

USAC SOLICITATION FOR

Robotics Process Automation (RPA)

CONTRACT INFORMATION:

Method of Solicitation: Request for Proposal (RFP)
Award Effective Date: TBD
Contract Period of Performance: Initial Term: Effective Date – 12/31/2021;
 Three (3) 12 Month Options
Solicitation Number: HC-20-140
Solicitation Issue Date: November 25, 2020
Offer Due Date: December 29, 2020

CONTRACT TO BE ISSUED BY:

Universal Service Administrative Co.
 700 12th Street NW, Suite 900
 Washington, DC 20005

USAC RFP PRIMARY CONTACT:

USAC CONTACT INFORMATION	OFFEROR CONTACT INFORMATION
Ecatarina Grant Senior Procurement Specialist P: 202-772-4544 E: ecatarina.grant@usac.org rfp@usa.org	(complete) Name: _____ POC: _____ POC Title: _____ POC Phone: _____ POC Email: _____ Address: _____

OFFEROR SIGNATURE

 Name and Title

 Date

(RFP) COVER PAGE

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1 INTRODUCTION

USAC's is seeking a qualified contractor to provide a tool and services to implement Robotic Process Automation (RPA) to accomplish USAC High Cost's strategic objective of implementing RPA to enable it to automate structured repetitive tasks to minimize manual intervention and introduce process efficiencies (Solution).

1.1 **Background**

USAC is the administrator for the Federal Communications Commission (FCC) universal service programs. The goal of the universal service programs is to ensure that all Americans have access to robust, affordable broadband and voice services. USAC administers the Universal Service Fund (USF) under the oversight of the FCC, consistent with section 254 of the Communications Act of 1934, as amended, 47 U.S.C. § 254; Part 54 of the Code of Federal Regulations; orders, written directives, and other instructions promulgated by the FCC; and other laws as applicable, including government and FCC accounting requirements. As part of its duties and subject to the FCC's rules and oversight, USAC bills contributors to the USF, collects USF contributions, and disburses universal service support payments through the following four programs:

1. The High Cost Program: provides support for connectivity in rural and underserved communities
2. The Lifeline Program: provides support to low-income consumers
3. The Rural Health Care Program: provides support for rural health care providers; and
4. The E-rate Program: provides support to eligible schools and libraries and a consortia of eligible schools and libraries.

1.2 **High Cost Current State**

The High Cost Program (HC) is dedicated to preserving and advancing voice and broadband service, both fixed and mobile, in rural areas of the United States. The Program ensures that rates for broadband and voice services are reasonably comparable in every region of the U.S. Like all USF programs, the administration of the HC has undergone significant modernization in the last several years to increase innovation and ensure beneficiaries have access to updated technology.

The HC Verifications team reviews evidence submitted by carriers as proof of deployment and performance obligations to ensure providers are building out broadband networks and providing the quality of experience to the subscribers as intended. This work is defined as "Verifications". The upcoming FCC 5G order requires HC Verifications team to ensure accuracy of provider's broadband deployment coverage maps in conformance with Radio Frequency (RF) standards adding another layer of complexity.

Throughout the Verification process, the Verifications team performs a variety of extensive manual processes including message exchanges with carriers, requesting supporting

documentation that is both structured and unstructured in nature, applying a fail or pass status to geo-coded locations and managing varying procedures and personnel.

In addition to the location deployment data, the High Cost's Broadband Portal (HCBP) collects annual location certification data due in March each year, pre-testing performance measures data (due every quarter) and test performance data (due every year). The location validation and Verification results coupled with annual certification data support continued carrier funding eligibility.

The HC Verifications team also validates the FCC Form 481, that carriers file annually, by performing "limited" financial data audits and ensuring carriers attach the right information as part of the annual certification.

The majority of the overall Verification process is manual and labor intensive, resulting in long cycle times for each process step. Metrics and statistical reporting are also manual processes, contributing to lengthy timelines and increasing the risk of user error.

With the rapidly growing number of locations that need to be verified and to satisfy the demand for program reviews, the Verifications team has also embarked on a streamlining initiative to innovate the overall CAF Verification method including eliminating waste in processes. This RFP summarized deliverables includes developing Verification workflows using Appian, our in-house workflow tool capabilities, standardizing evidence etc., robotic process automation (RPA), and outsourcing the resulting non-automated manual verification process to a managed services vendor.

