



**SCERS**

**SACRAMENTO COUNTY  
EMPLOYEES'  
RETIREMENT SYSTEM**

REQUEST FOR PROPOSAL-

COMPENSATION  
CONSULTANT

RFP Number: 2026-Gen-0017  
RFP Issue Date: February 20, 2026  
RFP Submission Deadline: March 20, 2026

Issued by: Margo Allen, Chief Operations Officer

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## I. INTRODUCTION

### A. Purpose of Request

The Sacramento County Employees' Retirement System (SCERS, the System) is seeking a qualified compensation consulting firm (Consultant) to provide independent, objective compensation consulting services to support SCERS' Board of Retirement (Board) and executive leadership. The selected Consultant will conduct salary compensation studies for 15 classifications, to ensure compensation practices are competitive and equitable, and provide Compensation Policy support to the Board.

Any inquiries concerning this Request for Proposal (RFP) must be submitted through the OpenGov portal at <https://procurement.opengov.com/portal/saccounty/projects/239531> by 5:00 p.m. PST on March 6, 2026. All questions must reference the RFP section and page number to which the question refers. SCERS will post responses on the OpenGov portal prior to the question response deadline date posted on OpenGov.

Respondents must submit an electronic copy of the written response to this RFP using the OpenGov portal no later than 5:00 p.m. PST on March 20, 2026. SCERS reserves the right to reject any proposal submitted. An evaluation committee consisting of key SCERS staff will review all proposals and provide a recommendation to the Board's Compensation Committee for consideration, with final approval by the full Board.

The term of the engagement is based upon the completion of deliverables and is not to exceed 12 months. Additional deliverables and term extensions are subject to review and approval by the Board of Retirement and satisfactory negotiation of terms, including pricing acceptable to SCERS.

This RFP details the requirements needed by SCERS and instructs interested proposers on the application and selection process. The services required are described in more detail in Section II. A, Scope of Work.

### B. Background

Sacramento County Employees' Retirement System (SCERS) is a multiple-employer public employee retirement system, enacted and administered in accordance with the provisions of the County Employees Retirement Law of 1937 (California Government Code Section 31450, et seq.) (1937 Act). Since its creation by the Sacramento County Board of Supervisors in 1941, SCERS has provided retirement, disability, and survivors' benefits to eligible participants which include permanent full-time and part-time employees of the County of Sacramento, the Sacramento County Superior Court, and ten Special Districts. SCERS has approximately 13,952 active members, 14,606 retired members, and 5,102 inactive members. As of June 30, 2025. SCERS' net position restricted for pension benefits totaled approximately \$14.5 billion. For additional information, visit SCERS' website at [SCERS.gov](http://SCERS.gov) or by [Clicking Here](#).

The Board of Retirement has responsibility over administration of the system in accordance with governing law, managing risk, and protecting both plan assets and the interest of the plan beneficiaries. The Board of Retirement consists of eleven board members of which two are alternate members.

The day-to-day management of SCERS is delegated to a Chief Executive Officer appointed by the Board of Retirement. SCERS staff are responsible for daily operations involving the administration of retirement, disability and death benefits, member services, accounting functions, systems management, and portfolio administration. SCERS collects, deposits, invests, and manages retirement trust funds solely in the interest of, and for the exclusive purpose of providing benefits to, participants and their beneficiaries. SCERS acts as fiduciary agent for the accounting and control of member and employer contributions and investment income.

## II. SCOPE OF WORK

The selected compensation consulting firm, hereafter referred to as the "Consultant," will conduct compensation studies for designated classifications including the following:

Chief Executive Officer  
General Counsel  
Chief Investment Officer  
Deputy Chief Investment Officer  
Chief Benefits Officer  
Chief Operations Officer  
Chief Technology Officer  
Senior Investment Officer  
Investment Officer  
Investment Analyst  
Retirement Services Manager  
Retirement Services Analyst  
Retirement Services Supervisor  
Senior Retirement Benefits Specialist  
Retirement Benefits Specialist

The Consultant shall be responsible for the preparation of reports, findings, and other written documentation, and presentations to the Board and executive staff.

