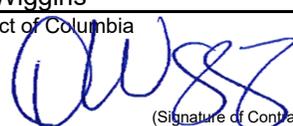


AMENDMENT OF SOLICITATION / MODIFICATION OF CONTRACT		1. Solicitation Number CFOPD-22-R-014		Page of Pages 1 Attachments	
		2. Amendment/Modification Number Amendment No. 2	3. Effective Date See Box 16C	4. Requisition/Purchase Request No.	5. Solicitation Caption Overflow Call Center
6. Issued by: Office of the Chief Financial Officer Office of Contracts 1100 4 th Street SW Suite E610 Washington, DC 20024		Code	7. Administered by (If other than line 6)		
8. Name and Address of Contractor (No. street, city, county, state and zip code) ALL POTENTIAL OFFERORS Code Facility		X	9A. Amendment of Solicitation No. CFOPD-22-R-014		
			9B. Dated (See Item 11) December 20, 2021		
			10A. Modification of Contract/Order No.		
			10B. Dated (See Item 13)		
11. THIS ITEM ONLY APPLIES TO AMENDMENTS OF SOLICITATIONS					
<input checked="" type="checkbox"/> The above numbered solicitation is amended as set forth in item 14. The hour and date specified for receipt of Offers <input checked="" type="checkbox"/> is extended. <input type="checkbox"/> is not extended. Offers must acknowledge receipt of this amendment prior to the hour and date specified in the solicitation or as amended, by one of the following methods: (a) By completing Items 8 and 15, and returning a <u>1</u> written copy of the amendment; (b) By acknowledging receipt of this amendment on each copy of the offer submitted; or (c) BY separate letter or fax which includes a reference to the solicitation and amendment number. FAILURE OF YOUR ACKNOWLEDGMENT TO BE RECEIVED AT THE PLACE DESIGNATED FOR THE RECEIPT OF OFFERS PRIOR TO THE HOUR AND DATE SPECIFIED MAY RESULT IN REJECTION OF YOUR OFFER. If by virtue of this amendment you desire to change an offer already submitted, such may be made by letter or fax, provided each letter or telegram makes reference to the solicitation and this amendment, and is received prior to the opening hour and date specified.					
12. Accounting and Appropriation Data (If Required)					
13. THIS ITEM APPLIES ONLY TO MODIFICATIONS OF CONTRACTS/ORDERS , IT MODIFIES THE CONTRACT/ORDER NO. AS DESCRIBED IN ITEM 14					
A. This change order is issued pursuant to (Specify Authority):					
B. The above numbered contract/order is modified to reflect the administrative changes.					
C. This supplemental agreement is entered into pursuant to authority of:					
D. Other (Specify type of modification and authority) Administrative					
E. IMPORTANT: Contractor <input type="checkbox"/> is not <input type="checkbox"/> is required to sign this document and return 1 copy to the issuing office.					
14. Description of Amendment/Modification (Organized by UCF Section headings, including solicitation/contract subject matter where feasible.) The above referenced solicitation to provide an Overflow Call Center is hereby amended to reflect the inquires received (Attachment A) and response to inquiries received (Attachment B). ALL OTHER TERMS AND CONDITIONS REMAIN UNCHANGED					
Except as provided herein, all terms and conditions of the document is referenced in Item 9A or 10A remain unchanged and in full force and effect.					
15A. Name and Title of Signer (Type or print)			16A. Name of Contracting Officer		
			Drakus Wiggins		
15B. Name of Contractor (Signature of person authorized to sign)		15C. Date Signed	16B. District of Columbia  (Signature of Contracting Officer)		16C. Date Signed 02/03/2022

Attachment A

The following changes are hereby incorporated into the solicitation.

1. Section L.2 is hereby amended to extend the deadline for inquiries to **February 17, 2022, at 2:00pm (EST)**.
2. Section H.3.12 is hereby amended to extend the deadline for requests for waiver of the certified business enterprise (CBE) subcontracting requirements to **February 17, 2022, at 2:00pm (EST)**.
3. The proposal due date is hereby extended to **March 17, 2022, at 2:00pm (EST)**.
4. Section C.3.4 is hereby amended as follows to revise the section to require noise-canceling headset with a USB port and a high-speed internet connection:

C.3.4 The Contractor shall provide a full-service operation to include, but not limited to, staffing, facilities, equipment that includes noise-canceling telephone headsets with a USB port, staff training, setup, testing, and access to a high-speed internet connection for each CSR.
5. Section C.3.7 is hereby amended to make a change to Section C.3.7.5 to remove reference to contractor disposal of equipment and add Section C.3.7.6 to incorporate provision for the contractor to be responsible for returning equipment to the District:

C.3.7.5 The Contractor shall track, receive, and maintain an inventory record of equipment provided to the Contractor by the OCFO. The Contractor must provide the TSG, biannually, hardware inventory reports and records of OCFO provided equipment.

C.3.7.6 The Contractor shall return OCFO provided equipment when the equipment is ready for disposal, when equipment is no longer needed by the Contractor, or when the return of equipment is requested by the OCFO. The District will pay for shipping costs of sending equipment to the Contractor. The Contractor shall be responsible for all packaging and shipping costs to return equipment back to the OCFO. The Contractor shall pack and ship equipment in the same method and manner as the equipment was received by the Contractor from the District.

6. Section C.3.15 is hereby replaced as follows to add in the minimum 30-day turnaround requirement:

C.3.15 The Contractor shall, at the written request of the COTR, provide the following call center service information no later than 30 calendar days from the request, unless otherwise extended by the COTR:

1. Personnel dedicated to the Contract
2. Inbound live operator services information and directives disseminated to dedicated personnel
3. Services and equipment dissemination plans
4. Scripted information dissemination plans
5. Data entry of information into the OTR and Contractor databases
6. Staffing plan
7. Training plan
8. System troubleshooting plan
9. Performance standard implementation plan
10. Performance standard failure remediation plan
11. Transition in and out plans
12. Reporting procedures

7. Section C.3.19 is hereby added to incorporate OTR's required go-live timeframe:

C.3.19 The Contractor shall fully transition into answering all calls transferred to the Contractor no later than five (5) business days after the completion of the OTR initial trainings.