USAC has created a notional roadmap and description of implementation cycles in **Attachment 4 (Notional Roadmap)**. USAC expects to work closely with Contractor to refine this schedule based on the analysis completed over time. Implementations and analysis may overlap with one another to meet target dates. USAC will need operations and maintenance support (O&M) for the Solution beginning with acceptance of all work associated from the initial implementation.

1.3 Goals

The Contractor shall possess expertise with core RPA automation functions and fulfill RPA Performance based Service Level Agreement (SLA) requirements (see **Attachment 3**). USAC will manage Contractor relationships and define SLA metrics for core RPA automation work with clear timelines and budget implications (including incentives/credits).¹

Contractor shall specify RPA technologies that will work within the USAC environment and then provide a Solution that can aid the Verifications team with the following:

¹ See **Attachment 3** for the RPA SLA metrics; **Attachment 10** has the RPA Automation SLA Detail Requirements, **Attachment 12** has the Incentives Framework, **Attachment 4** Notional Roadmap and **Attachment 13** RPA Verification Description and Outcome

1. Generate statistically significant samples based on carrier/state/study area code combinations and then notify stakeholders external parties (carriers) indicating that the samples are ready for them to provide evidence;
2. Automate large volume email transactions and metrics generation that are currently done manually;
3. Populate Verification tracking documents and workflow tracking (milestone monitoring, process questionnaire, announcement letters, Verification status and project updates);
4. Perform automated Verifications of evidence submitted by carriers in numerous formats (including GIS data) ; and
5. Synthesize data to find patterns and commonalities to arrive at an optimal process design and store failure rates by carrier/year/fund. This would aid Verification team to make decisions in subsequent reviews since the FCC for adjusting the failure rates accepts that. This needs to be written more specifically to be considered a specified deliverable.

The goals and objectives of this project are to:

1. Develop and implement a Solution that meets the core requirements of a traditional RPA system, and meets USAC specific functional requirements.
2. Add incremental capability enhancements that achieve the HC vision for a fully automated process by 2023.
3. Deliver consistent information to drive decision-making. Establish an end-to-end solution that provides timely, accurate, and consistent information to drive more process automation. That includes a single, secure RPA platform for automation of repetitive/administrative processes, related software and RPA configuration support, operations and maintenance and program management services
4. Reduce operational risk, eliminate manual transactional processing, automate manual, repetitive, and rule based processes. Improve functionality, speed, accuracy, and ease of use for users.

1.4 Company Profile

USAC is a not-for-profit Delaware corporation, which works under the oversight of the Federal Communications Commission (FCC). USAC is not a federal agency, a government corporation, a government controlled corporation or other establishment in the Executive Branch of the United States Government. USAC is not a contractor to the Federal Government. The Contract that may be awarded as a result of this RFP will not be a subcontract under a Federal prime contract.

USAC does, however, conduct its procurement activities in accordance with the terms of a Memorandum of Understanding with the FCC, which requires USAC to adhere to the following provisions from the Code of Federal Regulations: 2 C.F.R. §§ 200.318-321; 200.323; 200.325-326 and App. II to C.F.R. Part 200. Additionally, any confidential or proprietary information received from or disclosed by Contractor to USAC is subject to disclosure under the Freedom of Information Act. Information systems at USAC, including the solution proposed by the Contractor, must be compliant with Federal Information Security Management Act (FISMA)

security requirements as a system managing Federal Funds and interfacing with Department of Treasury systems.

