10166																				
INSURER D:	Hudson Specialty Insurance Company																					
INSURER E:																						
INSURER F:																						

COVERAGES**CERTIFICATE NUMBER:** 22/23 BOD w/Prof**REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:			ODQ9800160	01/01/2022	01/01/2023	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 300,000 MED EXP (Any one person) \$ 10,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 2,000,000 PRODUCTS - COMP/OP AGG \$ 2,000,000
B	<input checked="" type="checkbox"/> AUTOMOBILE LIABILITY <input checked="" type="checkbox"/> ANY AUTO OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> HIRED AUTOS ONLY <input checked="" type="checkbox"/> NON-OWNED AUTOS ONLY			AHQ-A437835-08	01/01/2022	01/01/2023	COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$
A	<input checked="" type="checkbox"/> UMBRELLA LIAB <input checked="" type="checkbox"/> OCCUR <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED <input checked="" type="checkbox"/> RETENTION \$ 0			ODQ9800160	01/01/2022	01/01/2023	EACH OCCURRENCE \$ 5,000,000 AGGREGATE \$ 5,000,000
C	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N <input checked="" type="checkbox"/> Y	N/A	WCV6087351	01/01/2022	01/01/2023	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER E.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000
D	Prof E & O - Actuarial Services			EEZ12297 09	07/01/2021	07/01/2022	Limit/Aggregate retention \$8,000,000 \$250,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

CERTIFICATE HOLDER**CANCELLATION**

Evidence of Insurance

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE

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AGENCY CUSTOMER ID: _____

LOC #: _____

ADDITIONAL REMARKS SCHEDULE

Page _____ of _____

AGENCY PSA Insurance & Financial Partners, LLC		NAMED INSURED BOD Group, Inc. dba Bolton Partners Inc	
POLICY NUMBER			
CARRIER	NAIC CODE		
		EFFECTIVE DATE:	

ADDITIONAL REMARKS**THIS ADDITIONAL REMARKS FORM IS A SCHEDULE TO ACORD FORM,****FORM NUMBER:** 25 **FORM TITLE:** Certificate of Liability Insurance: Notes

Hanover Insurance Company
1/1/22-23 Policy #BDQ1016447
Crime Coverage \$1,000,000 limit \$10,000 deductible

Travelers Insurance Company 7/1/21 -7/1/22
Policy #105910664
a) D & O Liability \$1,000,000 limit \$5,000 retention
b) Employment Practices Liability \$2,000,000 limit
\$10,000 retention
c) Fiduciary Liability \$1,000,000 limit retention \$0

Zeguro Insurance Company
Primary Cyber: \$5,000,000 \$25,000 deductible
Policy #01-CY-0005511244-00
Policy term 7/31/21 to 7/1/22

Allied World Specialty Insurance Company
Excess Cyber: \$5,000,000 over Zeguro \$5,000,000
Policy #0312-1699
Policy term 7/31/21 to 7/1/22

\$5,000,000 E & O limit retro date 1/1/81
\$6,000,000 E & O limit retro date 4/1/15
\$7,000,000 E & O limit retro date 4/1/16
\$8,000,000 E & O limit retro date 4/1/17

Contractor's Certification of Workers' Compensation Liability

(Form 61-A)



www.workcomp.virginia.gov

PLEASE COMPLETE FULLY AND LEGIBLY

This form must be filed in each Virginia locality where a contractor applies for or renews a business license

FILING INSTRUCTIONS ON REVERSE SIDE

Locality Issuing License: City <input type="checkbox"/> Town <input checked="" type="checkbox"/> County <input type="checkbox"/>		Name of Locality: Wytheville		Business or Trade Name:		Business License Number:	
Name of Applicant Last:		First:		Business FEIN or Tax ID Number:			
Applicant Mailing Address:				Business Address:			
City: State: Zip:				City: State: Zip:			
Home Telephone:				Business: Corp. <input type="checkbox"/> L.L.C. <input type="checkbox"/> Sole Prop <input type="checkbox"/> Partnership <input type="checkbox"/> Other <input type="checkbox"/>			
METHOD of INSURING FOR WORKERS' COMPENSATION LIABILITY:				Type of Trade or Industry:			
Indicate One:				Business Telephone: E-mail Address:			
<input type="checkbox"/> Insurance Carrier licensed in Virginia <input type="checkbox"/> Self insured with certificate of authorization issued by the Virginia Workers' Compensation Commission <input type="checkbox"/> Group Self-Insurance Association (GSIA) licensed by the State Corporation Commission <input type="checkbox"/> A Professional Employer Organization (PEO) registered in Virginia				<input type="checkbox"/> Check Here if Workers' Compensation is <i>Not</i> Required Reason: <input type="checkbox"/> Less than 3 employees (Note: Corporate officers, LLC managers, part-time employees and employees of your subcontractors generally count as your employees for workers' compensation purposes. Filing of a 1099, payment of cash wages or designating a worker an "Independent Contractor" does not necessarily alter employee status under the Workers' Compensation Act.) <input type="checkbox"/> Other (Explain)			
Name of Insurance Carrier, Self-Insured, GSIA or PEO:				If you answered workers' compensation Not Required, answer below: Do you hire Independent Contractors or subcontractors to assist you in your work?			
Policy, Master Policy or Certificate Number:				<input type="checkbox"/> Yes <input type="checkbox"/> No			
Policy Effective Date and Policy Period:							

