**Sourcing Event 0000006788**

**Attachment 5**

**Community Engagement and Customer Experience**

* 1. BACKGROUND INFORMATION
1. **General Requirements:** The K2C Program serves approximately 50,000 SFUSD students and their families, with almost 25% of program participants actively engaging with their accounts to save for college. The SFUSD population and their families are highly diverse, may have mixed immigration status, may speak languages other than English in their household, and may have limited or no other formal relationships with financial institutions. Engrained in the K2C Program is a strong commitment to engage with the community, layering on program enhancements to the basic mechanics of K2C to continually position participants for success on their financial path to college. K2C offers incentive programs to encourage savings behaviors among families, uses innovative engagement strategies like bank field trips and community deposit days, and provides college readiness support to students and their families. Every facet of the program prioritizes greater access, increased engagement, and financial inclusion for K2C participants and their families.

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| **Community Engagement and Customer Experience Roles** |
| **K2C Program** | **Financial Institution** |
| * Design and lead all outreach and community engagement efforts for K2C participants and their families
* Lead communications plan and develop materials for K2C participants
* Provide IS platform for K2C participants to engage with their accounts online
* Provide front-line customer service to K2C participants for IS platform issues
 | * Provide customer service to K2C participants making deposits, particularly during in-person interactions
* Provide customer service training for front-line staff interacting with K2C participants
* Support outreach efforts such as deposit days and field trips
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1. **Community Engagement:** The City seeks a Proposer that is willing and energetic about partnering on community engagement efforts, including but not limited to bank field trips and community deposit days.

Desired services include:

* + 1. The Proposer will host 20-50 field trips to Proposer’s place of business for participants and families throughout the school year organized, agreed to in advance, and coordinated by K2C. If Proposer does not have physical locations within San Francisco, will work with K2C program to identify other field trip concept to encourage and excite participants about making deposits and saving.
		2. The Proposer may support deposit days at community locations outside of the Proposer’s place of business, like schools. Facilitation of deposits at community locations may include but is not limited to accepting deposits onsite and supporting transit of deposits after an event.
		3. The Proposer will accept and process bulk deposits made on behalf of a group of participants following a deposit day event at community locations, like schools or City Hall. This involves collection of small dollar cash or check deposits received from the students, which are received during the event and deposited with the Proposer as a bulk deposit, including instructions for assignment of participant funds to respective participant accounts. Proposer will subsequently process bulk deposit by assigning participant funds to the appropriate participant accounts.
1. **Customer Experience:** The City seeks a Proposer with a strong commitment to ensuring a high and consistent standard of customer service. Although K2C families may not be account holders with the institution outside of their participant account, they should be consistently provided with a level of customer service commensurate with all other customers of the Proposer. This includes but is not limited to providing a smooth and barrier-free deposit experience for participants and their families.

Desired services include:

1. Providing customer service to K2C families and participants, such as providing account numbers to families at branches or other deposit locations, as necessary, and confirming deposits made to participant accounts, through option of providing a receipt for transaction.
2. Supporting K2C’s customer service by working with program staff in a timely manner to resolve customer issues and provide K2C information required to confirm deposits made to participant accounts, resolve deposit discrepancies, and track customer service issues.
3. Provide training and support to financial institution staff, particularly front-line customer facing functions, to ensure a high and consistent standard of customer service to K2C families and participants.
	1. REQUESTED INFORMATION (up to 3 pages)
4. **Community Engagement**
	* 1. Describe the firm’s ability to partner with K2C on community engagement requirements.
		2. OPTIONAL: Share any additional enhancements or integrations to K2C’s community engagement requirements which the firm could provide beyond core requirements.
5. **Customer Experience**
6. Describe the firm’s plan for customer service to provide K2C participants and families with a high and consistent standard of customer service, including reductions in potential barriers to access for historically disadvantaged and unbanked families.
7. Describe the firm’s language access plan to meet the needs of customers with Limited English Proficiency (LEP).
8. Share training (and retraining) protocols the firm will employ for front-line staff to best serve K2C participants and families.