1.5 Place of Performance

- A. All required Contract Services, must be performed within the United States at either USAC's headquarters at 700 12th Street NW, Suite 900, Washington, DC 20005 (USAC Headquarters), virtually, or such other location as USAC may approve in its sole discretion.
- B. A Contract Kick-off Meeting may be held at USAC Headquarters or virtually. Status and other meetings may be held telephonically or in person, at USAC's discretion. USAC will not reimburse Contractor for any travel related expenses for kick-off, status, and other meetings.
- C. Services requiring work at USAC Headquarters, will include appropriate work space and appropriate access to USAC's computer network. **NOTE: To access USAC IT Systems, Contractor must sign USAC's IT Security Rules of Behavior Form and complete mandatory IT Security and Privacy Awareness Online Training.**
- D. Status update meetings and other meetings may be held virtually, except to the extent that USAC or the Contractor requires in-person presence and in accordance with USAC and Contractor Continuity of Operations Plan (COOP). While attending USAC Headquarters for meetings or to conduct audits, Contractor staff will be considered as visitors. All visitors are required to complete USAC's Visitor Form, [USAC Visitor Form](#), and wear a badge while on premises. The Contract kick-off meeting and all in-person meetings will be held at USAC Headquarters or other reasonable locations designated by USAC. Contractor may also be required to attend meetings at the FCC Offices located at 445 12th St SW Washington, DC 20554.
- E. Upon written request by USAC, Contractor shall provide a COOP including business continuity plans, disaster recovery plans, emergency operations plan and procedures, and associated plans and procedures in the event performance must be conducted virtually.

1.6 Confidentiality

This RFP and any resultant contract is subject to the terms found in **Attachment 6 (Confidentiality Agreement)** to this RFP, which must be executed by offeror and submitted along with any proposal to this RFP.

2 CONTRACT / PRICING STRUCTURE

2.1 Definitions

- A. Contract Term means the period of time encompassing the Initial Term and any Optional Maintenance Terms, Optional Licensing and Hosting Terms and Optional Managed Services Terms.

- B. Enhancement means a Modification to a prior release phase(s) that requires more than one sprint of three (3) weeks to deploy.
- C. Hosting means the infrastructure hosting and maintenance, which provides the servers upon which the Solution will be installed, and maintains the servers, databases, and code. This includes activities around platform administration, security patches, property changes, product patch deployments, system upgrades, and disaster recovery testing and backups.
- D. Hyper care means the monitoring of robots (and the process) in production for a period of two weeks to correct any remaining issues until a high level of reliability is reached, track and report on metrics and SLAs, and document lessons learned.
- E. Initial Term means the period of time from the Effective Date of the Contract to December 31, 2021. The initial term includes Project Management, the Implementation of the RPA, O&M, as well as the applicable Licensing and Hosting.
- F. Licensing means to procure, provide, and keep updated the software licenses for cloud services required for the operation of the Solution, including all environments, data, and support services.
- G. Maintenance Services means the operation and maintenance of the software/application such as system monitoring, issue resolution, application administration including upgrade support, Modifications requiring less than three (3) weeks to deploy and helpdesk services.
- H. Managed Services are defined in Attachment 9.
- I. Modification is the improvement of the system to handle new business problems, new technical problems, or new technology requirements.
- J. Optional Hosting and (or &) Licensing Term means the period of time that USAC may obtain Hosting and/ or Licensing pursuant to **the Statement of Work (see Attachment 8)**. If USAC enters into an Optional Hosting & Licensing Term in calendar year 2021, the term of that Optional Hosting & Licensing Term shall end on December 31, 2022. If USAC enters into additional Optional Hosting & Licensing Term, the term shall be from January 1 to December 31 of the applicable year. USAC shall have up to three (3) Optional Hosting & Licensing Terms.
- K. Optional Managed Services Term means the period of time that USAC may obtain Managed Services pursuant to **Attachment 9** USAC may, at its option and in its sole discretion, enter into an Optional Managed Services Term with Contractor. If USAC enters into an Optional Managed Services Term in calendar year 2021, the term of that Optional Managed Services Term shall end on December 31, 2022. If USAC enters into additional Optional Managed Services Terms, the term shall be from January 1 to December 31 of the applicable year. USAC shall have up to three (3) Optional Managed Services Terms.

L. Optional Maintenance Term means the period of time that USAC may obtain Maintenance Services pursuant to **the Statement of Work (see Attachment 8)** USAC may, at its option and in its sole discretion, enter into an Optional Maintenance Term with Contractor. If USAC enters into an Optional Maintenance Term in calendar year 2021, the term of that Optional Maintenance Term shall end on December 31, 2022. If USAC enters into additional Optional Maintenance Terms, the term shall be from January 1 to December 31 of the applicable year. USAC shall have up to three (3) Optional Maintenance Terms.