For VWC Use Only:

Under penalty of law, the undersigned certifies s/he is duly authorized by the business license applicant to execute this certificate; the information provided herein is correct; and the business is in compliance with Chapter 8 of Title 65.2 of the Virginia Workers' Compensation Act and will remain in compliance with the law during the effective period of the business license.

Signature of Applicant 	Date 04/08/2022
Print Name of Applicant James Downing, Chief Executive Officer	

Form 61-A is prepared and distributed by the Virginia Workers' Compensation Commission to local licensing authorities for use in compliance with Section 58.1-3714, Code of Virginia. Form 61 A is also available online at www.workcomp.virginia.gov

If there are any questions regarding this form, please contact the Commission toll-free at 1-877-664-2566

ATTACHMENT F.

NOTICE OF EXCEPTIONS

PLEASE SELECT ONE OF THE FOLLOWING BOXES, SIGN THE FORM, AND RETURN THIS FORM WITH YOUR BID/PROPOSAL SUBMISSION.

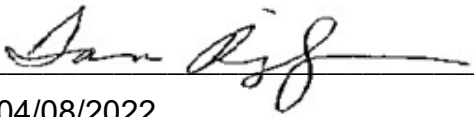
☒ My firm does not have any exceptions to the bid proposal to list on this form. We accept the terms and conditions as listed.

☐ Technology proposal exception. Per Virginia Code § 2.2-4302.2 (3): "In the case of a **proposal for information technology**, as defined in § 2.2-2006, a public body shall not require an offeror to state in a proposal any exception to any liability provisions contained in the Request for Proposal. Negotiations shall then be conducted with each of the offerors so selected. The offeror shall state any exception to any liability provisions contained in the Request for Proposal in writing at the beginning of negotiations, and such exceptions shall be considered during negotiation."

☐ A/E proposal exception. Per Virginia Code § 2.2-4302.2 (4): "**For architectural or engineering services**, the public body shall not request or require offerors to list any exceptions to proposed contractual terms and conditions, unless such terms and conditions are required by statute, regulation, ordinance, or standards developed pursuant to § 2.2-1132, until after the qualified offerors are ranked for negotiations."

WHEN APPLICABLE LIST ANY EXCEPTIONS BELOW:

The following is a list of exceptions that I have to the bid proposal.

Signed by: 
Date: 04/08/2022

*** THIS FORM MUST BE INCLUDED IN THE PROPOSAL PACKET

ATTACHMENT G. BUSINESS LICENSE & PROFESSIONAL LICENSE

The firm is required to show proof of a business license and proof of any professional licenses required to operate in the Commonwealth of Virginia.

In accordance with the Wytheville Town Code, Section 7-19," It shall be unlawful and shall constitute a misdemeanor for any person to conduct a business, or to engage in a profession, trade or occupation within the municipality, without first procuring a license as required under the provisions of this article."

This clause pertains to all businesses that physically locate an office in the town and/or any contractors who perform work in the town. This clause does not pertain to professional services when a home office is in another jurisdiction.

If chosen and prior to the award of a contract, a firm which is required to obtain a Town of Wytheville Business License will be required to submit a copy of the license. More information regarding The Town of Wytheville Business License is available at the Treasurer's Office or by visiting <https://www.wytheville.org/business>

Name of Firm and Town of Wytheville Business License Number: (Indicate N/A if not applicable)

N/A

If the firm's home office is located in another jurisdiction, it may be required to have a business license from the jurisdiction in which it is located. Complete the information below or indicate N/A:

Name of Firm:	Locality:	Business License Number:
Bolton Partners, Inc.	Baltimore, MD	52-1231144

Other Required License(s):

***List any other professional licenses which may be required to conduct this business in the Commonwealth of Virginia. List in the space below. Indicate N/A if this is not applicable to the scope of work.

