

SERVICE BC – MASTER SERVICES AGREEMENT CHANGE ORDER FORM

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PROGRAM INFORMATION

PROGRAM Service BC	AGREEMENT NUMBER C17SBC35815	CHANGE ORDER NUMBER 2018-SBC-CO-25
	PROJECT MANAGER Anjan Chhetry	
PROGRAM MANAGER Cindy McMath	PROJECT SPONSOR Duff Lang	

CHANGE ORDER (CO) INFORMATION

CHANGE TITLE Additional resources in support of Ministry of Finance mail-out for new Speculation and Vacancy Tax Program (Phase 2)		REQUESTOR Cindy McMath, MAXIMUS Canada Services, Inc.	
DATE SUBMITTED (MONTH DD, YYYY) October 30, 2019			
CO IMPACTS:	Budget	Schedule	Scope/Quality
	Yes	Yes	Yes

CHANGE ORDER (CO) DETAILS

I. DESCRIPTION OF CHANGE(S)

Provide a brief description of the current situation or events that have resulted in this CR and outline the pros and cons of the change. For example, "The business area has requested the addition of new functionality for the application for following reasons....."

This Change Order is made pursuant to the Master Services Agreement between MAXIMUS Canada Services, Inc. ("MAXIMUS") and the Province dated January 1, 2017 (the "Agreement"), under which MAXIMUS provides certain contact centre and related services to the Province. This Change Order documents Phase 2 of the Transition process and additional Services required to support the launch of the Speculation and Vacancy Tax Program (the "SVT Program"), a new program being introduced by the Ministry of Finance ("FIN"), and the payment of additional Fees for those Services. The SVT Program requires homeowners in specific (mostly urban) areas of the province to provide a declaration that they meet certain criteria in order to be exempt from a new homeowner tax that is aimed at reducing the speculative housing market and controlling rising prices for both home buyers and renters in those areas of the province. This Change Order addresses the additional Services to be provided by MAXIMUS following Phase 1 of the SVT Program (documented in CO24), and outlines Deliverables for Phase 2 over the period January 2, 2019 to May 31, 2019. The Parties will determine whether any ongoing updates to the staffing model are required prior to May 31, 2019, and if so then those changes will be documented in a separate Change Order.

The Parties acknowledge that the staffing model agreed to in this Change Order for the provision of Contact Centre Services for the SVT Program will not be sufficient to enable MAXIMUS to meet Performance Measure 12 ("PM 12"), which requires 80% of calls to be answered within 60 seconds, in relation to calls regarding the SVT Program. Therefore, the parties agree that PM 12 will not apply to such calls. In order to ensure that the calls regarding the SVT Program are measured separately, a unique phone number has been implemented, and a separate queue will be applied for those calls beginning in January 2019. Notwithstanding the foregoing,

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PAGE 1 of 13

SERVICE BC – MASTER SERVICES AGREEMENT

MAXIMUS will use best efforts within the constraints of the staffing model to achieve a Compliant Speed of Answer Rate for calls regarding the SVT Program.

The Parties further acknowledge that MAXIMUS will be performing certain work and incurring certain costs during the implementation of this Change Order (Phase 2 of the SVT Program), and that it is the intention of the Parties to move forward with the work outlined in this Change Order. If, however, the Province decides, in its sole discretion, not to move forward with the work (or any part of the work) outlined in this Change Order, the Province will reimburse MAXIMUS for work actually performed and reasonable costs (including markup) incurred in relation to such work, up to and including the date of cancellation, provided that: (a) MAXIMUS provides the Province with details satisfactory to the Province of the specifics of work performed and costs incurred by MAXIMUS in relation to Phase 2 work; and (b) the amount payable by the Province in relation to this Phase 2 work is consistent with the financial model for this Change Order, as outlined in section V (Financial Model and Implementation Costs) of this Change Order.

II. REASON FOR AND DESCRIPTION OF CHANGE(S)

Provide a brief description of the current situation or events that have resulted in this CR and outline the pros and cons of the change. For example, "The business area has requested the addition of new functionality for the application for following reasons....."