M. Sustainment Period means the 90 day monitoring period after a release to detected defects and/or bugs.

2.2 Single Contractor

USAC intends to award a contract to a single contractor. The Contractor must be willing to enter into a contract with USAC for a term of multiple years, with no pricing structure increases during the term of the agreement. Please include a cost breakdown of any software, hardware, and services required to implement and maintain the proposed Solution. If product licensing is to be involved, indicate consequent ongoing costs such as maintenance, support, et al., over the course of a maximum of four (4) years. Contractor may, during the life of the contract, offer lower pricing if and when opportunity and circumstance so permit.

2.3 Contract Term

The contract term shall be for the Initial Term and any extensions that USAC opts to execute. USAC may opt to extend the Initial Term for up to three (3) additional 12 month option years in writing. Each extension may include an Optional Maintenance Term, an Optional Licensing and Hosting Term and/or an Optional Managed Services Term. Unless extended as provided in the paragraph of this Section 2.3 or amended in writing, the contract term will not extend beyond December 31, 2024.

The Contract shall have an implementation term of the Contract Effective Date (“CED”) to March 1, 2022. All implementation activities shall take place during this term.

USAC may require continued performance of any Services beyond the expiration of Contract Term, or any period included in the Term, within the limits and at the rates specified in the Contract. USAC may extend the services more than once, but the total extension of performance hereunder shall not exceed six (6) months.

2.4 Licensing and Hosting.

During the Initial Term, Contractor shall procure and provide licenses to develop, test, and operate the Solution, and provide cloud-based hosting of the Solution.

USAC may, at its option and its sole discretion, extend the Licensing and Hosting beyond the Initial Term by exercising an Optional Maintenance Term. USAC must notify Contractor in a

signed writing of its intention to exercise such an Optional Maintenance Term no later than ninety (90) days prior to the expiration of the Initial Term or Optional Maintenance Term.

In the event that USAC does not exercise its option for an Optional Hosting and Licensing Term, Contractor, pursuant to the Contract, shall cooperate with USAC and promptly take all steps required to assist USAC in independently procuring any software that Contractor uses as part of the Solution that is licensed by Contractor from a third party (Third Party Software), including resale of Third Party Software in the event Contractor acts as a reseller of Third Party Software or extension or assignment of software licenses to the extent applicable and permitted by their terms. Contractor represents and warrants to USAC that all Third Party Software used as part of the Solution is commercially available as of the Effective Date, and also as of the Effective Date, Contractor has no reason to believe that such Third Party Software will become unavailable in the future except in the event of bankruptcy, insolvency, or discontinuation of product offerings. Contractor hereby acknowledges and agrees that USAC may independently procure/license any Third Party Software used as part of the Solution identified in Contractor's proposal.

2.5 Enhancements.

USAC may, at its option and in its sole discretion, execute an option for an Enhancement.

USAC may require Enhancements to the Solution based on new business needs, including but not limited to, federal regulatory and FCC orders changes. Application enhancements may be requested in response to changes and additions in USAC business requirements. The Contractor shall assist in requirement analysis, designing, developing, testing, and implementing Enhancements. Modifications or changes to system that require no more than a three (3) week sprint implementation time shall be part of Maintenance Services.

2.6 Maintenance Services

USAC may, at its option and in its sole discretion, execute an Optional Maintenance Term in order to receive Maintenance Services in accordance with **Attachment 8 (Statement of Work)**, including, but not limited to, providing updates to the Software in the Solution.

USAC must notify Contractor of its intention to exercise an Optional Maintenance Term at least ninety (90) days prior to the end of the Initial Term or then current Optional Maintenance Term.

