

District of Columbia Retirement Board (DCRB)

Request for Proposals for Employee Training

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900 7th Street, N.W. Second Floor, Washington, DC 20001

**District of Columbia Retirement Board
Request for Proposals for Employee Training Services**

Executive Summary
(Please Limit Response to One Page)

Firm Name: _____

Address: _____

Telephone
Number: _____

Contact
Person: _____

Email: _____

Training
Team: _____

Why should the District of Columbia Retirement Board retain your firm to provide employee training services? Please summarize your firm’s strengths in the space provided.

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A. OVERVIEW

The District of Columbia Retirement Board (DCRB), an independent District of Columbia government agency, is a retirement system that manages assets in excess of \$4 billion of the Teachers' Retirement Fund and the Police Officers and Firefighters' Retirement Fund (the "Funds") on an actuarially sound basis and manages retirement and post-employment benefit programs for participants and beneficiaries of those Funds. The DCRB works closely with various external agencies in administering retirement benefits and disbursements, most notably the U.S. Department of Treasury's Office of District of Columbia Pensions (ODCP) in conjunction with the Bureau of Public Debt (BPD).

The agency is comprised of approximately 45 employees that provide services to approximately 24,000 active and retiree plan participants. In recent years, the DCRB has instituted multiple changes, including shifts from manual to automated processes and other changes in staffing and strategic direction. As DCRB continues to evolve, the profile and needs of the customers served by the agency will change, calling for the consistent use of effective customer service, adaptability and interpersonal skills by all members of the staff.

DCRB seeks to provide training to all staff (including managers and senior executives) in an effort to enhance the effectiveness of the agency. DCRB considers ongoing training necessary to meet agency current and future business objectives. While the initial focus for the training is a six-month period, DCRB desires to build on the learning over a longer period of time, potentially lasting years. For right now, DCRB's initial overall objectives for the training effort includes:

Customer Service – This training should assist agency employees in the development of this critical competency and focus on areas such as assisting the customers (both internal and external), listening for facts, asking effective questions, reaching out to customers and being sensitive to their needs, and providing professional responses to their inquiries. Additionally, this training should provide tools for employees handling difficult customers, tactical communication strategies, and creating a customer service culture.

Interpersonal Skill Development – This training should provide employees the opportunity to learn various methods of communication styles, dealing with various stressful situations, and how to foster teambuilding to solve problems. In this training, participants should learn how to define a problem, use and give constructive criticism, have knowledge of the attitude and behaviors necessary to be a skillful listener and add value to another person's ideas to solve problems. Conflict management, influencing skills, and different inter-generational communications and learning styles should also be addressed.

Leading, Supervising, and Managing Others – This leadership and emerging leaders training will focus on creating a high productive workplace by motivating, developing, and coaching employees in support of the overall strategic mission of the organization. This training will also give perspectives on dealing with disciplinary issues, performance feedback, and fostering employee development.

Organizational Change and Creating a High Performance Organizational Culture - This training for all employees should focus on how to deal and cope with organizational change, assist with understanding strategic thinking and leadership, and address issues surrounding barriers to change. This training should also focus on using performance management and metrics to help improved organizational outcomes.

Time Management, Multitasking, and Reaching Goals - This training for all employees should focus on how to develop action plans for better use of time, managing multiple projects and priorities, and reaching daily and long-term goals in a rapidly changing environment. This training should help identify barriers to successful time management, teach and demonstrate the use of technology to assist in time management, demonstrate the elements of successful and productive meetings, explain the benefits and drawbacks of various calendar and project management systems, and explain the use of various resources to meet goals and improve productivity.

Diversity Sensitivity Awareness – This training for all employees should focus on becoming familiar with the concepts of all areas of discrimination (age, gender, sexual orientation, age, disability, etc.) They will be given clear definitions and examples of discrimination, along with guidelines for avoiding and dealing with sensitive situations in the workplace. Employees will also explore the dimensions of diversity, challenge assumptions and raise awareness about the importance of having a set of defined values and principles to work effectively cross culturally. Employees should learn about laws and legislation governing diversity, discrimination, and harassment, as well as the consequences for those involved in violating those laws.