8. Section C.4.1.0 is hereby replaced as follows to revise the background check requirements:

C.4.1.0 The Contractor shall institute hiring and screening practices for all CSRs. The Contractor shall obtain a criminal history check as required by IRS Pub. 1075, Background Investigation Minimum Requirements from an appropriate law enforcement agency. A background investigation shall be conducted for any individual granted access to Federal Tax Information (FTI) and must include FBI fingerprinting (FD-258) which allows the agency to check the applicant's criminal history in all 50 states. The Contractor shall ensure that all background investigations are completed, provided to the OCFO, and approved by the OCFO prior to any Contractor personnel viewing or accessing information obtained from the OTR under this Contract. This requirement also extends to any new, substitute, contract or temporary Contractor personnel who may view or access information obtained from the OTR.

9. Section C.4.1.3 is hereby replaced as follows to clarify the customer service training:

C.4.1.3 The Contractor shall provide the CSR with general basic customer service training using industry standards and customer service instruction. A description of the separate OTR specific training can be found in Section C.6.

10. Section C.4.2.8 is hereby added to incorporate the requirement for meeting participation:

C.4.2.8 The Contractor shall provide leadership staff to participate in daily meetings via Microsoft TEAMS with CSA staff to discuss business trends, issues or other relevant information affecting daily operations.

11. Section C.6.2.1 is hereby replaced as follows to clarify the customer service training:

1. Tax and Revenue Customer Service Training

12. Section C.5 is amended as follows to add the performance standard for transfers, second calls and return calls under Section C.5.0 and to adjust the measures and metrics for the contractor accordingly in Section C.5.1:

C.5.0.8 75% of calls shall be resolved without a transfer, second call or a return call.

C.5.0.9 The Contractor shall evaluate no less than weekly the sufficiency of the number of active CSRs and staff schedules to ensure maximum coverage and efficiency. The Contractor shall have the ability to increase service capacity as needed to ensure performance SLRs are achieved. Additionally, the Contractor shall be able to adjust staffing levels at the same rate as business grow.

C.5.1 The COTR will monthly report and monitor performance under the Contract and measure the Contractor against the performance standards of Section C.5.0.1-C.5.0.8. Calculations shall be based in the month the performance is completed.

C.5.1.1 These required performance standards produce eight metrics each month.

C.5.1.2 Each month, if the Contractor fails to meet the eight metrics for the month, the Contractor shall reduce its invoice for the month as follows:

Number of Metrics that Met Performance Standard in the Month	Reduction of the Invoice for the Month
8	0%
7	10%
5-6	25%
4-3	50%
2-1	75%
0	100%

13. Section C.8 is hereby deleted in its entirety.

14. Section L.3.2.3.I.a, Technical Approach and Methodology is amended to add subsection 3 for draft of plans to be presented in the Offeror's technical proposal:

3. Detailed drafts of the Offeror's equipment dissemination plan, staffing plan, training plan, system troubleshooting plan, and transition in and out plan that will be provided in accordance with Section C.3.15.

Attachment B

The following are responses to inquiries received.

- Question 1. What is the date by which you will answer these questions?
- Response 1. The District responses to vendor questions are published as early as all responses are available.
- Question 2. Why is the contract out to bid at this time?
- Response 2. The OTR Customer Service Administration (CSA) has a recurring need for support to meet the demands of increased call volumes during usual and high-volume events especially during tax return processing and real property tax billing periods. The District is seeking an Overflow Call Center vendor that can provide experienced call center staffing to assist in providing year-round telephone support to CSA, through its existing Aspect Telephony System.
- Question 3. Are bidders permitted to deviate in any way from any manner of quoting fees you may be expecting? For example, if there is a pricing page in the RFP, can bidders submit an alternate fee structure? If there is no pricing page in the RFP, do you have any preference for how bidders should quote fees or can bidders create their own pricing categories?
- Response 3. Offerors should not deviate from Section L.3.3, Price Proposal, which states that the Offeror's Price Proposal shall be submitted as, among other documents, (i) Cover page narrative that describes the budget methodology and detail cost factors and (ii) Completed Section B, Pricing Schedule. Specifically, Section B.5 should be filled out and submitted. Failure to submit pricing as such may result in the proposal being non-responsive in accordance with the Section L.1.2.
- If a prospective offeror has alternatives it wishes to present to the District, is should do so per Section L.2. See Attachment A, Item 1 for the amended deadline for inquiries.
- Question 4. Please reconfirm the due date for the procurement by providing it in the response to answer to questions.
- Response 4. See Attachment A, Item 3 for the amended proposal due date.
- Question 5. Please describe your level of satisfaction with your current or recent vendor(s) for the same purchasing activity, if applicable.
- Response 5. Not applicable. The OTR does not have an Overflow Call Center contract.
- Question 6. Has the current contract gone full term?

Response 6. Not applicable.

Question 7. Have all options to extend the current contract been exercised?

Response 7. Not applicable.

Question 8. Who is the incumbent, and how long has the incumbent been providing the requested services?

Response 8. Not applicable.

Question 9. To what extent will the location of the bidder's proposed location or headquarters have a bearing on any award?

Response 9. In accordance with Section C.3.1, all Call Center services performed, including management, employees, and subcontractors work under this contract, shall be within the continental borders of the United States. The RFP does not mandate further location requirements.

Question 10. How are fees currently being billed by any incumbent(s), by category, and at what rates?

Response 10. Not applicable.

Question 11. How are fees currently being billed by any incumbent(s), by category, and at what rates?

Response 11. Not applicable.

Question 12. What estimated or actual dollars were paid last year, last month, or last quarter to any incumbent(s)?

Response 12. Not applicable.

Question 13. Is previous experience with any specific customer information systems, phone systems, or software required?

Response 13. No previous experience on a specific system or with any specific software is required. The OTR will provide training on the Aspect Unified IP ACD system and the Modernized Integrated Tax system.

Question 14. What is the minimum required total call capacity?

Response 14. The minimum annual projection of overflow calls during the period January through May is 1,000 calls a week and for the period June through December, 750 calls a week.

Question 15. What is the minimum simultaneous inbound call capacity?