The Consultant shall also facilitate discussions with the Retirement Board Compensation Committee on reviewing and updating the SCER Compensation Policy as it pertains to methodology, comparison peer group, and research and analysis of incentive pay programs. The current policy can be found here: <https://www.scers.gov/post/compensation-policy>

### III. PROJECT COORDINATION REQUIREMENTS

#### A. Professional Standards

The Consultant shall perform all services in accordance with generally accepted professional compensation consulting practices and applicable federal, state, and local laws and regulations, including but not limited to:

- Applicable California Government Code provisions
- Public sector compensation best practices
- Ethical standards of relevant professional organizations

#### B. Work Paper Retention

All work papers, analyses, and reports must be retained at the Consultant's expense for a minimum of five (5) years unless otherwise directed by SCERS. The Consultant shall maintain the confidentiality of all SCERS data and make materials available to SCERS upon request.

#### C. Irregularities and Illegal Acts

The Consultant shall promptly disclose any actual or potential conflicts of interest or issues that may impair independence or objectivity in providing services to SCERS.

### IV. TENTATIVE TIMETABLE

SCERS intends to progress in this procurement in a series of orderly steps. The schedule that follows has been developed to provide adequate information for respondents to prepare definitive proposals and to permit SCERS to fully consider various factors that may affect its decision. This schedule is subject to change at the discretion of SCERS. SCERS will provide sufficient advance notice to respondents in the event of schedule changes. Key dates for this solicitation are:

Event Description	Due Date
SCERS RFP Issued	February 20, 2026
Submission – RFP Questions Deadline	March 6, 2026
SCERS Response to Written RFP Questions	March 13, 2026

<b>Submission - RFP Response Deadline</b>	<b>March 20, 2026</b>
Contact Respondents and Invitations to Interview, as Warranted	April 6-10, 2026
Final Selection and Approval	By April 15th, 2026
Contract Proceedings	April 2026

**V. REQUIREMENTS AND INSTRUCTIONS FOR RFP RESPONSE**

**A. Proposal Submission Guidelines**

Respondents must submit an electronic copy of the written response to this RFP no later than 5:00 p.m. PST on March 20, 2026. Proposals must be submitted through the OpenGov portal at <https://procurement.opengov.com/portal/saccounty/projects/239531>. Responses received after the specified deadline may be considered for evaluation solely at the discretion of SCERS.

Respondents are required to carefully read, examine, and understand the solicitation, terms, conditions, forms and other documents, laws and rules, as noted in this RFP before submitting a proposal. The submission of the proposal shall be a warranty and representation that the respondent has made a careful examination, has read, and understands the specifications, terms and conditions of this RFP and agrees to provide and perform per same. The information submitted in response to this RFP will become the exclusive property of SCERS and will not be returned to the respondent. If Respondent intends for any confidential information to be exempted from public disclosure, then submissions should also include one **electronic copy** marked "**REDACTED**". The redacted copy should redact all material from the proposal that the respondent believes in good faith is exempt from disclosure under the California Public Records Act. (California Government Code section 7920.000 *et seq.*, the "CPRA") Individual redactions should appear as blacked out material. Large sections, tables, or entire blank page(s) shall include the word "REDACTED" or "PROPRIETARY" inserted. Each respondent must indicate the basis for each redaction. SCERS cannot guarantee that redacted information will not be publicly available, and SCERS reserves the right in its sole discretion to produce the entire RFP without redaction.

**B. Proposal Format and Content**

The proposals are to address all the questions posed by SCERS in the order in which they appear in this RFP. All requested information must be provided in the format and order described below. Answers are to be succinct in 12-point font and page limit maximums (as indicated below) are to be complied with.

**1. Cover Letter/Proposal**

A one (1) page cover letter shall be signed by the individual(s) who is (are) authorized to bind

the respondent contractually. The letter shall contain a statement to the effect that the respondent has; no conflicts of interest in performing the services outlined in this RFP, is not currently under investigation by any regulatory agency, state or federal, for any reason. This letter should summarize the services the firm will perform for SCERS, the specific team that will be working on SCERS' account, including the lead partner(s) on the team, and proposed fee structure.

Your cover letter/proposal should include the following items:

- A. Identify the submitting organization;
- B. Identify the name, title, telephone and fax numbers, and e-mail address of the person authorized by the organization to contractually obligate the organization;
- C. Identify the name, title, telephone and fax numbers, and e-mail address of the person authorized to negotiate the contract on behalf of the organization;
- D. Identify the names, titles, telephone and fax numbers, and e-mail addresses of persons to be contacted for clarification;
- E. Be signed by the person authorized to contractually obligate the organization;

## **2. Qualifications**

Provide a brief summary of your company's history, its capabilities, and its recent relevant experience (last five years). Also, describe your demonstrated experience with similar projects and qualification including professional licenses and certifications.

