

**ATTACHMENT 9**

**TRANSITION MILESTONE PLAN**

**1 Introduction**

The Transition Milestone Plan (the “Transition Plan”) is designed to provide economic motivation for Contractor to meet timeline requirements of the Contract during the beginning of Contractor’s engagement based on completion and acceptance of defined transition milestones (“Milestones”). The intent of the Transition Plan is to create a framework for the fees associated with stand up of Services to be provided by Contractor. In general, the payment of stand-up related fees associated with Milestones will be contingent on compliance with contractual requirements and schedule performance to the degree specified below. The Transition Plan is anticipated to cover work to stand up and transition E-rate business processing services to a new vendor.

**2 Scheduled Milestones**

In accordance with **Statement of Work**, USAC and Contractor will agree to Milestones. At minimum, the Milestones will include the last Milestone set forth below (“Cutover”) and at least one (1), but up to three (3), earlier Milestones. USAC will pay the portion of the fee applicable to each Milestone after achievement of such Milestone (as determined by USAC’s acceptance), subject to on-time delivery as described in this Attachment and as further described in **Statement of Work**. The percentage of the total fee available at each Milestone (subject to acceptance) is outlined in the table below.

Milestone	Date	Percentage of total Stand-up Fee available at Milestone
Services Start Date		
Transition Period, including 1 to 3 Milestones to be defined by Contractor including due dates and the following deliverables:		
<ol style="list-style-type: none"> <li>1. Establish project management team to ensure and oversee four (4) transition work streams (Technology, Reporting &amp; Quality Assurance, Operations, Hiring &amp; Training)</li> <li>2. Establish processes and standard operating procedures (with process flows and escalation paths)</li> <li>3. Finalize staffing plan, facilities, connectivity, infrastructure, dependencies, architecture, licensing, training and access approvals</li> <li>4. Technology implementation</li> <li>5. Risk mitigation plan</li> </ol>	TBD	50% total of Standup Fee to be spread across interim Milestones
Cutover Date	TBD Estimated	50 %

The final Milestone – the Cutover Date, is estimated to occur by January 1, 2023, subject to change by USAC. The dates and descriptions of any earlier Milestones should be proposed by Contractor as part of its RFP response and agreed to by USAC and Contractor as part of the negotiations process. Examples of potential Milestones, other than the Milestones above, include completion of technical integration, or completion of all required trainings and guidelines, but Milestones and details of the deliverables at each Milestone should be tailored to Contractor’s planned approach to operational setup. Contractor should outline specific Milestones and detailed deliverables for each Milestone in the Technical Approach section of Contractor’s RFP response.

### **3 Disbursement Criteria**

USAC will disburse the percentage of the Fees associated with each Milestone upon determining that Contractor has met all obligations and requirements associated with a given Milestone. Details of Milestone acceptance will be mutually agreed upon in the Contract.

If USAC accepts that Contractor has completed all obligations associated with a given Milestone on time, USAC will disburse 100% of the payment associated with that Milestone. If such acceptance is delayed at all past the relevant deadline up to seven (7) business days, USAC will disburse eighty percent (80%) of the payment associated with that Milestone. Further, if such acceptance is delayed by more than seven (7) business days past the relevant deadline, USAC will disburse only fifty percent (50%) of the payment associated with that Milestone.