Response 15. The minimum simultaneously inbound call capacity is estimated to be 230,000 calls annually.

Question 16. What percentage of inbound calls must be answered by a live operator?

Response 16. The IVR will direct call placements and 100% of directed calls to the overflow call center contractor must be answered by live operators.

Question 17. What percentage of calls must be resolved without a transfer, second call, or a return call?

Response 17. 75% of calls shall be resolved without a transfer, second call or a return call. See Attachment A, Item 12.

Question 18. Is there a minimum or maximum number of operators and supervisors?

Response 18. There is no minimum or maximum number of operators and supervisors stated in the RFP. The contractor shall provide a sufficient number of operators and supervisors proportional to meet the contract requirements, especially the Service Level Requirements (C.5).

Question 19. What is the required degree of dedication for the call center?

Response 19. The contractor shall ensure that the dedication of the call center to the contract is sufficient to meet the contract requirements, especially the Customer Service Personnel Requirements (C.4).

Question 20. What is the required degree of dedication for the operators?

Response 20. The contractor shall ensure that the dedication of the operators to the contract is sufficient to meet the contract requirements, especially the Service Level Requirements (C.5).

Question 21. Are callers required or allowed to connect with a message verification system or pre-recorded message before connecting to a live operator, or must a live operator be the initial contact?

Response 21. There is a pre-recorded message before connecting with a live operator. The OCFO currently operates an Aspect IVR and Unified IP ACD. Please see section C.2.2 (2) and (3).

Question 22. Are callers required or allowed to connect with a message verification system or pre-recorded message before connecting to a live operator, or must a live operator be the initial contact?

Response 22. There is a pre-recorded message before connecting with a live operator. The OCFO currently operates an Aspect IVR and Unified IP ACD. See Section C.2.2 (2) and (3).

Question 23. What are the recording requirements for inbound and outbound phone calls and how long must recordings be maintained?

Response 23. The OCFO will maintain call recordings for both inbound and outbound calls for 3 years. The OCFO controls all the recordings. The contract may request access to the recordings as needed.

Question 24. What are the recording and storage requirements for non-phone communications?

Response 24. The contractor is ONLY responsible for inbound calls and follow-up communications, via telephone. The contractor is Not responsible for written communications.

Question 25. What is the current number of seats for operators and supervisors at your existing call center?

Response 25. The OTR CSA has 64 individual cubicles available for operators and 7 supervisor positions.

Question 26. What is the current average wait time for phone calls?

Response 26. The OTR CSA average wait time is: Peak Season, February 14 through July 3rd: 1 hour, 4 minutes 36 seconds; Non-Peak, October 1 through February 13th and July 4th through September 30: 30 minutes and 33 seconds.

Question 27. What is the current average handle time for phone calls and other types of communications?

Response 27. The current average wait time for phone calls is: Peak Season: 8 minutes and 23 seconds. Non-peak: 8 minutes 52 seconds. All other communications must be directed to the OTR to handle.

Question 28. What is the current average after-call work time for operators?

Response 28. The current average after-call work time (wrap time) for OTR CSA operators is two minutes.

Question 29. Over the past year, what is the percentage of calls received in English versus non-English?

Response 29. English – 98%, Non-English – 2%.

Question 30. Over the past year, what percentage of calls received were in Spanish?

Response 30. 2% of total calls.

Question 31. What time of day, days of the week, or times of the year do calls typically peak?

Response 31. Calls typically peak on Mondays, the lunch hour period between noon and 2:00 pm, during tax season (January to May), and the day after the holidays.

Question 32. Copy of awarded contract, Bid Tab or Award for Current or Incumbent Contractor (if available or if this is the first time that your agency has procured it)

Response 32. Not applicable. The OTR does not have an Overflow Call Center contract.

Question 33. Is this work being outsourced today?

Response 33. No, this work is not currently outsourced.

Question 34. Can you disclose who the current supplier is?

Response 34. Not applicable.

Question 35. How many suppliers are currently servicing the contract?

Response 35. Not applicable.

Question 36. Can you provide us with a copy of the contract? If not, can you direct us to a copy of where we can locate the contract?

Response 36. Not applicable.

Question 37. What was the length of last contract?

Response 37. Not applicable.

Question 38. What was the length of last contract?

Response 38. Not applicable.

Question 39. Was a contract extension used?

Response 39. Not applicable.

Question 40. Will there be a notification for short-list and if so, what is the anticipated timeline?

Response 40. In accordance with Section M.1.4, after evaluation of the proposals the Contracting Officer may elect to proceed with any method of negotiations, discussions or award of the contract without negotiations. At this time, no anticipated timeline is determined.

Question 41. What is the timeline for notification of award?

Response 41. As of to date, the District anticipate tentative award June 2022.

Question 42. What is the go-live date?

Response 42. The Go-Live date for answering all calls transfers to the contractor is five (5) business days after the completion of the OTR sponsored trainings. All DC equipment will have been delivered and tested to work before OTR sponsored trainings. See Attachment A, Item 7.

Question 43. Can you provide average monthly overflow volumes and service levels?

Response 43. The OTR does not currently have an overflow service.

Question 44. Can you provide historical daily overflow call volumes by intervals?

Response 44. The OTR does not have an overflow service.

Question 45. Can you provide historical overflow call volumes for an indicative week and seasonal fluctuations?

Response 45. The OTR does not have an overflow service.

Question 46. How many FTEs currently service the program?

Response 46. The OTR does not have an overflow service.

Question 47. What is the language requirement for the program?

Response 47. English. Also refer to Section C.3.11.

Question 48. How long is the new hire training?

Response 48. Initial training per Section C.6.2 will be up to six (6) weeks virtually, using Microsoft TEAMS.

Question 49. After new hire training, is there a period of nesting where the agents are taking calls in a classroom environment? If so, for how long?

Response 49. No. Training provides an opportunity for the trainee to listen in on live calls and the ability to view live screen functions.

Question 50. Are there expected ongoing training requirements? If so, please define.

Response 50. Yes, refer to Section C.6.5.

Question 51. Does the District require dedicated trainers and/or training managers?

Response 51. Yes, refer to Section C.6.3.