B. Scope of Services

DCRB is seeking a contractor to provide quality customer service and employee development training to up to 45 employees in onsite group training sessions. It is desired that the training for each session should be able to cover the topic within one work day or less. DCRB envisions that to cover all 45 employees, the following number of classes should be offered:

1. **Customer Service:** All employees, 3 sessions to be scheduled onsite
2. **Interpersonal Skill Development:** All employees, 3 sessions to be scheduled onsite
3. **Leading, Supervising, and Managing Others:** 15 employees, 1 session onsite
4. **Organizational Change and Creating a High Performance Organizational Culture** – All employees, 3 sessions to be scheduled onsite

5. **Time Management, Multitasking, and Reaching Goals** -All employees, 3 sessions to be scheduled onsite
6. **Diversity Sensitivity Awareness** - All employees, 3 sessions to be scheduled onsite

C. Minimum Qualifications and Proposal Requirements

Proposals should be as succinct as possible while providing an accurate picture of the firm's ability to meet the needs of DCRB in a thorough, accurate, responsive and cost-effective manner. Each proposal must contain the following elements:

Transmittal Letter and Minimum Qualifications

Within the transmittal letter, the proposing firm must include the following:

- 1) The history of your organization in terms of the type of training services provided. Include the description of services, volume of services, recent client reference list (from past 2 years, minimum of 4 clients) and attached client evaluations. In relation to each client listed as a reference, provide: a) the contact name, b) phone number, c) the number of participants trained, and d) the content of programs administered.
- 2) Your organization's specific ability to provide this employee training service to DCRB. Outline your organization's ability to tailor instruction and materials to the specific needs of this RFP.

Understanding of the Services Needed

In this section, describe your understanding of the services covered by this RFP. Please provide DCRB with information, not exceeding four pages, regarding your approach and methodology to the scope of work outlined in the RFP.

Professional Staff

In this section, describe the experience of the individuals who will be assigned to the DCRB account. Provide a resume for each member of your organization who may provide training. Document specifically any and all training provided in a transitional organization, governmental entity, and with diverse personnel.

Firm History and Operations

Please address the following questions regarding your firm:

1. How many years has the firm been providing training services?
2. Please identify the location of the primary office that will provide services for DCRB.
3. Describe the ownership structure of the firm, including the relationships of each branch office to the branch offices and to the headquarters. Identify the individual who has overall responsibility for the firm's operations. Please disclose any conflicts of interest that may exist in performing services to DCRB.

References

List three public employee clients for whom the firm has provided professional training services within the past two years. For each reference listed, include client name, address, and telephone number and name of a contact person. Please state those clients who have worked with the specific trainers who will be assigned DCRB as a client.

D. Fees for Services

The DCRB requests that the fees for service be estimated on a per session basis inclusive of content development, attendance sheets and evaluations, course evaluation summaries, training certificates, and all other travel, lodging, meals and related expenses. Please describe your fees, proposed delivered content, and work samples/outlines of each course.

E. Submission of Proposals

Bidders should submit their proposals to:

Mailing and Delivery Address

Daniel Hernandez
District of Columbia Retirement Board
900 7th Street, NW
Second Floor
Washington, DC 20001

Proposals must be received by:

June 5, 2010
5 p.m., EST

No exceptions to this deadline will be allowed unless DCRB extends the deadline whereupon it will notify recipients of the RFP. The firm's response to this RFP shall be no more than 15 pages (exclusive of exhibits). You should submit three (3) copies of your proposal in a sealed package. Please mark on the outside of your package:

District of Columbia Retirement Board
RFP for Employee Training Services

Submission of proposals or any portion thereof via fax shall not be accepted. Any firm that wishes to correct, amend or supplement their proposal must do so prior to the filing deadline and must do so by withdrawing its proposal in its entirety and submitting a complete, corrected proposal package. Modification in any other manner will not be accepted.

Proposals become the property of DCRB upon submission and will not be returned. All cost for developing proposals is entirely the responsibility of the firm and shall not be chargeable to DCRB. DCRB accepts no responsibility for lost or late delivery of proposals.

Questions

Questions about the Request for Proposals must be submitted in writing by email to daniel.hernandez@dc.gov or by fax at (202) 566-5000, Attention: Daniel Hernandez.

F. Evaluation Criteria

Only proposals that meet the Minimum Qualifications will be evaluated. The evaluations will take place in two phases. Phase One will involve review of written proposals. Phase Two may involve interviews with representatives of DCRB that will make the final selection. In both phases of the selection process, firms will be evaluated using the following criteria.

Criteria	Percentage
Firm understanding of training needs and descriptions of courses offered	15%
Firm past performance conducting similar training	10%
Firm methodology and training plan	25%
Professional staff	10%
Fees for services	40%

G. DCRB Schedule of Events

RFP Released: May 19, 2010

Proposals Due: June 5, 2010

H. Miscellaneous Provisions

The DCRB reserves the right to cancel this RFP at any time and to reject any and all proposals submitted in response to this RFP, if the DCRB determines such action or actions to be in the best interest of DCRB.

DCRB also reserves the right to request clarification of any submission, modify or alter the Scope of Services and solicit new submissions, reject any or all submissions, and waive immaterial irregularities in any submission. **DCRB does not intend to entertain limited liability clauses of any type with the vendor selected.**

During contract formation, if DCRB or its agent is unable to agree to contract terms with the candidate receiving the highest evaluation in this RFP process, DCRB reserves the right to terminate contract negotiations with that candidate. In the event of such an impasse, DCRB may contract with the candidate receiving the next highest evaluation.