AMENDMENT OF SOLICITATION / MODIFICATION OF CONTRACT

1. Contract Number	CFOPD-22-C-014
Page of Pages	1 | 1 + Attachment A
2. Amendment/Modification Number	Modification 6
3. Effective Date	See 16 C below
4. Requisition/Purchase Request No.	
5. Solicitation Caption	Overflow Call Center

6. Issued by: Code

Office of the Chief Financial Officer
Office of Contracts
1100 4th Street, S.W. Suite E620
Washington, D.C. 20024-4453
202-442-7012 main

7. Administered by (If other than line 6)

8. Name and Address of Contractor (No. street, city, county, state and zip code)

Navient B.P.O., LLC
13865 Sunrise Valley Drive - Suite 100
Herndon, VA, 20171-6188
Chad Wilson - President
800-756-3522 main
585-237-7037 office
chad.wilson@navient.com

Code Facility

9A. Amendment of Solicitation No.

9B. Dated (See Item 11)

X 10A. Modification of Contract/Order No. CFOPD-22-C-014

10B. Dated (See Item 13) August 31, 2022

11. THIS ITEM ONLY APPLIES TO AMENDMENTS OF SOLICITATIONS

☐ The above numbered solicitation is amended as set forth in item 14. The hour and date specified for receipt of Offers ☐ is extended. ☐ 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 __________ copies 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

X	A. This change order is issued pursuant to (Specify Authority): 27 DCMR Chapter 2008 and § F.2 – Option to extend the term of the contract and 27 DCMR § 3601.3(a) and §I.8 – Changes, contained in the contract. The changes set forth in Item 14 are made in the contract/order no. in item 10A.
	B. The above numbered contract/order is modified to reflect the administrative changes (such as changes in paying office, appropriation data etc.) set forth in item 14, pursuant to the DC Financial Responsibility and Management Assistance Authority.
	C. This supplemental agreement is entered into pursuant to authority of:
	D. Other (Specify type of modification and authority)

E. IMPORTANT: Contractor ☐ is not ☒ is required to sign this document and return one copy to the issuing office.

14. Description of Amendment/Modification (Organized by UCF Section headings, including solicitation/contract subject matter where feasible.)

The District intends to achieve the following with Modification 6:

A. This contract identified in Block 10A above is hereby modified as described in Attachment A, page 2 - 5:

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)	Chad Wilson President
16A. Name of Contracting Officer	Dorothy Whisler Fortune, Esq., CPPO, Drakus Wiggins, CPPB, CPPO or Anthony A. Stover, CPPO
15B. Name of Contractor	Chad Wilson (Signature of person authorized to sign)
15C. Date Signed	9/20/24
16B. District of Columbia	Drakus Wiggins (Signature of Contracting Officer)
16C. Date Signed	09/23/2024

ATTACHMENT A

Item 1. Section C.2.2.4 is hereby deleted in its entirety and replaced as follows to reference peak and non-peak tax season:

The Call Center's hours of operation during the District's peak (January 1 – May 31) and non-peak (June 1 – December 31) tax season are Monday – Friday, 8:15 am to 5:30 pm. All telephone calls remaining in the queue beyond 5:30 pm are answered by a live agent, generally requiring staffing beyond 5:30 pm. The ACD is operational during designated business hours. The Customer Service Call Center is reached by dialing (202) 727-4TAX (429).

Item 2. Section C.3.4.1 is hereby deleted in its entirety and replaced as follows for flexible agent staffing:

The Contractor shall equip and train a minimum of ten (10), and not more than fifteen (15) agents initially, exclusive of supervisors, and utilize these agents on a part-time basis during the District's peak tax season as defined in section C.2.2 Call Center. During the District's non-peak tax season as defined in section C.2.2 Call Center, the Contractor shall equip and train a minimum of two (2), and not more than seven (7) agents exclusive of supervisors. Utilizing this model, the Contractor can provide a core group of personnel covering all operating hours during the District's peak and non-peak tax seasons, with additional trained and ready resources on call and available at a moment's notice to respond to times of higher demand. The District will support this operating model, including supporting the Contractor's need for equipment, licenses, and enabling "train-the-trainer" capabilities so that the Contractor can be in the best position to meet the District's needs.