Question 52. What is the expected Average Handle Time for overflow calls?

Response 52. The OTR does not currently monitor call handle time. OTR expects the contractor to provide a quality and complete call experience to customers.

Question 53. Can you provide more detail around your Quality Assurance expectations? (e.g. number of monitors per agent per week, quality assurance processes, quality scorecards, etc.)?

Response 53. Specialists should demonstrate professionalism, integrity, information accuracy and superior customer relations that supports the OTR mission and values.

Specialists should educate customers to help themselves by utilizing mytax.dc.gov and other self-help technology.

A scorecard is completed during call monitoring and review to identify calls that meet or fail to meet quality standards. Calls are reviewed to ensure information accuracy and compliance, which supports a superior customer experience; to include account notation. In addition, it's a critical component of measuring specialists' performance and service levels.

Question 54. How is CSAT measured/calculated today?

Response 54. Customer satisfaction feedback is collected via Customer Surveys (after-submission survey, mytax.dc.gov customer service homepage survey and the CFO internet survey) and internal, external and social media feedback including other government agencies feedback.

Question 55. What are the system requirements? Will it be hosted by the supplier or provided by you, the District?

Response 55. The District will host the system and provide laptops, VPN, mobile phones, and all software for call center functionalities.

Question 56. Will agents be working off the District's system platform?

Response 56. Yes.

Question 57. What technology will be provided by the District?

Response 57. DC will host the call center environment including unifies communication and provide the contractor laptops and mobile phones per Section C.3.18..

Question 58. Please confirm if the District will be providing voice/data circuits to Gatestone's Points of Presence (POP)? If this will be handled by Gatestone instead, please provide your data center locations/address.

Response 58. The District will provide the voice and data circuits connected to the DC VPN.

Question 59. What are the communication channels required? Voice, Chat, Email, Other? Can you provide overflow contact volumes by channel?

Response 59. Voice only. No overflow data exist and the OTR does not have a current contractor.

Question 60. Are inbound and outbound call required for the program?

Response 60. Yes, inbound and outbound follow-up calls.

Question 61. C.3.2 How will the District ensure the 1075 requirements are complied with? Will there be regular site visits? If so, how frequent?

Response 61. The District will ensure compliance with Pub 1075 through the conduct of annual site visits. During the site visits General security, Physical security, Document security, Personnel security and Computer/Equipment security will be assessed. Specific focus will be on locked facilities and structural requirements; secured containers/equipment; destruction of data upon completion/contract termination; access to tax information by only authorized personnel with the right to know, need to know; data encryption and destruction of all tax information upon termination of the contract.

Question 62. C.3.4 Are there particular headsets that we must use since we will be using DC devices? What are the make and model of the equipment that DC will provide?

Response 62. The vendor must purchase any brand noise-canceling headset with a USB port for use in a call center. A laptop with a softphone interface is provided by the District. See Attachment A, Item 4.

Question 63. C.3.7.1 What are the soft phones that will need to be installed? For mobile phone and laptop configuration, are they not going to be delivered to us ready to use? If not, what type of configuration will be needed? Will a technician certified by the manufacturer be required? Will we be liable if configuration is not correct?

Response 63. iPhone will be configured and deployed with the laptop. The iPhone will be used for VPN authentication, MFA authentication, email and Teams. The OCFO telecom team will configure the mobile phone. The laptop will be configured by the District with all software and the latest windows update. The District manages the security updates remotely as patches and updates required.

Question 64. C.3.7.5 Is the OCFO looking for equipment disposal to be done a certain way or simply want to know that a device was disposed of? So DC does not want any equipment return if it is not working, just for the contractor to dispose of it?

Response 64. Laptops and mobile phones should be returned to OCFO IT for disposal or when a device is no more needed. The District pays for all shipping cost for sending to the vendor, however it is the contractor's responsibility to ship back devices that are no longer needed. The contractor must coordinate with the staff to make sure the devices are packed and shipped to the District. See Attachment A, Item 5.

Question 65. C.3.11 Will training on the LEP service line be provided?

Response 65. Yes.

Question 66. C.3.15 What will be the lead time for turnaround on these deliverables since some items will take longer to develop than others?

Response 66. See Attachment A, Item 6 regarding the 30-day turnaround for Section C.3.15 items and See Attachment A, Item 14 for draft items to be presented in the Offeror's technical proposal.

Question 67. C.3.18 a) How many laptops and iPhones will DC send or will DC send how every many the contractor requests? b) Does the supply include replacement devices? c) Since models change, will DC be sending new releases of devices as they come out? d) Will devices be coming from DC, a DC third party vendor, or directly from the manufacturer? e) Will delivery be FOB destination, meaning we won't be liable until we accept the devices at our facility? f) We will be responsible for installing laptops, correct? g) Will DC provide docking stations for the laptops?

Response 67.

- a) The District issues a laptop and Mobile phone when onboarding, the District only deploy laptop and mobile phone for active staff members.
- b) No.
- c) Yes, the District evaluates and replaces laptops and mobile phones as needed.
- d) The devices will be issued from the District OCIO IT team.
- e) The District insures each equipment when shipping, however the contractor is responsible for tracking and receiving the devices.
- f) The District installs and configures all laptops.
- g) No, the District will not provide docking station and monitors.

Question 68. C.4.0.2. Can 1 qualified manager meet this requirement?

Response 68. Yes, please refer to C.4.0.2.

Question 69. C.4.1.0 If contractor employees aren't in the DC local area, how will DC do fingerprinting?

Response 69. Contract employees located outside the DC local area may obtain the required criminal history check from an appropriate law enforcement agency in their jurisdiction. IRS Pub. 1075, Background Investigation Minimum Requirements mandates, in part, that background investigations for any individual granted access to Federal Tax Information (FTI) must include, at a minimum: FBI fingerprinting (FD-258), which allows the agency to check the applicant's criminal history in all 50 states. See Attachment A, Item 8.

Question 70. C.4.2.1 In addition to the SLA metrics and C.8.3, will DC accept whatever else metrics the contractor's system records?

Response 70. The contractor will be using the systems provided by the OCFO. The District will accept any additional information provided by the contractor from any other source.