N/A

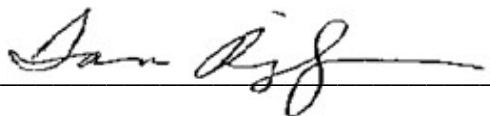
***** Licensed contractors shall submit the DPOR License Number on the outside of the sealed bid packet in addition to using this form.**

***** THIS FORM MUST BE SUBMITTED WITH THE BID PACKET**

ATTACHMENT H. SELF CERTIFY STATUS (SWAM, DBE, Other)

The Virginia Small Business Supplier Diversity Agency maintains a list of firms that are SWAM and DBE certified. Small, Women-owned, Minority-owned, Micro, Service-Disabled Veteran-owned, and ESO Businesses (SWAM) can become certified if the firm so chooses and listed at the website <https://www.sbsd.virginia.gov/directory/> . This website provides a link to the Federal Disadvantaged Business Enterprise (DBE) certification process and list for those who qualify for the federal certification.

If your business is SWAM and/or DBE Certified please indicate below. If the firm is not self-certified indicate with N/A in the space provided.

Signature: 

Date : 04/08/2022

Title: Managing Director

Name of Firm: Bolton Partners, Inc.

Status: _____

Not Applicable/ No Status to report: X

*** THIS FORM MUST BE INCLUDED IN THE BID PACKET

ATTACHMENT I.

REFERENCE LIST

If required, and when stated as a requirement in the bid/proposal packet, list three (3) references who have employed the offeror and/or used related services to the scope of this proposal.

If references are not required as part of this bid put N/A here: _____

Company	Contact Name	Phone	Email	Year of Contract	Project Name
Baltimore County, MD	Kevin Reed	(410) 887-1530	kdreed@baltimorecountymd.gov	current	Classification & Compensation Study
Takoma Park, Maryland	Tracy Smith	(301) 891-7201	tracys@takomaparkmd.gov	2020	Classification & Compensation Study
State of North Carolina	Nancy Astrike	(919) 807-4814	nancy.astrike@nc.gov	current	Classification & Compensation Study

*** THIS FORM MUST BE INCLUDED IN THE PROPOSAL PACKET

APPENDICES

Appendix A: Public Sector Client List

APPENDIX A

Public Sector Client List

Anne Arundel Community College, MD	City of Griffin, GA	Delaware River & Bay Authority
Anne Arundel County, MD Government	City of Hialeah Gardens, FL	Delaware Transit Corporation
Anne Arundel County, MD Public Library	City of Hollywood, FL	Department of Justice
Baltimore County, MD Government	City of Hyattsville, MD	Dinwiddie County, VA
Baltimore County, MD Public Schools	City of Lake Mary, FL	Dinwiddie County, VA School Board
Bedford County, VA	City of Laurel, MD	District of Columbia Retirement Board
Bedford County, VA Public Schools	City of Lexington, VA	Dorchester County, MD
Bedford Regional Water Authority	City of Maitland, FL	Dorchester County, MD Board of Education
Broward County, FL	City of Manassas, VA	Eastern Shore of Maryland
Buffalo, NY Public Schools	City of Manassas, VA Public Schools	Emerald Coast, FL Utilities
Calvert County, MD	City of Melbourne, FL	Employees Retirement System of Texas
Calvert County, MD Public Schools	City of Miami Gardens, FL	Florida Department of Financial Services
Warrenton, MD Board of Education	City of Miramar, FL	Fort Myers Shore Fire, FL
Warrenton, MD Government	City of New Smyrna Beach, FL	Frederick Community College, MD
Warrenton, MD Public Schools	City of New York, NY	Frederick County, MD Government
Carroll County Community College, MD	City of North Fort Myers, FL	Frederick County, MD Public Schools
Carroll County, MD	City of Norwich, CT	Frederick County, VA Government
Carroll County, MD Public Schools	City of Orlando, FL	Frederick County, VA Public Schools
Cattaraugus County, NY	City of Palm Beach Gardens, FL	Garrett County, MD Government
Cecil County, MD Commissioners	City of Pittsburgh, PA	Garrett County, MD Public Schools
Cecil County, MD Government	City of Plainfield, NJ	Gloucester County, VA
Cecil County, MD Public Schools	City of Pocomoke, MD	Hallandale Beach, FL Police Officers' & Firefighters' Personnel Retirement #402
Charles County, MD Government	City of Pompano Beach, FL	Hampton Roads, VA Sanitation
Charles County, MD Public Schools	City of Providence, RI	Hanover County, VA Government
Charlotte-Mecklenburg, NC Schools	City of Reading, PA	Harford Community College, MD
Chatham County, GA	City of Riviera Beach, FL	Harford County, MD
Cherokee County, GA	City of Rockville, MD	Harford County, MD Public Library
Chesapeake, VA Public Schools	City of Salisbury, MD	Harford County, MD Public Schools
Chicago Regional Transportation Authority	City of Sanford, FL	Hazleton City, PA Pension Board
City of Austin, TX	City of Sarasota, FL	Higher Ground Education
City of Baltimore, MD	City of Takoma Park, MD	Highlands County, FL
City of Boca Raton, FL	City of West Palm Beach, FL	Housing Authority of Baltimore City, MD
City of Bowie, MD	City of Westminster, MD	Howard Community College
City of Cambridge, MD	City of Wilmington, DE	Howard County, MD
City of Cape Coral, FL	City of Winchester, VA	Howard County, MD Government
City of Chesapeake, VA	Clay County, TX	Howard County, MD Library
City of Cocoa, FL	College of Southern Maryland	Howard County, MD Public School System
City of Doral, FL	Colorado Department of Health Care	Indian Trail Improvement District
City of Doral, FL	Community College of Baltimore County	Inter-University Council of Ohio
City of Dover, DE	County of Albemarle, VA	Ithaca City, NY School District
City of El Paso, TX	County of Culpeper, VA	Jacksonville, FL Transportation Authority
City of Flagler Beach, FL	County of Hawaii, HI	James City County, VA
City of Fort Myers Shores, FL	County of Lancaster, PA	Kent County, MD Government
City of Frederick, MD	Coweta County, GA	Kent County, MD Levy Court
City of Gaithersburg, MD	Culpeper County, VA Schools	
City of Greenbelt, MD	Dawson County, GA School System	

