

Office of the Illinois State Treasurer
Michael W. Frerichs

Request for Proposals Desk/Job Audit
370-800-17-001

Addendum 2
August 26, 2016

Below are the questions received by the Office of the Illinois State Treasurer (“Treasurer”) and the Treasurer’s responses. Any capitalized terms that are not defined herein have the meaning set forth in the Request for Proposals Desk/Job Audit (370-800-17-001) (“RFP”) published by the Treasurer on August 5, 2016.

1. How many offices does the Office of the Illinois State Treasurer (“The Treasurer or the Office”) have across the State of Illinois where employees are located / work?

The Treasurer has offices located in Chicago, Springfield, Rockford, and Rock Island, Illinois. 70% of the Treasurer employees are located in Springfield, Illinois.

2. What is the distance, spread between offices noted above?

The Treasurer has one office location in Chicago, Rockford, and Rock Island, Illinois. However, the Treasurer has three separate offices buildings in Springfield, Illinois that are only a few blocks apart from each other.

3. Does the Treasurer have any employees working at home based locations? If so, where?

No, the Treasurer has no employees working from home.

4. How are the 200 jobs noted in the RFP spread across different functions / units?

The approximately 200 jobs are currently spread across different departments as follows:

- a. Accounting: 16;
- b. Civic Engagement: 16;
- c. College Savings: 1;
- d. Communications: 5;
- e. Executive: 7;
- f. Fiscal: 8;
- g. Human Resources: 3;
- h. IT: 14;

- i. Internal Audit: 3;
- j. Illinois Funds/E-Pay: 15;
- k. Legal: 8;
- l. Legislative Affairs: 3;
- m. Policy and Programs: 5;
- n. Operations: 9;
- o. Portfolio: 3;
- p. Scheduling: 2;
- q. State Portfolio and Banking: 16; and
- r. Unclaimed Property: 44.

5. Does the Treasurer have written job descriptions for all positions/roles noted in the RFP?

Yes, the Treasurer has written job descriptions for all of the positions noted in the RFP.

6. Does the Treasurer have available performance metrics for each of its employees?

The Treasurer has performance appraisals for 95% of all current employees.

7. How is the Treasurer's Office structured? Can an organization chart be provided to detail the structure?

See Attachment 1.

a. What is the hierarchy in terms of levels?

See Attachment 1.

8. What can you please share the Office's promotion and turnover rates?

There have been 22 internal promotions since January 2015 to present. There have been 68 retirements, resignations or terminations during the same time period.

a. What is reason people stay?

People stay with the Treasurer, because they enjoy working here, and they appreciate the state employee benefits and retirement package.

b. What is the reason people leave?

People leave the Treasurer due to retirement or because they have been offered a higher position within a State agency.

9. What is the average tenure?

On average, employees with the Treasurer have a tenure of 6.5 years.

a. In what area?

In general, the Treasurer's employees in Accounting, Banking, and Unclaimed Property have the longest tenure.

b. By location?

By location, the average employee tenure is as follows:

- i. Chicago: 3.2 years;
- ii. Springfield: 7.6 years;
- iii. Rockford: 9.2 years; and
- iv. Rock Island: 0 years.

10. What is the single, most critical outcome this project must address?

In addition to performing the Services, the most critical item the Contractor must address is to determine whether the current staffing levels are appropriate and whether the current job descriptions and pay levels for positions are suitable.

11. Does the Treasurer's Office have approved budget for this project?

The Treasurer does not have an approved budget for the Services at this time. Upon submission and review of Respondents' cost proposals, the Treasurer anticipates approving a project-specific budget for the Services.

12. Are there other competing initiatives currently taking place within the Treasurer's Office involving the 200 employees outside of normal operations?

Other than normal operations, the Treasurer currently has no initiatives that would compete with the Services.

13. What were the most recent HR organizational and technical changes that have taken place? What was the timeframe around those changes?

In January 2015, there was staff turnover and reorganization, which took place over the first six months of 2015. A smaller reorganization occurred in July 2016.

14. What has been communicated already to the organization around this effort?

All of the Treasurer's senior staff members have been kept informed as to the progress of this RFP. They have been asked to communicate with their managers and staff as appropriate.

15. Will the Treasurer's Office consider an extension to the deadline for submitting this proposal? Vendor questions will be posted on August 26th. This date allows prospective vendors just four business days to review the responses, react and prepare an appropriate response to the Office.

Yes, an extension was granted via Addendum 1, which was published on August 22, 2016.

Attachment 1