This Change Order sets out the additional Services to be provided by MAXIMUS in relation to the SVT Program and the Fees to be paid by the Province to MAXIMUS for the handling of additional calls during the period of January 2, 2019 to May 31, 2019 resulting from the implementation of the SVT Program.

In addition, this Change Order sets out the Fees payable for the set-up of a new "Do Not Reply" e-mail address that was deployed in early November 2018 as part of Phase 1 of the SVT Program.

III. IMPACT DUE TO CHANGE

Describe any impacts to related projects that may occur if the proposed change is approved.

There are no impacts to related projects.

Impact / Risk Area	Impact / Risk	Risk #	Mitigation Strategy
Client Business Impacts (Service BC)	Volume could impact speed of answer.		A separate phone number has been implemented. This phone number will be placed at a lower priority than the Service BC general enquiry line.

SERVICE BC – MASTER SERVICES AGREEMENT

Service Delivery Impacts to Public Facing or Public Safety Services (Citizens)	Citizens will likely wait longer for service during part of the peak time (January – March 2019) than they are accustomed to waiting for other Services.		A separate phone number has been implemented. This phone number will be available for extended hours throughout the peak time frame of January – March, 2019. The Province will publish these extended hours in relevant communications – including messaging on IVR system – to try to encourage Citizens to call outside regular Business Hours. The Province will help to manage volumes by collecting feedback from the Contact Centre on FAQs, system concerns, etc.
Technical Risks (infrastructure; business solutions; architectural impacts)	N/A		
Security Risk	N/A		
Data Sensitivity/Privacy Risks	N/A		
Financial Risks	N/A		
Resource Risks	N/A		

IV. RELATED PROJECT CHANGE REQUESTS

List related Project Change Requests and any necessary comments

SBC CO24, which documented Phase 1 of the SVT Program, dealt with the payment of Fees for the set-up of the new phone number for calls relating to the SVT Program, as well as for the handling of additional resulting calls for the period October 1 through December 31, 2018.

V. FINANCIAL MODEL AND IMPLEMENTATION COSTS

Describe the financial or compensation mode. Itemize the costs and any necessary comments

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PAGE 3 of 13

SERVICE BC – MASTER SERVICES AGREEMENT

The financial model for this Change Order is as follows.

Fees will be paid by the Province in five equal payments of \$237,876.00 in the months of January – May, 2019. For clarity, while Fees are not linked to delivery of individual Milestones, all Fees (including Transition Fees), will only be released on completion of all applicable Milestones.

SPECULATION TAX						
Province Fiscal year Summary	16/17	17/18	18/19	19/20	20/21	21/22
s. 17						
Total Price	-	-	731,796	457,584	-	1,189,380

The financial model for this Change Order is based on the following:

- Beginning January 18, 2019, the first 100,000 letters will be sent out (consisting mostly of international addresses);
- Every business day thereafter, another 100,000 letters will be sent up until February 8, 2019 (expectation is that all letters be in Canada Post's care as of February 14, 2019);
- Overall, 500,000 letters will be sent each week for the three-week period (accounting for a total of approximately 1.4 to 1.5 million letters);
- A true up may be required in June 2019 due to the number of assumptions concerning call volumes over this short period, as changes to the assumptions could result in material differences in this regard;
- Transition costs relate to the period November 1, 2018 to the Operations Go-Live Date of Jan 2, 2019; and
- Capacity of named Agents (i.e., head count) has been limited to ^{s.15}

SERVICE BC – MASTER SERVICES AGREEMENT

VI. CONCISE DESCRIPTION OF CHANGE ORDER AND SUPPORTING DOCUMENTS

Insert the revised schedules/documents associated with the requested change (insert object/ create from file/display as icon). Use the "Track Changes" feature to include a view of the original text and the revised text. Embed the document (with "Track Changes" enabled) in this sheet.

