



## **TEACHERS' RETIREMENT SYSTEM OF THE STATE OF ILLINOIS**

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R. Stanley Rupnik, Interim Executive Director

<http://www.trsil.org>

877-927-5877 (877-9-ASK-TRS)

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### **REQUEST FOR INFORMATION (POSTED MARCH 23, 2021)**

#### **Introduction**

The Teachers' Retirement System of the State of Illinois (TRS) is conducting an information-gathering process to learn more about a Telephone Call-Center software solution with the ability to handle several call-centers simultaneously. With this new software, training as well as an adoption strategy are necessary for successful implementation.

TRS is looking for a solution that is a single pane of glass for administration, support, end-user and manager access. This solution may be a cloud hosted option, or an on-prem solution. We need a greater ability to manage reporting, maintenance, messaging, auditing, recording, and coaching. In order to gather daily metrics, and overall metrics, this information is in several disparate locations. TRS currently has 21 servers, and around 650 total licenses for call center, instant messenger, and voicemail functionality.

This Request for Information (RFI) is for information-gathering purposes and does not obligate TRS to select any particular solution or vendor. TRS reserves the right to take any further action as in its sole discretion is determined to be appropriate, including selecting a solution, issuing a formal solicitation, gathering more information, or not pursuing further or at all.

#### **Summary Description of TRS**

The General Assembly created the Teachers' Retirement System of the State of Illinois (TRS or the System) in 1939. TRS administers a multiple-employer public pension plan to provide its members with retirement, disability, and death benefits. Membership is mandatory for all full-time, part-time, and substitute Illinois public school personnel employed outside the city of Chicago in positions requiring certification by the Illinois State Board of Education. Persons employed at certain state agencies relating to education are also TRS members. The System serves 427,321 members and had \$51.6 billion in assets held in trust for its membership as of June 30, 2020.

The retirement system is administered as a qualified plan under the Internal Revenue Code. TRS benefits and investments are governed by Articles 1, 16, and 20 of the Illinois Pension Code, 40 ILCS 5. Funding comes from member contributions, contributions by

TRS-covered employers, the state of Illinois, and investment income. The System's most recent Comprehensive Annual Financial Report as well as a variety of other information about TRS is available on the TRS Web site at <https://www.trsil.org>.

A fifteen-member Board of Trustees (the Board) is responsible for the general administration of the System, including the duties granted to it under Article 16 of the Illinois Pension Code, 40 ILCS 5/16. Under the direction of the Executive Director employed by the Board, the day-to-day administration of the System is delegated to the System's staff. TRS currently employs approximately 200 employees in two physical locations. The main office is in Springfield, Illinois with an additional location in Lisle, Illinois.

**Respondent's Contact Information:**

Please provide the following contact information with your response.

Name of Vendor		
Mailing address		
City	State	ZIP code
Phone	Fax	
Web site		

Contact Person Name:	Phone:
Title:	Fax:
E-mail:	
Authorized signature:	Date

**Questions**

Please respond to the following questions, restating the question in each response. Please respond to the best of your understanding. TRS is not entertaining any questions about this RFI and you should not initiate any contact with TRS at this time, other than submission of your response.

Questions pertaining to the systems in general:

- 1) Is the solution cloud or on-premise based?
- 2) How is the cost structured?
  - a. On-going annual costs?
- 3) Are there any 3<sup>rd</sup> party requirements?
- 4) What maintenance is required?

- 5) How does your system integrate with Microsoft Office 365, particularly with Outlook and Teams?

Questions or Requirements pertaining to call centers:

- 1) Product needs to be a single pane of glass for reporting, managing messages, viewing history, making reports. (Single integrated system)
- 2) How is call center activity tracked and managed?
  - a. Example of logging in and out during the day for breaks and lunches...
  - b. Is the history retained over logins and outs?
- 3) What is the call center user experience?
- 4) What is the call center employee experience?
- 5) Does the product support Single Sign On?
- 6) What data is captured in the reporting? (inbound/outbound/length of calls, wait times, abandoned calls)
- 7) Does the solution have real-time dashboards for the manager and staff?
  - a. How is it displayed?
  - b. How is the history maintained?
- 8) What tools are available for managers to support remote workers?
- 9) Does the system allow post call surveys?
  - a. How is the data made available?
  - b. How soon?
- 10) Can calls be recorded, if so for how long?
- 11) Can calls be monitored? If so, can managers join the call as needed for coaching/intervention?
- 12) What's the process to change greetings and prompts?
  - a. can manager change?
  - b. How are they created?
- 13) Does the system support temporary greetings and holiday recordings?
- 14) Does the system support caller-id-based identification verification?
- 15) Can the call center voicemail be turned off and on as needed?
- 16) What phones/headsets are compatible with the solution?
- 17) What's the dependability of the solution (e.g. 99.999% ?)
- 18) What are the connectivity requirements for stable and consistent calling?
- 19) Does the software support API calls?
  - a. When a member call comes in, can the system use caller ID or some other identifier to open records in our custom pension administration system?

### **Instructions for Submission of Responses**

Please return your responses and any attachments via email to [Purchasing@trsil.org](mailto:Purchasing@trsil.org). **Responses must be received on or before 2:30 pm on April 13, 2021 to be considered.** Your response will not be accepted unless it is signed and dated.