## **3. Key Personnel**

Describe the project team composition and include resumes of key personnel. Proposed members should be available to begin the engagement in 90 (ninety) days from the proposal due date. SCERS must be promptly notified of any changes in key personnel prior to award.

## **4. References**

List a minimum of three (3) references for whom comparable services were provided to in the last five (5) years. Include the name of the firm, name of the contact, telephone number of the contact, email address of contact (if available), brief description of the services provided and your firm's role, and the start and completion date.

## **5. Project Work Plan**

Describe your understanding of the project and approach. Include deliverables, milestones, assumptions, and identify potential risks that could delay the project. List any resources you expect SCERS to provide.

## **6. Cost Proposal**

Provide a proposed total fee outlining the proposal and identify the hourly fee schedule for all personnel to be involved in the project. The hourly rates should include fringe benefits, indirect costs and profit. The Consultant should also indicate what percentage of the scope of work is expected to be completed by each individual or pay classification included in fee proposal. Additionally, if applicable, a schedule of reimbursable expenses should be included.

### **C. RFP Development Cost**

All costs and expenses associated with responding to this RFP are at the sole expense of the respondent. SCERS is not obligated to the respondents in any manner and will not reimburse or pay any cost incurred by respondent.

### **D. RFP Quiet Period**

Upon publication of this RFP, a "Quiet Period" will be in effect from the date of issuance of this RFP (February 20, 2026) until the selection of one or more respondents is completed and announced (tentatively April 15, 2026) to ensure that the RFP process is efficient, diligent, and fair. The quiet period is a "no contact period" during which all Board Members and staff, except for a SCERS designated Point of Contact, shall refrain from communicating with respondents reviewing or otherwise participating in this RFP. The quiet period shall continue until a final selection is made and a contract between SCERS and the respondent is executed, or the process is otherwise terminated.

The quiet period does not prevent Board-approved meetings and communications by staff with any respondent to the extent such communication is necessary for the due diligence process or necessary in connection with other SCERS business. Other than due diligence, discussion related to the pending selection is not permitted. Any contact relating to the RFP with any SCERS board member, staff or consultant shall be grounds for disqualification. A list of current Board members is located on SCERS' website.

### **E. Cancellation of Request for Proposal**

This RFP may be cancelled and any or all proposals may be rejected in whole or in part, when it is determined to be in the best interests of SCERS.

### **F. Waiver/Cure of Minor Informalities, Errors and Omissions**

SCERS reserves the right to waive or permit cure for minor informalities, errors or omissions prior to the selection of a proposal, and to conduct discussions with any qualified respondents and to take any other measures with respect to this RFP in any manner necessary to serve the best

interests of SCERS and its beneficiaries. SCERS reserves the right to discuss any part of any response with respondents for the purpose of clarification. In addition, SCERS reserves the right to request additional information or clarifications from respondents, or to allow corrections of errors or omissions.

#### **G. RFP Point of Contact**

Direct all questions, inquiries, and requests for additional information concerning this RFP to Margo Allen, Chief Operations Officer no later than **3:00 PM PST, March 6, 2026** by e-mail ([allenmargo@saccounty.gov](mailto:allenmargo@saccounty.gov)). All questions received and responses thereto will be posted on the OpenGov portal on or about **3:00 PM PST, March 13, 2026**.

#### **H. RFP Evaluation Quiet Period**

Please note that during this evaluation process SCERS staff will not answer any questions related to the RFP except as set forth in the above paragraph. After March 6, 2026, if a question appears unclear to you, please state your interpretation of the question and answer it accordingly.

To ensure that prospective service providers responding to this RFP have equal access to information regarding the RFP and communications related to the RFP are consistent and accurate so that the selection process is efficient and fair, a "Quiet Period" will be in effect from the date of issuance of this RFP until the selection of one or more respondents is completed and announced. During the Quiet Period, respondents are not permitted to communicate with any SCERS staff member or Board Trustees regarding this RFP except through the point of contact named herein. Respondents violating the Quiet Period may be disqualified at SCERS' discretion. Respondents who are existing SCERS service providers must limit their communications with SCERS staff and Board Trustees to the subject of the existing services provided by them.

#### **I. Modification or Withdrawal of Proposals**

##### **1. Modification**

A written notice must be submitted via email to the RFP Point of Contact, listed above in section V.G, stating that a modification to a submitted proposal is being provided by the respondent. The notice must reference the page number and section modified by the respondent when resubmitting a response to this RFP. A proposal may not be changed after the designated deadline for submission of proposals.