DOCUMENT

1. This Change Order will be effective as of January 2, 2019.

2. Capitalized terms not defined in this Change Order are used as defined in the Agreement.

3. The Parties agree that the Agreement is amended as follows:

(a) Section 3.2.(b) of Schedule 5 (Services) is amended by adding, immediately following paragraph (vi) (Ministry of Labour, Employment Services Branch), the following paragraph:

"vii) Ministry of Finance, Speculation and Vacancy Tax

As of January 2, 2019, the Service Provider will provide support via the Channels to facilitate Citizen access to and use of the Ministry of Finance, Speculation and Vacancy Tax website (<https://www2.gov.bc.ca/gov/content/taxes/property-taxes/speculation-and-vacancy-tax>). Without limiting the generality of the foregoing, the Service Provider will:

- (A) provide Citizens with website navigation assistance and guidance to complete online forms and applications available on the website; and
- (B) provide support as otherwise requested by the Province in its sole discretion."

(b) Section 3.3 of Schedule 5 (Services) is amended by adding, immediately following paragraph (d) (Identity and information Management Program, Ministry of Citizens' Services), the following paragraph:

"(e) Ministry of Finance, Speculation and Vacancy Tax

(i) As of January 2, 2019, upon receipt of a Request for assistance by a Citizen, the Service Provider will follow the workflows described in the Knowledge Base to:

- (A) assist Citizens by entering declaration information on the Citizen's behalf directly into the GenTax system. Without limiting any other provision of this Agreement, the Service Provider will, and will ensure that Agents will, verify the Citizen's identify before providing the Services described in this sub-paragraph (A).

(ii) Notwithstanding the foregoing, the Service Provider will, and will ensure that its Agents will, only input Citizen information (including Personal Information) into the GenTax system and do not record such Citizen information in the Service Provider's Systems.

(iii) Where any of the Services described in this Section 3.3(e) require the Citizen to disclose an account password (including, by way of example, the password to the Citizen's BCeID account), the Service Provider will not proceed with the Service and will:

- (A) use best efforts to resolve the Request without use of the account password; or
- (B) if such guidance is not possible, refer the Citizen to the applicable Province Business Area.

SERVICE BC – MASTER SERVICES AGREEMENT

DOCUMENT

Where the Service Provider is unable to provide the required assistance to the Citizen in respect of the Services described in this Section 3.3(e), the Service Provider will:

(C) in real time (when possible) escalate or Transfer the Citizen's Request to the Province in accordance with the workflows set forth in the Knowledge Base, together with as many details as possible to assist the Resolution of the Request; and


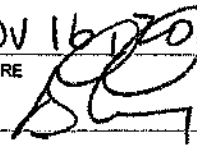
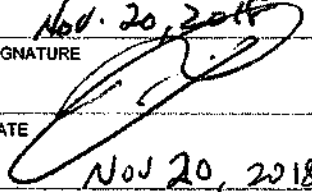
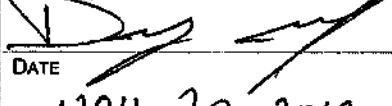
(D) where such real time escalation or Transfer does not resolve the Request, the Service Provider will use its ticketing system to record the name and contact details of the Citizen and such other details regarding the Citizen's Request as the Service Provider considers appropriate in the circumstances and, upon obtaining sufficient information to provide Resolution (including in consultation with the Province), contact the Citizen and proceed to Resolve the Citizen's Request. In relation to the foregoing, the Service Provider will request or record only such Personal Information of the Citizen as is necessary to Resolve the Request."

(c) Section 13 of Schedule 9 (Performance Management Framework) is amended by adding, immediately following paragraph (e), the following paragraph:

"(f) Notwithstanding any other provision of this Section 13, the Parties agree that Performance Measure #12 will not apply to Calls in relation to the Services described in Section 3.3(e) of Schedule 5 (Services). Notwithstanding the foregoing sentence, the Service Provider will use best efforts to achieve a Compliant Speed of Answer Rate for the Services described in Section 3.3(e) of Schedule 5 (Services)."



