

REQUEST FOR QUOTES (“RFQ”) # 2024-005

CUSTOMER SERVICE TRAINING PROGRAM

SCOPE OF WORK

Agency Overview

The New York City Board of Education Retirement System (“BERS”) is an approximately 160-person agency responsible for providing pension services to designated employees of the New York City Department of Education who are not eligible to participate in the New York City Teachers’ Retirement System. In addition, BERS is open to certain other covered employers, such as the New York City School Construction Authority and others. BERS was chartered in 1921 and is one of five municipal pension systems within the City of New York.

BERS has approximately 50,000 active members and over 100,000 unique membership case files. BERS offers both a defined benefit (traditional pension) plan called the Qualified Pension Plan (“QPP”) and a defined contribution plan known as the Tax Deferred Annuity (“TDA”). BERS is responsible for the management and administration of retirement funds and the disbursement of retirement, disability, and death benefits to its members and their designated beneficiaries.

Solicitation Background

The selected vendor will provide customer service training to staff of the Member Communications and Member Services Departments.

In 2018, BERS created a Member Communications Department dedicated to supporting BERS members. The Member Communications Department is overseen by two (2) managers and is comprised of the following divisions:

- **Call Center**, which handles inbound calls, and is currently comprised of fourteen (14) employees and one (1) Call Center supervisor.
- **Member Communications Unit (“MCU”)**, which is responsible for managing secure messages received via the Member Self-Service Portal (“MSS”)¹, chats received via BERS’ website, and email. MCU is currently comprised of five (5) employees and one (1) MCU Supervisor.
- **Outreach**, which interacts with current and prospective members to provide information through seminars or through BERS’ website. Outreach also manages the design and language of BERS’ website. Outreach is currently comprised of two (2) employees.

The Member Services Department is a long-standing department within BERS that provides counseling, reception, and enrollment services to BERS members. The Member Services

¹ MSS is a web-based portal where members can request services, such as, loans, Tax Deferred Account (“TDA”) changes, retirement account estimations, etc.

Department is overseen by two (2) managers. The Reception Team greets visitors and addresses in-person queries from members and retirees. In addition, the Reception Team answers a variety of questions and may guide members in completing forms, helping members to apply for a loan, designate a beneficiary, etc., before escalating matters to a retirement counselor for further assistance. The four (4) staff that comprise the Reception Team are supervised by the Deputy Director of Member Services.

For the purposes of this solicitation, customer service training will be delivered to the Reception Team (not the entire Member Services Department) as well as the Member Communications Department. BERS requires a comprehensive Customer Service Training Program (“Training” or “Training Program”) that emphasizes the fundamentals of excellent customer service and fosters management development. The target audience for the Training Program is approximately thirty-one (31) employees. Written materials must be provided as part of the Training Program and should provide guidance to future staff. Additionally, the Training Program must give supervisors and managers the management and coaching skills needed to increase employee accountability, reinforce new customer service standards, and build supportive and trusting relationships within the team.

The vendor providing the Training Program must be experienced with the relevant customer service industry standards and best practices for successful communication and consistency of service.

Objectives

The overarching goal of the Training Program is to establish an effective communication program that informs, educates, and builds trust and a positive reputation with BERS members. In addition, the Training Program must provide tools to meet the following division-specific goals:

Call Center:

- Provide the call center staff with confidence building, de-escalation strategies, and refining overall communication skills needed in a customer service position.
- **MCU:** Refine basic customer service skills (ex: empathy, email etiquette, active listening, etc.), and de-escalation strategies.
- **Outreach:** Build and refine presentation skills, build staff confidence, refine networking and collaboration skills.
- **Reception:** Continue to improve effective communication skills that informs, educates, and builds trust among members. This will assist in improving the overall member experience.
- **Management:** Training must be focused on coaching and building staff, delivering feedback, and measuring and assessing the skill sets developed through this Training Program.

Requirements

The Training Program must be tailored based on the nature of the different tasks performed by the divisions and the objectives, as specified above.

