

Consulting Services ITQ 80100000-ITQ-65  
State Contract Parent 4400007410  
Request for Quote  
Pennsylvania Treasury  
Call Center Optimization

**I. Statement of the Project**

The Pennsylvania Treasury Department is seeking a vendor to assess and evaluate its current call center operations, benchmark against best practices and recommend approaches and strategies to improve and optimize its operations.

**II. Term of the Project**

The term of the project shall commence upon issuance of a purchase order to the selected consultant (effective date), and is expected to conclude within 3-4 months.

**III. Qualifications**

- A. The selected vendor and its project team must have experience in consulting on call center (preferred experience with financial/investment services and government services) development, implementation or improvement projects and must have access to best practice performance information for purposes of process and financial benchmarking and recommendations.
- B. The consultant must provide detailed examples (3) of projects the consultant has performed that are similar in nature and scope to the services stated in this RFQ. The consultant should provide a narrative for each project that includes the following:
  1. Project name
  2. Scope and size of the project
  3. Results of the project
  4. Project start and end dates
  5. Project references
  6. Client name
  7. Client address
  8. Client contact person and contact information
- C. The consultant must provide the names and resumes, including experience and qualifications of key project team members. The project team leader must have demonstrated project management skills and the team must have technical background and experience in call center operations and improvements. Team member information should not include personal information as this information may become public documents.
- D. If applicable, the consultant shall provide a subcontracting plan for all subcontractors who will be assigned to the project. Subcontractors under this RFQ do not need to be a qualified ITC contractor since the prime contractor assumes responsibility for all services.

#### **IV. Scope of Work**

The consultant shall be responsible for performing the following tasks. The consultant shall describe its approach for accomplishing the tasks.

1. Define, diagnose and analyze the current operation and challenges
  - a. Gather and evaluate baseline performance information on current call center operations
  - b. Gather and evaluate baseline financial cost information on current call center operations
  - c. Assess the use and effectiveness of technology platforms for current call center operations, including opportunities related to expanding online self-service, live chat, voice to text and other features
  - d. Assess the capability and capacity of staff for current call center operations, including training and job aids
2. Benchmark current call center operations against high performing call centers (financial/investment, government and other)
  - a. Identify high performing government or other call centers for benchmarking purposes
  - b. Compare Treasury call center organization, capability and performance against benchmark organizations
  - c. Identify opportunities for improvement for Treasury call centers based on current performance, benchmark comparisons and desired performance levels
3. Make recommendations on improvement options
  - a. Provide Treasury with recommendation options for optimizing its call center operations
  - b. Provide Treasury with recommendation options for ensuring the security of personal information
  - c. Recommended options should include pros, cons, potential return, customer and staff impact, challenges, and costs
  - d. Recommended options should include a general implementation approach, plan and estimated timeline

#### **V. Background**

The Pennsylvania Treasury currently operates three separate and distinct call centers: Savings Programs including ABLE and 529 (BSP), Unclaimed Property (BUP), and Unemployment Compensation (BUCD).

Throughout the pandemic, the BUCD call center has been severely tested and has been supported by the deployment of additional resources from within the Department. Both the BSP and BUP have peak periods where staff resources appear to be strained and performance indicators decline.

Current call center performance information will be available to the consultant. The BUCD call center includes 2 dedicated call center staff plus 2 managers who assist when necessary, the BSP call center includes 6 customer service representatives plus one supervisor, and the BUP call center includes 22 claims examiners with plans to hire 4 more who have combined duties of taking calls and processing claims.

Each call center is supported by a different funding stream and separate departmental management processes and organization.

**VI. Submission**

Responses to this RFQ should be submitted to [RFQ21-001@patreasury.gov](mailto:RFQ21-001@patreasury.gov) by Thursday, June 9, 2022.

Questions regarding this RFQ should be directed to:  
Pam Blanch-Friedrich  
Bureau of Support Services