SERVICE BC – MASTER SERVICES AGREEMENT

VII. MAXIMUS APPROVAL SIGN-OFFS

REQUIRED?	SIGNATURE	COMMENT	SIGNATURE
YES	CINDY McMATH PROGRAM MANAGER, MAXIMUS CANADA SERVICES, INC.		SIGNATURE 
			DATE Nov 16, 2018
YES	DUFF LANG, PRESIDENT, MAXIMUS CANADA SERVICES, INC.		SIGNATURE 
			DATE Nov. 20, 2018
YES	ROB KENNEY VICE PRESIDENT, FINANCE, MAXIMUS CANADA SERVICES, INC.		SIGNATURE 
			DATE Nov 20, 2018
YES	DANIEL GOMBEROFF DIRECTOR, CONTRACTS MAXIMUS CANADA SERVICES, INC.		SIGNATURE 
			DATE NOV. 20, 2018

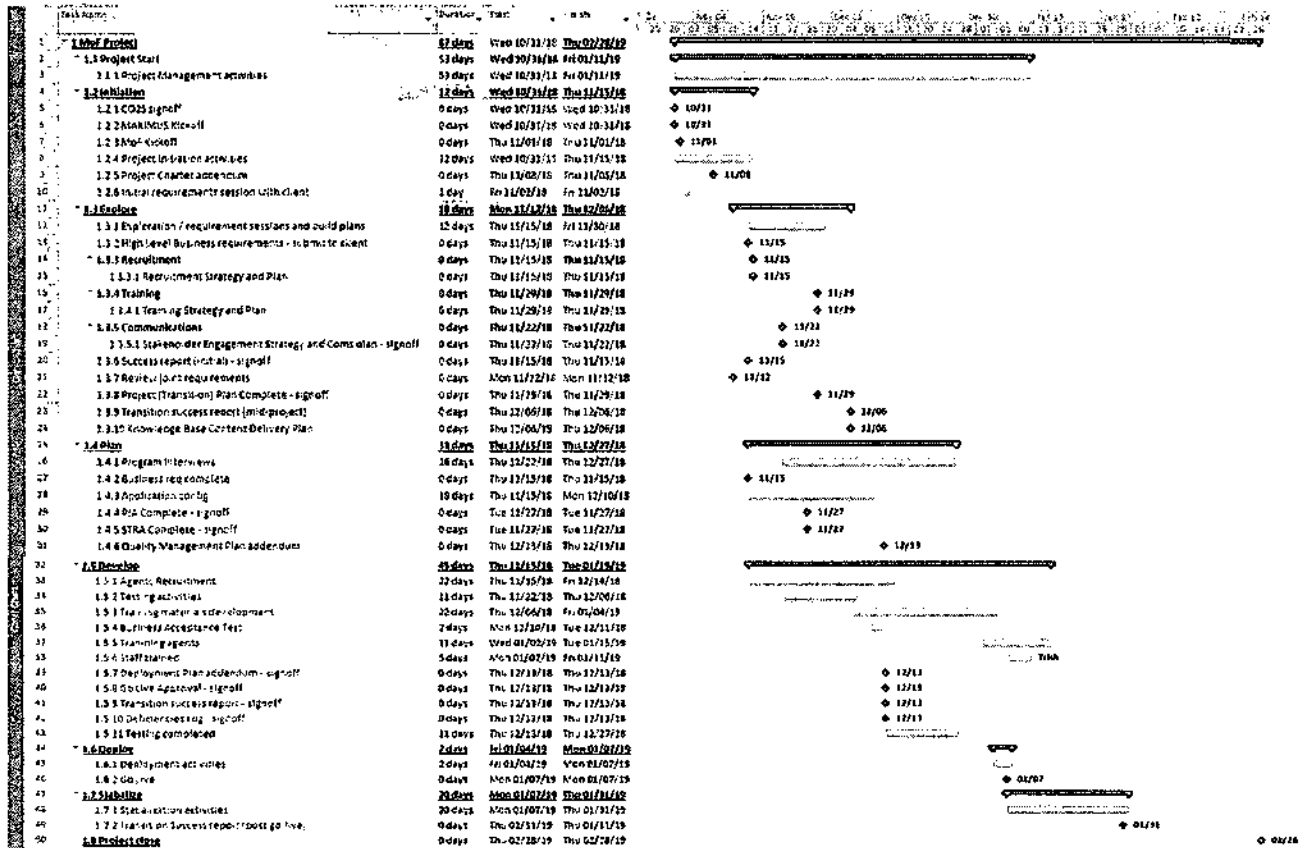
SERVICE BC – MASTER SERVICES AGREEMENT

VIII. MINISTRY OF CITIZENS' SERVICES APPROVAL SIGN OFFS

REQUIRED?	SIGNATURE	COMMENT	SIGNATURE
YES	JEANNETTE EASON DIRECTOR, CONTACT CENTRES		<div>SIGNATURE </div> <div>DATE Nov 21, 2018</div>
YES	RON HINSHAW EXECUTIVE DIRECTOR, SERVICE BC		<div>SIGNATURE </div> <div>DATE Nov. 22, 2018.</div>

SERVICE BC – MASTER SERVICES AGREEMENT

APPENDIX I – HIGH-LEVEL TRANSITION PLAN



SERVICE BC – MASTER SERVICES AGREEMENT
APPENDIX II – MILESTONES

The following are Milestones for this Transition:

Number	Milestone	Milestone Deadline	Milestone Completion Criteria
1.	Approval of Detailed Transition Plan and delivery of Transition Success Report	29 November, 2018	Province provides Approval for Detailed Transition Plan and Service Provider provides interim Transition Success Report.
2.	Transitioned Services Go Live Approval and delivery to the Province of the final Transition Success Report and Transition Deficiencies Log.	13 December, 2018	Province provides Transitioned Services Go Live Approval
3.	Completion of the Transition and delivery to the Province of the updated Transition Deficiencies Log.	18 January, 2019	Services are being provided by the Service Provider as of the Go Live Date with no Critical Deficiencies.

SERVICE BC – MASTER SERVICES AGREEMENT

APPENDIX III – PROVINCE DEPENDENCIES

All of the Province Dependencies upon which the Service Provider is dependent to perform the Transition under this Change Order are set out in the table below.

Number		Province Dependency Date