Item 3. Section C.3.12.2 is hereby deleted in its entirety and replaced as follows to add reference to "business income":

Service or product information including responses to inquiries and questions regarding individual income, business income and property tax bills, tax exemptions, tax benefits, penalty and interest concerns, tax payments and refunds, assistance with the taxpayer identity quiz and other supports as appropriate.

Item 4. Section C.5 is hereby deleted in its entirety and replaced as follows to revise the Service Level Agreement requirements:

C.5 SERVICE LEVEL AGREEMENT REQUIREMENTS

C.5.0 Performance standards as established in this Contract and best industry practices must be maintained by the Contractor throughout the term of the contract. The performance standards will be calculated and reported monthly by the COTR. The COTR, as a regular business practice, will generate real-time, daily or multiple daily reports to measure the Contractor performance. Performance standards are identified below:

C.5.0.1 Monthly Average Call Quality of 95% or greater, after the first 90 days of the Contractor staff taking calls on the phone. The CSA Quality Assurance Team, using a quality monitoring scorecard, will measure the call quality of the Contractors live operator and recorded calls based on the following:

1. Call opening / greeting
2. Caller verification / authorization
3. Accuracy of the information presented
4. Communication skills
5. Customer service
6. Closing / exit
7. Account notations

C.5.0.2 A required 100% in proper use and documentation of calls in the MITS shall be maintained.

C.5.0.3 Callers shall not be placed on hold longer than one hundred twenty (120) seconds.

C.5.0.4 The number of caller complaints about the Contractor call center shall be 2% or less of all incoming calls answered by the Contractor’s agents. Copies of the complaints and their resolution shall be sent to the OTR Customer Service Administration director within one week of the day the complaint was made.

C.5.0.5 Seventy five percent (75%) of calls shall be resolved without a transfer, second call or a return call.

C.5.0.6 The Contractor shall evaluate no less than weekly the sufficiency of the number of active CSRs and staff schedules and provide a minimum of ten (10) agents on a part-time basis during the District’s peak tax season as defined in Section C.2.2 Call Center 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 growth.

C.5.1 The COTR will report monthly and monitor performance under the Contract and measure the Contractor against the performance standards of Section C.5.0.1-C.5.0.6. Calculations shall be based on the month the performance is completed.

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

C.5.1.2 Each month, if the Contractor fails to meet the six 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**
6	0%
5	10%
4	25%
3	50%
2-1	75%
0	100%

C.5.1.3 In the event that call volumes exceed operational forecasts by 15% or more, the Contractor will not be penalized for failure to meet SLR performance targets. Regardless of volumes, circumstances, or the applicability of financial penalties, the Contractor shall maintain good faith efforts to achieve high levels of performance at all times.

Item 5. Section C.6.2 is hereby deleted in its entirety and replaced as follows to add "Business Income Tax training":

C.6.2 The Contractor and its staff will have direct access to the District of Columbia's Modernized Integrated Tax System (MITS), will be providing assistance to taxpayers regarding various tax types and will be updating account level information in MITS. The OTR, CSA will provide initial training up to six (6) weeks virtually, using Microsoft TEAMS, including resources and support. Initial training will include the following:

1. Tax and Revenue Customer Service Training
2. Computer Base Training (CBT) through the OCFO Learning Manager
3. MITS Basic training
4. Real Property Core training
5. Individual Income Tax training
6. Business Income Tax training
7. Identity Quiz (RUI) basics and Core training
8. UNAX Federal Compliance training
9. Cybersecurity training

Item 6. Section B.5.3 OPTION YEAR 2 of the Price Schedule is hereby deleted in its entirety and replaced for the following purposes:

1. Increase CLIN 201 Estimated Quantity from 41,000 to 70,078; and
2. Increase the contract not to exceed amount for the Option Year 2 from $260,350.00 by $184,645.30 to $444,995.30.

Item 7. Add Section B.5.3 Option Year 2 as follows:

B.5.3 OPTION YEAR 2

CLIN	Item Description	Price Per Unit	Estimated Quantity	Total Estimated Price
CLIN 201	**Overflow Call Center Services**	**$6.35 per answered call**	**70,078 answered calls**	**$444,995.30**

Item 8. Pursuant to Section F.2 – Option to Extend the Term of the Contract, the District hereby exercises the remainder of Option Year 2 for the period of October 1, 2024, through August 30, 2025. The funding for this period is not to exceed $444,995.30. The cumulative value of the contract is increased by $444,995.30 to an amount not to exceed $1,300,483.63.