SCERS may modify any part of the RFP, prior to the date fixed for final submission of responses, by issuance of an addendum which shall be posted on the OpenGov portal and on

SCERS' website. All Addendum will be numbered consecutively.

## **2. Withdrawal**

All proposals shall be firm and may not be withdrawn for a period of 90 days following the date of submission. A respondent may withdraw a proposal at any time prior to the submission deadline by submitting a written notification of withdrawal via email to the RFP Point of Contact, listed above in section V.G, that is signed by the respondent or authorized agent. Another proposal may be submitted prior to the RFP deadline.

## **J. Rejection of Proposals**

SCERS reserves the right to reject any and all proposals and to waive informalities and minor irregularities in any proposals received. Absence of required information may render a proposal non-responsive, resulting in rejection of the proposal by SCERS. An error in the proposal may cause rejection of that proposal, though. SCERS may, in its discretion, retain and consider the proposal. SCERS may also request clarification from a respondent of any item in a proposal that SCERS believes to be in error.

The following non-exclusive list will lead to disqualification: misrepresentation or omission of facts in respondent's proposal or in any other communication from respondent in connection with this RFP, or seeking or causing intervention by third parties, where the purpose is to achieve special advantage in the award of any resulting contract.

## **VI. EVALUATION PROCESS**

This section describes the guidelines to be used for analyzing and evaluating proposals. SCERS reserves the right to evaluate all factors deemed appropriate, whether or not such factors have been stated in this section.

An evaluation committee consisting of SCERS staff will review the RFP responses and submit their evaluation results and award recommendations to the Board's Compensation Committee.

In accordance with Government Code Section 87100, SCERS' RFP evaluation committee members will not participate in the selection process if they have a relationship with any person or business entity submitting a proposal. Likewise, any respondent who has such a relationship with SCERS staff or a Compensation Committee member who may be involved in the selection process must notify the RFP Point of Contact, identified above in Section V.G and disclose the nature of the relationship and the member.

**A.** An initial screen and assessment will be conducted to both ensure that minimum qualifications

are met and that proposals align with the objectives of the search.

- B. Responses that meet minimum qualifications and shall be subject to evaluation and scored on the following categories by the review committee:
  - 1. Work Plans/Timelines (25%)
  - 2. Engagement Team Experience and Credentials (20%)
  - 3. Knowledge and Experience (30%)
  - 4. Cost Proposal (15%)
  - 5. Quality of Work/Technical Capabilities (10%)
- C. SCERS staff may select Respondents based upon the selection criteria or using a combination of interviews, either in-person or virtually, and reference verification.
- D. The highest scoring Respondents may be invited to an interview by the Board's Compensation Committee in April 2026. At SCERS' discretion, selected Respondents may be offered the opportunity to present their materials to the full Board.
- E. A recommendation for the award will be made based on the RFP responses.
- F. Based on the RFP evaluation committee results, a final recommendation will be made to the Compensation Committee, with final approval by the Board, and the respondent will receive a Notice of Intent to Award via e-mail by April 15, 2026.

The process, procedures, and evaluation criteria used by SCERS' evaluation committee in developing and issuing this RFP and for evaluating the proposals received for the purposes of making a recommendation to the Compensation Committee and Board shall be determined in the sole discretion of SCERS. Potential respondents shall have no rights whatsoever regarding the processes and procedures used by SCERS relating to this RFP or the manner in which a respondent is selected by either the evaluation committee, Chief Executive Officer, Compensation Committee, or the Board, provided there is some reasonable basis for the selection(s) made.

SCERS reserves the right to conduct a background inquiry of each respondent, which may include collection of appropriate criminal history information, contractual and business associations and practices, employment histories, reputation in the business community, and financial condition. By submitting a proposal to SCERS, the respondent consents to such an inquiry and agrees to make available to SCERS any records deemed necessary to conduct the review.