2.7 Pricing

USAC anticipates that the Contract will have a hybrid fee structure of firm fixed price (FFP) and fixed unit price (FUP) as described below. The Contract will be divided into five (5) distinct contract line item numbers (CLIN) and will be priced separately (CLIN 1-4, Sections 2.8.a.-d. below) are required and CLIN 5 (Section 2.8.e. below) is an optional CLIN, to be executed at USAC's sole discretion. These tasks are detailed below and in the SOW (Attachment 8)

USAC intends to award one contract under this procurement. USAC anticipates CLINs 1-4 (as described below) will be FFP. CLIN 5 may be proposed as either fixed price or fixed unit based on the Offeror's proposal. The FFP and/or the FUP rates must be fully burdened and include all wages, overhead, general and administrative expenses, taxes and profit for each category of labor.

In order to obtain the best value for USAC, USAC requests that bidders provide pricing in accordance with **Attachment 1 (Bid Sheet)**. Bidders are encouraged to present additional creative pricing options, along with any assumptions, that may prove best value for USAC.

a. Contract Project Management (CLIN 001)

For the Initial Term, Hosting and Licensing Terms and Optional Maintenance Terms, Contractor shall provide Project Management at a FFP. Project Management includes any costs associated with **Attachment 8 (Statement of Work)**, Section 1.2.1 and shall align with the Project Management Institute's Standards and Body of Knowledge Guide.

b. Licensing and Hosting (CLIN 002)

For the Initial Term, Contractor shall procure and provide licenses to develop, test, and operate the Solution, and provide cloud-based hosting of the solution at a FFP.

Contractor will provide a FFP for Licensing and Hosting for each Hosting and Licensing Term by year in its proposal.

c. Enhancements (CLIN 003)

Contractor will provide a FFP for up to five (5) Enhancements for the Initial Term and each awarded Optional Maintenance Term / Optional Hosting and Licensing Term / Optional Managed Services Term based on the assumption that each Enhancement will have a medium level of complexity and cover two (2) sprints over six (6) weeks.

If USAC requires additional Enhancements, such Enhancements will be prepared on a FUP basis at the labor rates Contractor has provided.

Any work that requires less than one (1) sprint over three (3) weeks shall be considered part of Maintenance Services.

d. Maintenance Services (CLIN 004)

Contractor will provide a FFP for Maintenance Services by year for each Optional Maintenance Term in its proposal.

e. Optional Managed Services (CLIN 005)

USAC may require additional support as it becomes familiar with the new system and finalizes operational activities. This work shall be deemed Optional Managed Services. See **Attachment 9** for description of the Optional Managed Services.

2.8 Service Level Credits

USAC anticipates attaching service level credits of at least five percent (5%) of fees for failing to reach agreed upon goals for any critical service levels (i.e. CSLAs) within each billing period. Details of service level credits and definitions of service levels are defined in **Attachment 3 (SLA Template)**.

2.9 Award Fee Incentives for Quality Performance

For each implementation, the total FFP will be allocated across milestones set by USAC and proposed by Contractor and agreed upon at contract signing in accordance with **Attachment 12 (Milestones)**. USAC will pay 85% of the FFP upon acceptance of each milestone. Fifteen percent (15%) of the applicable FFP at each milestone (the “Award Fee”) will be at-risk.

2.10 Award Fee Acceptance Criteria

USAC will determine the amount of the Award Fee payable to Contractor for any given milestone as described in **Attachment 12 (Milestones)**. If USAC accepts a milestone on or before the date that Contractor was scheduled to deliver it to USAC, Contractor shall receive 100% of the Award Fee. If USAC cannot accept a milestone on or before the deadline for the milestone, the Award Fee will be decreased by 1/20 for each day late that the acceptance for the milestone is, such that if USAC has not accepted a milestone within 20 days of the deadline, no Award Fee will be awarded. In the case of delays caused by USAC, the deadline will be delayed one day for each day of delay caused by USAC.

3 SCOPE OF SERVICES

The Scope of Services can be found in **Attachment 8 (Statement of Work)**.

4 MEETINGS

4.1 Project Kick-off Meeting

Contractor shall schedule, prepare an agenda and coordinate a Project Kick-Off Meeting to be held at USAC’s offices within five (5) calendar days of execution of the Contract. USAC may include any additional items on the agenda it deems necessary. The Project Kick-Off Meeting is intended to serve as an introduction between Contractor, Contractor’s personnel that will perform the services set forth herein, and USAC personnel who will be involved with the project. The meeting shall provide the forum to discuss the project, approach and schedule, technical or business questions, project roles, responsibilities of the respective parties, and any project communications. Attendees at this meeting shall also include Contractor’s Proxy Product Owner and all Key Personnel, USAC’s technical representatives, and any other attendees designated by USAC, including key representatives from the FCC. USAC will not reimburse Contractor for any travel related expenses.

