



**TRAINING CONSULTANT SERVICES
(RTM RFQ 24-001)**

SCOPE OF SERVICES

The City of Phoenix Employees' Retirement System (COPERS) is dedicated to administering a retirement plan for past, current, and future City of Phoenix employees that prudently invests plan assets and delivers comprehensive support to meet the needs of COPERS' members and their beneficiaries. COPERS is a single employer, defined benefit pension plan established by the City Charter. Its purpose is to provide retirement, disability retirement and survivor benefits for its members. The general administration, management and operation of COPERS are vested in a nine-member Retirement Board.

COPERS is seeking two services under this request. (Proposers may respond to one or both of the below sections.)

A. A review of existing training materials and report of suggested improvements and enhancements. COPERS currently conducts four trainings:

- 1) New Employee Orientation – instructor led, 45 minutes
- 2) Understanding Your Pension – instructor led, 4 hours
- 3) Retirement Master Class¹ (3-5 years from retirement) – multi-instructor led, 8 hours
- 4) Retirement Master Class (1-2 years from retirement) – multi-instructor led, 8 hours

B. Provide a project plan to include on-site and/or web-based instructor-led employee development training about the Retirement Plan and the benefits available to members. The training sought under this agreement shall be short courses (e.g. one to two hour) with no more than six scheduled instructor-led courses per quarter.

- 1) Training Delivery: Training services can encompass a variety of training formats and deliverables as described below.
 - a. Classroom – Offered in a short course instructor led training format.

¹ All Retirement Master Class sessions included presentations by COPERS (2 hours), Galloway Public Safety Financial (1 hour) for public safety members only, City of Phoenix Human Resources Benefits Division (1.25 hours), Nationwide Retirement solutions (1.50 hours), Social Security Administration (1.50 hours).

- b. Blended learning – Combining face-to-face classroom methods with e-learning activities to form an integrated instructional approach.
- c. Online – Delivered through a web browser or mobile device to be conveniently accessed anytime and anyplace.

2) Curriculum

- a. Successful proposer(s) shall tailor the course content to the appropriate audience, as outlined above.
- b. Successful proposer(s) must identify expected outcomes of the class, which will enable the participant to utilize his/her learning in making informed benefit decisions.
- c. Successful proposer(s) must have their own training content, provide trainers who are certified to train on 3rd party content, and/or be willing to create content based on the needs of the organization without charging fees for curriculum design.
- d. Successful proposer(s) should have the ability to customize training curricula to fit public sector vocabulary as well as customization based on feedback from employee evaluations and Retirement Board members and staff.
- e. On-Site courses, not requiring computer access, shall be performed for up to 30 employees at a time.
- f. Below are training topics illustrative of the kinds of courses the Retirement Office is seeking, including but not limited to:
 - i. Specific information about the COPERS plan; including, but not limited to:
 - 1. Membership requirements
 - 2. Retirement eligibility
 - 3. Pension estimates/calculations
 - 4. Sick leave conversion
 - 5. Pension applicable payouts
 - 6. Retirement process
 - 7. Working with plan resource providers (Nationwide, PSPRS, Galloway Public Safety Financial, etc.)
 - ii. How the COPERS defined benefit (DB) plan works in coordination with the deferred compensation (DC) plans (457b, 401a, PEHP) to increase retirement readiness.
 - iii. General financial wellness education.

3) Class Scheduling Process

- a. Classes will be scheduled six months at a time as determined by the Retirement Board and staff. All classes will be scheduled in the City of Phoenix' e-learning system PHXYou for tracking purposes.
- b. Successful proposer(s) must be available to schedule employee training classes, in coordination with Retirement staff, during regular business hours (M-F: 8:00 AM – 5:00 PM) at least three (3) months prior to schedule start date.

- c. Classes will be scheduled Monday thru Friday, on different days of the week and at different times to try and encompass employees who work alternative shifts, e.g. second and third shifts.
- 4) Locations
 - a. On-site training will be conducted at a City of Phoenix facility.
- 5) Class Materials Successful proposer(s) shall provide materials for courses. This includes preparing all participant materials (guides, handouts, exercises, books, job aides, etc.) that:
 - a. Provide key content related to the course topics that are current, relevant, and geared towards working public sector professionals.
 - b. If applicable, include a Resource page where participants can obtain additional information on the topic (websites, books, professional associations, blogs, etc.).
 - c. Make certain that no copyright permissions are violated.
 - d. Make use of appropriate audio/visual equipment.
- 6) Trainers/Instructors
 - a. Trainers provided and assigned shall be high quality instructors on a consistent basis to deliver customized training as needed by the Local Board.
 - b. All instructors shall maintain and update each training syllabus, introduce, and follow objectives for each class, complete training as described, and utilize training aids such as the projection system.
 - c. Trainers should have knowledge of and experience with audio/visual equipment and technology.
 - d. Instructor shall demonstrate active listening and facilitation skills, communicate effectively both orally and in writing, and speak effectively before large and small groups.
 - e. Trainers should perform the role of facilitator, and effectively utilize group dynamic skills and techniques.
- 7) Performance Evaluation/Quality Standards Contractor will:
 - a) Immediately provide feedback surveys and attendance records to the City of Phoenix Retirement Department.