1.	The Province will, through Service BC's Service Delivery Team, respond to questions posed by the Service Provider for purposes of improving the Knowledge Base.	Within five Business Days from receipt of a question.
2.	The Province will, through Service BC's Service Delivery Team, facilitate meetings between the Service Provider and FIN to allow communications to take place that will facilitate collaboration between the Service Provider and FIN to ensure the Service Provider is ready for the Go Live Date with the appropriate knowledge and resources.	Beginning no later than one week following the signing of this Change Order.
3.	The Province will, through Service BC's Service Delivery Team, assist with the resolution of any issues that arise between the Service Provider and FIN, as permitted.	On an ongoing basis, by the latest date or time by which the Province Dependency must be completed by the Province so as to enable the Service Provider to fulfill its obligation that is dependent upon the Province Dependency in accordance with the Agreement.
4.	The Province will provide the Service Provider with up to date policies, procedures and work instructions regarding the additional Services described in this Change Order such that the Service Provider can create training materials and Knowledge Base articles.	Beginning no later than one week following the signing of this Change Order.

SERVICE BC – MASTER SERVICES AGREEMENT

APPENDIX IV – DELIVERABLES LIST

Deliverable
Detailed Transition Plan
Transition Success Report
Project Charter (Addendum)
Transition Risk Register
Recruitment Strategy and Recruitment Plan
Training Strategy and Training Plan
Stakeholder Engagement Strategy and Transition Communications Plan
New Knowledge Base Content Development Plan (Addendum)
Deployment Plan
Go / No Go Meeting Materials
PIA
STRA

SERVICE BC – MASTER SERVICES AGREEMENT

APPENDIX V – PROVINCE APPROVAL COMPONENTS

The Province Approval Components for this Transition are as follows:

Deliverable
Detailed Transition Plan
Transition Success Report
Go / No Go Approval (sign-off of Go / No Go version of Transition Success Report)