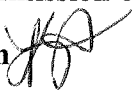


MEMORANDUM

To: Members, Commission on Ethics

From: Kerrie Stillman 

Re: Call center contract renewal

Date: October 9, 2025

I am seeking the Commission's approval to enter into a negotiations for a renewal of the Commission's contract with ROI Solutions for 2025 Form 1 customer support services in 2026.

Following a competitive RFP process, the Commission awarded the call center contract for services with ROI Solutions for the 2024 Form 1 filing season that recently concluded. During this period, ROI provided vital customer support, handling inbound calls from Form 1 filers needing assistance with login issues, system navigation, and completion of the form. They also conducted outbound reminder calls, successfully assisting 55% of filers they spoke to, completing and submitting the form during the call.

This marked our second year utilizing a call center and we were very pleased with the performance and professionalism of ROI Solutions. Their support spanned every phase and of the engagement – from planning and technology implementation to project management and staff oversight. Their team was responsive, collaborative, and exceeded expectations. The project manager played a key role in ensuring day-to-day operations ran smoothly, allowing the Commission to provide the level of service filers have come to expect from this agency.

Additionally, ROI Solutions demonstrated a commitment to efficiency and cost-effectiveness. They identified opportunities to reduce expenses by scaling staffing levels in response to lower call volumes, helping to maximize taxpayer value without compromising service levels. The total amount the Commission paid on the contract was \$173,452.91 which is \$88,953.09 less than expected under the contract.

The current contract includes a renewal clause that allows for two optional one-year extensions. Given the level of service provided, the likelihood of utilizing the same project manager, and the cost savings realized, I ask the Commission to authorize the negotiation a contract renewal for the 2026 filing season. Pursuant to the contract, the renewal cannot exceed \$262,416, which was the contracted amount for 2025. Any resulting addendum to the contract will be brought back for your review and final approval at a future Commission meeting.