Question 71. C.5.0, C.5.1 Although DC will be running daily and weekly reports on our performance, we will only get graded on the monthly reports for the penalty reduction, right?

Response 71. Yes, the monthly reports.

Question 72. C.5.0.3 If we will have a staggering or build up to taking 100% of DC calls, will the 90 day grace period be from when we take the first call or from when we take the first call or from when we take 100%?

Response 72. The contractor must accept all overflow calls. The Monthly Average Call Quality will be enforced 90 days from taking the first call.

Question 73. C.6.2, C.6.5, C.6.6 Since DC will provide initial training and refresher training, isn't the training that the contractor must do only for new hires and the training is on the DC trained material? How often will DC do the refresher training?

Response 73. Reference C.4.1.3 and C.6.6.1 specifically. The contractor will be responsible for the customer service training using industry standards (general basic customer service training.) The OTR will provide specific Tax and Revenue customer service training. The OTR will provide refresher training before major events while the vendor will provide year-round and new hire (train the trainer) training. The training should include the OTR specific training together with basic customer service training. See Attachment A, Items 9 & 11.

Question 74. L.3.2 Technical Approach, What particular details are DC looking for in our IRS safeguard plan?

Response 74. The Contractor's facility, processes, and staff shall meet and remain in compliance with the standards found in IRS Publication 1075, Tax Information Security Guidelines for Federal, State and Local Agencies - <https://www.irs.gov/privacy-disclosure/safeguards-program>. Utilizing District issued devices, is merely a component of maintaining the security for IRS Publication 1075. Additional areas include patch management/vulnerability management at end points, account passwords, and onboarding and offboarding of resources. Having District issued devices, ensures the VPN client is patched and provides access to District systems such as Aspect and MITS. The Contractor will have additional responsibilities to ensure IRS Publication 1075 compliance, such as ensuring staff is in a facility that is behind two barriers, agree to the cyber-Hygiene, destroy any print outs, conduct proper background checks of staff, and understand the disclosure of the data rules and penalties associated with IRS Publication 1075.

Question 75. Can employees supporting this contract for Overflow Call Center work remote/work from home, anywhere in the United States?

- a) If working from home, is there an expectation "to ensure staff is in a facility that is behind two barriers, as well as follow all applicable federal, state, and District of Columbia laws and regulations for the operation of a business?"

- b) RFP references that the contractor hires 51% of employees, who are residents from the District of Columbia. Is this an expectation that must be met to fulfill contract?
- c) What is the First Source Register that should be used for identifying employees?

Response 75. Yes, in the continental U.S. per Section C.3.1, provided that the contractor provides the OTR with their telework policies and procedures and are approved by the OTR in accordance with Section C.7.3.

- a) Yes.
- b) If an offeror's Total Estimated Price for the Base Year, or any Option Year, is in the amount of, or exceeds, \$300,000, the provisions of Section I.31 shall apply for the period. The provision requires that at least 51% of the contractor's new employees hired to perform the contract shall be District residents. Offerors must complete Attachment J.9 Department of Employment Services First Source Employment Agreement and Plan and submit it with its proposal (per Section L.3.3.5). The OCFO will submit the agreement and plan for approved by the D.C. Department of Employment Services (DOES). DOES must an offeror is in compliant for the offeror to be eligible for award. DOES may be contacted at (202) 724-7000 or does@dc.gov for further information regarding the First Source Act.
- c) DOES may be contacted at <https://does.dc.gov/>, (202) 724-7000, or does@dc.gov for information regarding the First Source Register.

Question 76 Contact Center Hours/Staffing:

- a) What are the specific hours for the Call Center?
- b) Will the contract incorporate the cost of a Manger? On the Wages list, only Customer Services' Representatives positions are listed. However, RFP states the need to have one or more managers – is there a specific number necessary?
- c) Is there an ideal number of representatives expected? [We] analyzed the information based upon 12 representatives.
- d) Will [we] need our own Technical Support, or will equipment and applications be managed and updated by current ITS group?
- e) Will [we] need a dedicated Trainer to support the project?
- f) Which months are expected to have 1000 calls per week, (5 months) as opposed to 750 calls per week (7 months)?

Response 76.

- a) Refer to Section C.2.2(4).
- b) Section B.3 states the contractor's pricing must be all-inclusive, therefore, the cost for the requirement manager must be incorporated. Also, see Response 68 and refer to Section C.4.0.2.
- c) The contractor shall provide sufficient number of representatives to meet the contract requirements, especially to meet the Service Level Requirements (C.5).
- d) The District will support and update the laptops. The District will also configure, monitor compliance, and support all mobile phones.
- e) Yes, C.6.3.
- f) Approximately 1,000 calls: February through June (Peak), 750 calls: July through January (Non-Peak).

Question 77. Equipment/Tools/Applications:

- a) Will the contractor be responsible for equipment, such as laptops, monitors, headsets, mobile phones, etc.?
- b) Will the contractor utilize the current IVR system and VPN network? Or will the contractor need to "own" their own network, IVR, VPN? If contractor has to own/provide connectivity, are there specific requirements to link to the existing call center?
- c) Will [we] be responsible for developing reports to analyze data?
- d) What are supplies for this contract that would need to be inspected?

Response 77.

- a) The contractor will be responsible for all necessary equipment, except for the equipment provided by the District. Refer to Sections C.3.4 and C.3.18.
- b) See Section C.3.12 specifically Section C.3.12.3. The District provides full access to the IVR. The contractor will be given a VPN account that will allow them to connect to the District's call center. The District will also provide mobile phones for VPN and Multi Factor Authentication. The contractor must ensure that each employee has access to a high-speed internet connection. See Attachment A, Item 4.

- c) The contractor will not be responsible for developing analytical reports as the OTR will have system access for its reports. See Attachment A, Item 13.
- d) The contractor's operations will be inspected in accordance with IRS Pub 1075. The supplies to be inspect will be dependent on those used by the contractor for its operations.

Question 78. Training/Documentation:

- a) Will the project provide specific Standard Operating Procedures (SOPs) or does [the contractor] need to develop?
- b) Who will train representatives and/or manager? What is a typical/reasonable training timeline for employees?
- c) If contractor is responsible for cost of training, what does that cost look like?