4.2 Monthly Steering Committee

Contractor shall schedule, prepare an agenda and coordinate monthly meeting with USAC / FCC governance body (likely containing Executive leadership, USAC CFO, USAC CIO, and FCC representatives). Meetings should include project status updates, product demos, a summary of challenges experienced by Contractor in performing its duties, including alternative strategies for accomplishing its tasks, as appropriate.

4.3 Regular Sprint Reviews

Contractor shall report on progress and percentage completion of sprint deliverables (e.g., stories) after each sprint to the USAC project management team. USAC and Contractor will collaborate on planning deliverables for next and future sprints as solution is developed. Code demonstrations are required at the end of each sprint.

5 OPERATIONS

5.1 Responsibilities and Requirements of Contractor

The primary responsibilities and requirements of Contractor are identified below.

- A. Contractor and its reviewers, staff and employees working on the USAC account shall be located within the United States.
- B. Contractor shall operate its facility in accordance with all federal and state laws and regulations, to include compliance with any accessibility-related requirements (e.g., Section 508 compliance).
- C. Contractor shall be responsible for all work performed by any subcontractors.
- D. Contractor shall ensure that the following are reported to USAC and included in any invoice:
 - 1. Name and address of Contractor;
 - 2. Invoice date, number and period of performance;
 - 3. Contract number
 - 4. Name and address of official to whom payment is to be sent or to notify in event of invoice or payment issues; and
 - 5. Any other substantiating documentation or information as reasonably required by USAC.

6 **PERFORMANCE**

6.1 **Performance Standards**

USAC expects Contractor to perform to a high standard and deliver work of consistently high quality. In order to ensure that Contractor meets USAC's expectations, USAC intends to measure Contractor's performance against a variety of SLAs. The proposed SLAs are listed in **Attachment 3 (SLA Template)**.

6.2 **Continuous Improvement Standards**

The primary continuous improvement (CI) responsibilities and requirements of Contractor are identified below.

- 6.2.1 Contractor shall stand up a CI team with clear governance for the entire CI process, as agreed to by USAC.
- 6.2.2 Contractor shall stand up a process to collect feedback from key stakeholders to be approved by USAC before launch.
- 6.2.3 Contractor shall facilitate alignment among stakeholders at USAC on CI objectives.
- 6.2.4 Contractor shall define and quantify expected and measurable quality and efficiency benefits of improvement initiatives.
- 6.2.5 Contractor shall set up regular monthly meetings to review the improvement initiatives and their measurable impact.
- 6.2.6 Contractor shall assess the initiatives and plan for the implementation of selected initiatives.
- 6.2.7 Contractor shall track and publish the measured impact of implemented initiatives to USAC.

7 **SECURITY**

7.1 **Data Safeguards**

In providing the Services, Contractor shall conduct itself in a manner that safeguards USAC Data against destruction, loss, damage, corruption, alteration, loss of integrity, commingling, or unauthorized access or Processing (the "Data Safeguards"), which Data Safeguards shall be no less rigorous than the most protective of (a) the requirements of applicable Law; (b) the specific standards set forth in this Article 7; (c) the applicable USAC Standards relating to data security (including such standards and procedures relating to quality, change, and problem management, safety, data privacy and data security, and disaster recovery), as set forth in **Attachment 7**

(Security and Confidentiality Procedures). Each Party shall designate an individual responsible for coordinating data security related matters for such Party, who will be the primary contact person of such party for all data security related matters under the Contract.