Kent County, MD Public Schools
Kilmarnock, VA
King George County & Schools, VA
King William County, VA
Lake Worth, FL Drainage District
Lehigh Acres, FL Fire Control
Loudoun County, VA Public Schools
Loudoun County, VA Sanitation Authority
Lower Merion Township, PA
Macon-Bibb County, GA
Manassas Park, VA City Schools
Manatee County, FL
Maryland Dept of Legislative Services
Maryland State Retirement Agency
Metropolitan Water Reclamation
Milwaukee County, WI
Monroe County, FL
Montgomery County, MD Council
Montgomery County, MD Government
Montgomery County, MD Public Schools
New Hampshire Public Employees
New Horizons Regional Education Center
New Jersey Transit Corporation
New Kent County, VA Public Schools
New York Power Authority
New York State Thruway
Newport News, VA Public Schools
Niagara Frontier Transportation Authority
North Fort Myers, FL Fire District
Ocean County, NJ Utilities Authority
Oneida County, NY
Orange County, VA
Oswego City, NY School District
Palm Harbor, FL Fire Rescue
Pennsylvania State Education
Philadelphia, PA Parking Authority

Port LaBelle, FL
Postal Regulatory Commission
Prince George's County, MD Government
Prince George's County, MD Schools
Prince William County, VA Schools
Prince William County, VA
Queen Anne's County, MD Government
Queen Anne's County, MD Public Schools
Rappahannock County, VA
Rappahannock County, VA Public Schools
Regional Income Tax Agency
Roanoke County, VA
Roanoke County, VA Public Schools
Rockingham County, VA Government
Rockingham County, VA Public Schools
San Jose Police Officers Association, CA
San Luis Obispo County, CA Pension Trust
Santa Rosa County, FL
School District of Philadelphia, PA
Shenandoah Valley Juvenile Center
Somerset County, NJ Board of Education
South Central Wastewater
South Florida Conservancy District
Spotsylvania County, VA Government
Spotsylvania County, VA Public Schools
St. Lucie County, FL Fire District
St. Mary's County, MD Government
St. Mary's County, MD Library
St. Mary's County, MD Public Schools
Stafford County, VA Government
Stafford County, VA Public Schools
State of Alaska
State of Maine
State of Montana
State of Oregon
State of Wisconsin

Stevenson University
Suffolk County Community College, NY
Talbot County, MD
Talbot County, MD Board of Education
Thomas County, GA School District
Town of Centreville, MD
Town of Chestertown, MD
Town of Colmar Manor, MD
Town of Cutler Bay, FL
Town of Davie, FL
Town of Edison, NJ
Town of Elkton, MD
Town of Juno Beach, FL
Town of Leesburg, VA
Town of Mount Airy, MD
Town of Ocean City, MD
Town of Orange, VA
Town of Riverdale Park, MD
Town of Sykesville, MD
Town of Thurmont, MD
Town of University Park, MD
Upper Occoquan Service Authority
Vernon-Verona Sherrill Central Schools,
NY
Village of Oak Park, IL
Village of Royal Palm Beach, FL
Washington County, FL
Washington County, MD
Washington County, MD Public Schools
Washington Suburban Sanitary Comm
West Virginia State Police
Wicomico County, MD Board of Education
Wicomico County, MD Government
Williamsburg-James City, VA Schools
Worcester County, MD Board of Education
Wor-Wic Community College, MD