Response 78.

- a) OTR will provide SOPs.
- b) Refer to Section C.6
- c) The contractor's cost for training is undetermined.

Question 79. Will calls be handled through the District's telephone system or through the contractor's system?

Response 79. The District's telephone system.

Question 80. Will the contractor have access to the District's phone system data in order to meet the contractual reporting requirements?

Response 80. Yes.

Question 81. How are call audits to be performed? Will the contractor handle this themselves? If so, will they have access to call recordings in order to perform such assessments?

Response 81. The OTR's Quality Assurance Unit will perform Call Reviews. The contractor will have access to call recordings.

Question 82 Can the District provide the average call time per incoming call?

Response 82. Peak Season: 8 minutes and 23 seconds. Non-peak: 8 minutes 52 seconds.

Question 83. What is the average length of time a new hired agent is in training?

Response 83. The average length of time to train a newly hired agent (hired after the initial OTR training has completed) is 6 weeks and should be provided by the contractor (train the trainer).

Question 84. Page 11 of the specifications, section C.5.1; can the District expand on how monthly performance standards will be monitored (e.g. a sample scorecard and the number of calls to be audited)?

Response 84. See Response 53.

Question 85. Page 57 of the specifications, Section I.30, would the District permit subcontractors to have only the types of insurance and reduced coverage limits that are relevant/proportional to their role?

Response 85. If a prospective offeror has alternatives it wishes to present to the District, it should do so per Section L.2. See Attachment A, Item 1 for the revised deadline for inquiries. Offerors may propose exceptions; however, the District may seek award of a contract on the basis of initial written proposals received, without discussion. Therefore, each proposal must contain the Offeror's best terms from the standpoint of price, legal and technical abilities and other factors.

Question 86. Pages 59 & 60 of the specifications, limits of insurance for Cyber and Professional Liability are stated at \$5M, on the following page in section 9, \$5M of excess coverage is requested; is the District requiring \$5M limit total through a combination of an underlying policy and an excess policy or does the District require coverage of \$10M total? If the latter, can the limits be reduced to \$5M total?

Response 86. The District expects a coverage of \$10M total.

Question 87. Page 59, section 6, is Employment Practices Liability coverage required for the contract or optional?

Response 87. The Employment Practices Liability coverage is required for the contract. In accordance with Page 61, Section H, the Contractor shall submit certificates of insurance giving evidence of the required coverage as specified in this section prior to commencing work.

Question 88. Page 67, section I.a, technical approach and methodology; is the District looking for prospective vendors to address each item in sections C.3 through C.8 or would responding to the items requested in sections I, II, and III be acceptable?

Response 88. The District is expecting for Offerors to address each item in Section C.3 through C.8, and particularly the safeguard plan and policies, procedures for use of District property, and drafts for Section C.3.15 items. See Attachment A, Item 14.

Question 89. Attachment J.1; what occupation code is appropriate for the overflow contact center representatives for this procurement? 01041, Customer Service Rep I; 01042, Customer Service Rep II; 01043, Customer Service Rep III? What about for a Supervisor or Team Lead role?

Response 89. In accordance with Attachment J.1, it is not the job title but the required tasks that determine whether a class is included in an established wage determination. The duties of employees under job titles listed are those described in the "Service Contract Act Directory of Occupations". Any class of service employee which is not listed in J.1 and which is to be employed under the contract (i.e. the work to be performed is not performed by any classification listed in the wage determination) must be classified by the contractor so as to provide a reasonable relationship (i.e. appropriate level of skill comparison) between such unlisted classifications and the classifications listed in the wage determination.

Question 90. Should prospective vendors submit the Employer Information Report and/or the First Source Employment Agreement documents with their response? If the prospective vendor is seeking a waiver to the First Source program, how should that be presented in the proposal?

Response 90. Offerors should submit its Employer Information Report and the First Source Employment Agreement documents with its proposal in accordance with Section L.3.3, even if an Offeror wishes to seek a waiver according to Section VIII of J.9, First Source Employment Non-Construction Agreement. The OCFO will submit the First Source documents for approval of compliance by the D.C. Department of Employment Services (DOES). Offerors must be deemed in compliance by DOES for the offeror to be eligible for award. DOES may be contacted at (202) 724-7000 or does@dc.gov for further information regarding the waivers.

Question 91. Background, Section C.2, Page 4, Please provide a copy of the current contract for review.

Response 91. Not applicable. The OTR does not have an Overflow Call Center contract.

Question 92. Call Center, Section C.2.2.2, Page 5, Please confirm that Contractor staff will use District provided laptop and softphone software to connect to District Aspect ACD/IVR to receive/place telephone calls.

Response 92. Confirmed.

Question 93. Contractor Tasks and Responsibilities, Section C.3.1, Page 5, Please confirm that Contractor does not need to provide any telephony infrastructure of its own for this engagement.

Response 93. Confirmed.

Question 94. Contractor Tasks and Responsibilities, Section C.3.12.3, Page 7, Please confirm that all connectivity to District systems is accessed via a VPN session from the laptop (and that no systems are accessed directly via the internet).

Response 94. Correct.

Question 95. Contractor Tasks and Responsibilities, Section C.3.12.3, Page 7, Please specify the configuration of VPN that the District wishes to leverage from Contractor facility (e.g., SSL/VPN from each laptop to District, IPsec VPN from each laptop to District, Site to Site VPN tunnel between Contractor and District that all laptops would leverage).

Response 95. VPN connection from user's laptop to the District's VPN site. VPN connection is established via user's laptop to the District VPN tunnel.

Question 96. Contractor Tasks and Responsibilities, Section C.3.18, Page 8, Will District provided laptops and mobile devices be delivered with all software/applications (including security related software) and be pre-installed and pre-configured for Contractor use? If no, what software titles/applications would the Contractor be required to provide and maintain?

Response 96. District will provide and maintain the software.

Question 97. Contractor Tasks and Responsibilities, Section C.3.18, Page 8, Please define what technology function(s) the District provided mobile device is meant to solve for. When and how would the mobile device be used?