## **VII. LEGAL MATTERS**

### **A. Notice to Respondents Regarding Public Records and Meetings**

Upon entering any agreement with a respondent to this RFP, or upon the hearing of a recommendation to enter into any agreement with a respondent at a public meeting, all

proposals submitted shall be regarded as public records, subject to disclosure upon request pursuant to the CPRA. SCERS shall not in any way be liable or responsible for the disclosure of any such records including those marked as confidential if disclosure is deemed to be required by law. SCERS will provide respondent with notice prior to disclosure of records marked as confidential so that respondent can file any desired motion for a protective order. Respondents are advised that SCERS does not wish to receive confidential or proprietary information, and that respondents should not supply such information unless it is absolutely necessary. Respondents further acknowledge that SCERS is subject to the Ralph M. Brown Act which governs open meetings for local government bodies. (California Government Code section 54950 *et seq.*)

Submission of a proposal by a respondent constitutes a complete waiver of any claims whatsoever against SCERS, and/or its agents, officers or employees, that SCERS has violated a respondent's right to privacy, disclosed trade secrets or caused any damage by allowing the proposal to be inspected. Nothing in this RFP requires SCERS to withhold any documents from production under the CPRA.

#### **B. Notice to Respondents Regarding Protecting SCERS' Data**

SCERS, its consultants, vendors, and contractors have a duty to protect all SCERS data, including without limitation, information related to members and beneficiaries, finances, systems, and operations. The finalist selected through this procurement will have access to sensitive information protected by SCERS' internal policies and applicable State and Federal law. By submitting a proposal, the respondent agrees to subject itself to certain contractual terms designed to protect such information, including reasonably practical and commercially viable security policies, standards, procedures and safeguarding measures consistent with other professionals practicing in a like enterprise.

### **VIII. RESPONSES BECOME SCERS PROPERTY**

The information you submit in response to this RFP shall become the exclusive property of SCERS. Your response will not be returned to you, and SCERS will not reimburse you for response preparation expenses.

### **IX. CONTRACT NEGOTIATIONS**

The parties will engage in good faith negotiations to arrive at a written agreement for services that will incorporate this RFP and the vendor's proposal by reference. SCERS reserves the right to terminate any negotiations with the selected respondent, or any subsequently ranked respondent in its discretion, in the event of protracted negotiations beyond the time contemplated by the schedule in Section IV, above.

SCERS reserves the right to conduct a background inquiry of each respondent, which may include

collection of appropriate criminal history information, contractual and business associations and practices, employment histories, reputation in the business community, and financial condition. By submitting a proposal to SCERS, the respondent consents to such an inquiry and agrees to make available to SCERS any records deemed necessary to conduct the review.

Upon approval of the Board, SCERS will enter contract negotiations with the approved Respondent(s) or clarification of the proposal. SCERS may end negotiations, at its sole discretion, if it believes a satisfactory agreement cannot be negotiated with the preferred respondent. SCERS may, at its sole discretion, proceed to negotiations with the next highest-ranked respondent until an agreement is successfully completed. SCERS reserves the right to award a contract based upon proposals received; you should not rely upon the opportunity to alter your proposal (e.g., services to be provided, fees, etc.) during contract negotiations.

## **X. RESERVATIONS BY SCERS**

In addition to the other provisions of this RFP, SCERS reserves the right to:

- Cancel or modify this RFP, in whole or in part, at any time.
- Make such investigation as it deems necessary to determine the respondent's ability to furnish the required services, and the respondent agrees to furnish all such information for this purpose as SCERS may request.
- Reject the proposal of any respondent who has failed to comply with the requirements of this RFP, or who is not currently in a position to perform the contract, or who has previously failed to perform similar contracts properly, or in a timely manner or for any other reason in SCERS' sole discretion.
- Waive irregularities to negotiate in any manner necessary to best serve the public interest, and to make a whole award, multiple awards, a partial award, or no award.
- Award a contract, if at all, to the firm which will provide the best match to the requirements of the RFP and the service needs of SCERS in SCERS' sole discretion, which may not be the proposal offering the lowest fees or achieving the highest score.
- Request additional documentation or information from respondents. Requested information may vary by respondent. SCERS may ask questions of any respondent to seek clarification of a proposal or to ensure the respondent understands the scope of the work or other terms of the RFP.
- This RFP does not commit SCERS to proceed with any engagement for the audit services described herein, to pay any costs incurred in the preparation of a response, or to procure or contract for any such services at any time. SCERS expressly reserves the right to accept or reject any responses received as a result of this solicitation or to cancel this solicitation in part or in its entirety.

- The right to choose not to enter into an agreement with any of the respondents to this RFP or negotiate for the services described in this RFP with a party that did not submit a proposal.
- Determine the extent, without limitation, to which the services of a successful respondent are or are not actually utilized.
- Defer selection of a winning bidder to a time of SCERS' choosing.
- Consider information about a respondent in addition to the information submitted in the response or interview.