The Customer Service Training Program must:

- Improve the Member Communications Department and Reception Team's soft skills of effective communication, conflict resolution, problem solving, research, and adaptability by reviewing, defining, and developing techniques and standards to be met across all forms of communication.
- Include training on email and telephone etiquette, including greeting techniques and the importance of tone in all interactions.
- Include training in active listening and effective questioning techniques.
- Foster personal accountability among the staff.
- Include training on positive communication, the use of empathy, and emotional intelligence.
- Include strategies to strengthen and boost staff confidence when dealing with difficult members and situations, including conflict resolution and tone calibration techniques.
- Supply techniques to decrease telephone wait times and decrease the call abandonment rate.
- Include training on how to approach every member interaction with the highest level of performance, with purpose and intention.
- Include an analysis of communication strengths and weaknesses via the DiSC assessment tool to build customer service skills for 25 employees.
- Provide managers and supervisors with the necessary tools and techniques to coach and guide progress.

Implementation

The Training Program sessions must be live, online sessions via Microsoft Teams, Zoom, Webex, or a similar BERS-approved program. BERS is also interested in obtaining pricing for in-person training. Prospective vendors should provide pricing for the Training Program for both options: 1) live online session; and 2) in-person training at BERS offices located at 55 Water Street New York, NY.

The budget allocated for the Training Program is \$45,000 USD which is a maximum, not-to-exceed amount. The development, execution, and implementation of the Training Program must be within the allocated budget without diminishing or compromising the integrity of the Training Program's objectives and requirements.

BERS' unique customer interactions and scenarios in a public pension context must be considered and reflected during the Training, using case study examples for each group. Pre-Training discussions with the Member Communications and Member Services Departments are necessary to gather background information and understand the Departments' business-specific needs. Pre-training should not last longer than four (4) weeks and must be completed by June 30, 2024.

The Training Program schedule must accommodate Call Center availability and be approved in advance by the Member Communications Department.

The Training Program sessions must take place in phases, as follows:

- During Phase 1, the vendor will work with the Member Communications divisions and Reception Team to introduce essential customer service standards over a period not to exceed two (2) months.
- After the completion of Phase 1, the Member Communications divisions and Reception Team will independently apply the skills learned during the Phase 1 Training over a period not to exceed three (3) months.
- The vendor will then return to BERS for Phase 2 Training over a period not to exceed one (1) month. The content provided must build on Phase 1 Training and include more sophisticated and complex examples, in addition to coaching, and mentoring skills for supervisors.
- During Phase 2 of the Training Program, the vendor must assess the effectiveness of Phase 1 and its implementation by BERS staff, and address as well as incorporate any needed improvements on Phase 2 of the Training Program.

Additionally, the vendor is responsible for providing the following materials:

- Printed materials, such as workbooks and PDFs, to facilitate the Training Program. The printed materials must be comprehensive enough to train new hires on the Reception Team and in the Member Communications Department.
- Materials for communication and marketing support of the Training Program, including teasers, launch emails and any other communications around the startup of the Training Program.

Assessments and Reporting

Throughout the Customer Service Training Program, the vendor will perform multiple assessments. Pre-Training assessment must be performed to understand the breadth of staff knowledge and to identify gaps in performance. During the Training Program, the vendor must perform assessments to gauge staff progress. Finally, the vendor must perform an assessment upon completion of the Training Program to get an understanding of the effectiveness of the Training Program. Reports of all results must be submitted to the Member Communications and Member Services Department heads.

The vendor must work with Member Communications and Member Services management to create an assessment they can use between Phase 1 and Phase 2 of the Training Program and following Phase 2 of the Training Program, so that changes in performance can be tracked.

Additionally, the vendor must track participation information, attendance, interaction, and engagement per trainee in a written report submitted to the Member Communications and Member Services management at the end of each Phase.

Contract Term

The services must be provided within 10 months of the contract's start date. Training Sessions are anticipated to begin as follows: Pre-training, on or about June 2024, Phase 1, on or about October

2024 and Phase 2, on or about March 2025. BERS shall have sole discretion to terminate the contract at any time for convenience upon thirty (30) days' prior written notice to the vendor.

Invoice and Payments

Vendor should provide an invoice to BERS following completion of each milestone (pre-training, Phase 1, Phase 2, etc.). Payment will be made in arrears within 30 days of receiving an invoice. Final payment will be furnished upon completion of all training and reporting.

Responses

Please complete the pricing form and submit to BERSProcurement@bers.nyc.gov by **5PM EST** on **Wednesday May 29, 2024**.

Evaluation

Responses will be evaluated based on the program approach/plan and cost proposal that is the best value to BERS.

[END OF DOCUMENT]