Response 97. iPhone will be configured and deployed with the laptop. The iPhone will be used for VPN authentication, MFA authentication, email and Teams. The OCFO telecom team will configure the mobile phone.

Question 98. Contractor Tasks and Responsibilities, Section C.3.18, Page 8, Please confirm whether the District or Contractor is responsible for patching and managing laptops provided by the District.

Response 98. The District maintains the laptops.

Question 99. Contractor Tasks and Responsibilities, Section C.3.18, Page 8, Who is responsible (District or Contractor) for patching and managing mobile devices provided by the District?

Response 99. The District maintains the mobile phones.

Question 100. Contractor Tasks and Responsibilities, Section 3.4, Page 6, Does the District have specific headset makes/models that are known to work well with the District Aspect telephony solution, or able to provide general technical requirements for a headset purchase?

Response 100. USB, any brand.

Question 101. Confidentially and Nondisclosure affidavit, Section H.12, Page 35, Based on OTR operating procedures, is there any expectation that agents will do anything with Federal Taxpayer Information (FTI) aside from view it in the District-provided applications? Will it ever be downloaded to the laptops or otherwise stored anywhere in the Contractor environment? If so, what format will the data be in and exactly what FTI data elements will be included?

Response 101. In some instances, the District may assess a tax based on information obtained from the Internal Revenue Service. The IRS considers this OTR assessment federal tax information and must be protected in the manner prescribed in Pub. 1075. Because this information may be widespread in the MITS, the contractor may respond to a call where some elements in the MITS contains this information and must therefore, consider all data in the MITS as FTI. The contractor's agents will not be updating the financials but only updating the debtor's response based on the phone call. FTI, as provided by the IRS will never be downloaded to a laptop and cannot be stored in the contractor's environment.

Question 102. Please can you provide a heat map/call arrival patterns that will help inform the staffing requirements for the overflow activity?

Responses 102. The call interval chart is provided as follows:

Interval (Starting)	PEAK	NON PEAK
08:00	MODERATE VOLUME	LOW VOLUME
08:30	HIGH VOLUME	MODERATE VOLUME
09:00	HIGH VOLUME	MODERATE VOLUME
09:30	HIGH VOLUME	MODERATE VOLUME
10:00	HIGH VOLUME	MODERATE VOLUME
10:30	HIGH VOLUME	MODERATE VOLUME
11:00	HIGH VOLUME	MODERATE VOLUME
11:30	HIGH VOLUME	MODERATE VOLUME
12:00	HIGH VOLUME	HIGH VOLUME
12:30	HIGH VOLUME	HIGH VOLUME
13:00	HIGH VOLUME	HIGH VOLUME
13:30	HIGH VOLUME	HIGH VOLUME
14:00	HIGH VOLUME	HIGH VOLUME
14:30	HIGH VOLUME	HIGH VOLUME
15:00	HIGH VOLUME	MODERATE VOLUME
15:30	HIGH VOLUME	MODERATE VOLUME
16:00	HIGH VOLUME	MODERATE VOLUME
16:30	MODERATE VOLUME	LOW VOLUME
17:00	LOW VOLUME	LOW VOLUME

LOW VOLUME
MODERATE VOLUME
HIGH VOLUME

Question 103. Please can you provide the current staffing model used to support this overflow activity, specifically if there is a dedicated team or if this is a shared queue service, and current staffing levels?

Response 103. Not applicable. The OTR does not have an Overflow Call Center contract.

Question 104. We understand there is a requirement to answer calls that are in queue at 5:30 and so overtime to support that may be required. Is there a requirement to return calls, after hours? Is there any other after-hours work?

Response 104. No after-hours work is required of the contractor.

Question 105. What is the average handle time including wrap, by call type if possible?

Response 105. Peak Season: 8 minutes and 23 seconds. Non-peak: 8 minutes 52 seconds.

Question 106. Please confirm DC will provide our agents with licenses to the IVR and ACD.

Response 106. The District will manage licenses.

Question 107. Please confirm if DC requires vendor to provide any technologies, or if this is purely overflow call center staffing.

Response 107. The contractor will be responsible for all necessary equipment, except for the equipment provided by the District. Refer to Sections C.3.4 and C.3.18. Beyond the equipment requirement, the contractor overflow call center services will be labor.

Question 108. The requirement states we would staff this from our facility. Please confirm if DC supports a remote agent workforce consistent. Please clarify if our facilities would need to be in DC, or if we can operate from existing facilities elsewhere.

Response 108. Refer to Response 75 and refer to Response 9.

Question 109. Who is the incumbent and what is the current contract number?

Response 109. Not applicable. The OTR does not have an Overflow Call Center contract.

Question 110. Who provides the main call center services, to OTR, or is it staffed directly by OTC? If outsourced, what is the contract number please?

Response 110. OTR's CSA provides main call center services. The OTR does not have an Overflow Call Center contract.

Question 111. What is the budget for this overflow call center?

Response 111. \$821,400.00.

Question 112. We would like to clarify one point before proceeding: can the District please indicate if the subcontractor requirement is in effect for this solicitation? Are vendors only eligible to participate if they meet the terms as described in section H.3 (Certified Business Enterprise Subcontracting Requirements) of the solicitation? Likewise, is the 51% resident requirement in effect for this solicitation? Are vendors only eligible to participate if they meet the terms as described in section I.31 (District Residents) of the solicitation?

Response 112. In accordance with Section H.3 of the RFP, certified business enterprise subcontracting requirements does apply to this solicitation.

The 50% CBE requirement expired November 5, 2021, despite the fact that the COVID-19 emergency was extended. Therefore, if a non-CBE Offeror's price proposal for the Base Year is in excess of \$250,000, the non-CBE Offeror must subcontract at least 35% of the dollar volume of the contract to a CBE (certified business

enterprise, certified by the D.C. Department of Small and Local Business Development). In this instance, the non-CBE Offeror must submit an Attachment J.7, Subcontracting Plan fully completed in accordance with Section H.3.4 of the RFP. A CBE Offeror is only required to subcontract to CBEs in accordance with Sections H.3.2(a) and H.3.2(c), if the CBE Offeror chooses to subcontract. The CBE Offeror must submit an Attachment J.7, Subcontracting Plan fully completed in accordance with Section H.3.4 of the RFP.

A request for waiver of Subcontracting Requirements must be submitted in accordance with Section H.3.12 no later than the deadline stated in the section.

Offerors must comply with Section H.3 and submit an Attachment J.7, Subcontracting Plan fully completed in accordance with Section H.3.4. Failure to complete the form accordingly may render the bid non-responsive to this RFP.

In regard to Section I.31, if an Offeror's price proposal for the Base Year is in excess of \$300,000, the Offeror must fully complete Attachments J.9 Department of Employment Services First Source Employment Agreement and Plan and, during the evaluation phase for this solicitation, be found in compliance with the First Source Act to eligible for award. Refer to the "First Source Forms Checklist" in the solicitation package to ensure completeness.

Question 113. H.3.4 A Beneficiary's subcontracting plan shall specify all of the following: (d) the price to be paid by the Beneficiary to the subcontractor. Since with this type of contract the Contractor does not know and does not have input into the actual call volume it takes, it is not possible to assign any specific spend allocations in the DSLBD subcontracting plan. Will OCFO allow a general statement such as "Contractor commits to allocating at least xx% of all spend of the contract to CBE subcontractors"?

Response 113. No. For an Offeror submitting a subcontracting plan:

1. When an Offeror completes its price proposal, the Section B.5.1 Base Year Total Estimated Price amount must be affixed on the line Total Prime Contract Value of Attachment J.7, Subcontracting Plan.
2. The line LSDBE Total must be at least 35% of the Total Prime Contract Value line.
3. Under the Subcontractor Information sections, for each CBE subcontractor entry, all of the boxes and lines must be completed in accordance with Section H.3.4 of the RFP and the Total Amount Set Aside must be a dollar figure.
4. The cumulative total of the Total Amount Set Aside lines, from all of the CBE subcontractor entries, under the Subcontractor Information sections must equal the LSDBE Total line.

5. Offerors may include on its completed subcontracting plan a general statement such as “the Total Prime Contract Dollar Value in the CBE subcontracting plan is a value that is variable based on the proposed price and the OCFO’s estimated volume. The value reported in the space for Total Amount Set Aside to be paid to the SBE/CBE Subcontractor, for each CBE subcontractor, is calculated based on agreements and the OCFO’s estimated volumes, and does not represent actual expected subcontracting amounts, which will vary based upon the OCFO’s actual volumes. The Contractor commits to allocating at least 35% of all spend of the contract to CBE subcontractors.”
6. In accordance with Section H.3.3, a proposal will be non-responsive if it fails to include a subcontracting plan that is required by law.

Question 114. Can you confirm the First Source requirement does not apply?

Response 114. The provisions of the First Source Act apply to the Contractor’s new employee hires to perform work in conjunction with the contract.

Question 115. CBE Subcontract Goal Reporting: Is a track that the Contractor is meeting the CBE commitment goal each quarter a calculation of the amount paid to CBEs in the quarter and divided by total amount paid by the OCFO to the Contractor in the quarter?

Response 115. The Department of Small and Local Business Development (DSLBD) enforces CBE subcontracting compliance and can be contacted at (202) 727-3900 or dslbd@dc.gov for any questions regarding DSLBD’s approach to monitoring CBE subcontracting compliance and the quarterly report required in accordance with Section H.3.9.

Question 116. Should the documents regarding Small Business Enterprise contracts be included with the proposal or submitted in advance? If they should be submitted in advance, what is the deadline?

Response 116. In accordance with Section H.3.12, prior to submission of proposals, the Offeror may request a waiver of the subcontracting requirements by filing a written request to the point of contact on Page 1 of this solicitation, to the attention of the Contracting Officer detailing the reasons justifying a waiver, including the Offeror’s efforts to secure involvement by Certified Business Enterprises, no later than the deadline stated in the section. The Offeror’s good faith efforts must address the information in Section H.3.12(d), and particularly Section H.3.12(d)viii, whether the Offeror effectively used the services of the Department of Small and Local Business Development, (202) 727-3900 and <http://dslbd.dc.gov>, in recruiting qualified certified business enterprises.

In the absence of an approved waiver of the subcontracting requirement, in accordance with Section H.3.3, an Offeror shall submit a subcontracting plan as part of its proposal per Section L.3.3.3.

Question 117. I am writing to ask that you consider modifying Solicitation CFOPD-22-R-914. As it is currently written including the following Requirements our company is unable to provide a viable proposal that would give the District of Columbia Office of the Chief Financial Officer proposal which would deliver satisfactory results. If you were to waive these requirements and allow the bidder to operate out their existing facility then we would be able to offer a meaningful proposal which the District of Columbia Office of the Chief Financial Officer would find meetings the needs of the agency. Requirements in Question:

- 35% small business subcontracting required, unless no sufficient SBE exist, then must subcontract 35% to any qualified certified business enterprises (see H.3 for full requirements, including waiver)
- 51% district resident new hire requirement and first source employment agreement (see I.31)
- Preferences (max. 12% total): 3% for SBE; 5% for certified Resident-Owned Business; 10% for certified longtime resident business; 2% for certified local business, 2% for certified local business in DZE zone; 2% for certified disadvantaged business, 2% for certified veteran-owned business; 2% for certified local manufacturing business.
- References: The Offeror shall provide a reference list of contracts or subcontracts the Offeror has satisfactorily performed within the past five (5) years that are similar in size and scope as the required services described in Section C. "Similar in size and scope" is in relation to call volume as estimated in Section B for a public sector client. The Offeror's list shall include the following information for each contract or subcontract:
 - Provide at least three (3) client completed Attachment J.6, Past Performance Evaluation Forms from the list of references identified in response to Item (b) above

Response 117. Offeror are expected to provide service from their existing facility. The 35% small business subcontracting required may be waived in accordance with Section H.3.12. The 51% district resident new hire requirement may be waived by DOES; refer to Response 90. Preferences for certified business enterprises is a provision in D.C. Official Code and cannot be waived for this RFP. References and Past Performance Evaluation Forms demonstrate standards of responsibility and will not be waived for this RFP.