7.2 FedRAMP

In the event that Cloud-based services shall be employed by Contractor and interact with USAC data, Contractor shall provide documentation and proof of accreditation to demonstrate compliance and shall be certified by the Federal Risk and Authorization Management Program (FedRAMP), or equivalent authorization, for use at a moderate risk, prior to milestone: Launch. USAC reserves the right to inspect the ATO notice for services certified by the FedRAMP Joint Accreditation Board (JAB) or the complete package of documents for those with agency accreditations. To demonstrate compliance, Contractor shall provide FedRAMP Security Authorization Package, or equivalent authorization, to USAC to include (but not limited to): System Security Plan (SSP), Security Assessment Report (SAR), Plan of Action and milestones (POA&M), Authority to Operate (ATO) Authority Official signed Memo, Contingency Planning (CP) documentation, and Continuous Monitoring Plan. Contingency Planning (CP) documentation to include (but not limited to): Information System Contingency Plan (ISCP), Business Continuity Plan (BCP), Business Impact Analysis (BIA), and Continuity of Operations Plan (COOP). USAC prefers that Contractor host the solution in a FedRAMP accredited, government cloud-based environment. Regardless of hosting approach, the solution must be able to achieve FISMA accreditation prior to going live.

7.3 Personally Identifiable Information (PII)

Contractor's information systems, applications and processes shall be approved by USAC's Security Team. Contractor shall write, review, and update an assessment of all applicable Federal mandates, including, but not limited to FISMA and most recently released revision of NIST 800-53, Revision 5 or later revision (Security and Privacy Controls for federal Information Systems and Organizations), including Appendix J, NIST privacy controls – or the most current revisions of the aforementioned documents, to ensure adherence to NIST, FISMA, OMB, FCC, USAC, and other industry-accepted standards. Data and documentation collected will include personally identifiable information (PII), including names, addresses, email addresses, phone numbers and commercial banking information and other confidential business information. PII shall be protected in accordance with all federal and USAC requirements, including, but not limited to, the most current revision of the following: OMB Circular No. A-130, OMB Memoranda M-06-16 and guidance from the NIST, including NIST SP 800-53 Rev. 4 (Security and Privacy controls for Federal Information Systems and Organizations) and NIST SP 800-122 (Guide to Protecting the Confidentiality of Personally Identifiable Information) – or the most current revisions of the aforementioned documents. All privacy and/or security-related incidents including, but not limited to, the disclosure of PII, shall be tracked in accordance with policy standards as outlined in the Incident Response (IR) controls documented in most recently released revision of NIST 800-53, Revision 5 or later revision and NIST SP 800-61 and consistent with the requirements of OMB Memoranda M-17-12 – or the most current revisions of the aforementioned documents. The Incident Response Plan (IRP) shall include reporting to USAC's Privacy Officer and to USAC's Director of Information Security or designated

representative within one (1) hour of any breach or suspected breach of PII. Failure to notify USAC's aforementioned representatives will result in USAC receiving a service level credit outlined in **Attachment 10**.

7.4 Encryption and Secure Storage

Contractor shall ensure that USAC Data, Confidential Information, and PII are encrypted at all times in accordance with Federal Information Processing Standards (FIPS) 140-2 standards. This encryption requirement includes both Data at Rest (i.e., stored on a hard drive, CD, DVD, thumb drive, etc.) and Data in Transit (i.e., via email or other electronic means). Any PII that is retained in any formats must be stored in a secured location and with limited access. The standard for disposal of PII requires practices that are adequate to protect against unauthorized access or use of the PII, including at minimum shredding or burning papers containing PII and securely erasing (using U.S. Department of Defense standards or the equivalent) electronic files and other media containing PII.

7.5 Contractor Vulnerabilities

Contractor shall address vulnerabilities in accordance with NIST vulnerability management controls. Contractor shall address vulnerabilities in the applicable timeframes set forth in such policies. Contractor shall provide a monthly vulnerability report and a risk mitigation plan to address any identified vulnerabilities. Critical and high vulnerabilities shall be reported to the USAC Chief Information Security Officer (CISO), or designee, and mitigated within thirty (30) days of being identified. In the event that Contractor cannot meet the applicable timeframe, Contractor shall provide USAC a plan of action and develop milestones to address such vulnerabilities promptly, and shall prioritize remediation based on the risks implicated by such vulnerabilities. Failure to meet the applicable timeframe will also result in USAC receiving a service level credit outlined in **Attachment 3**.

7.6 Further Requirements

Contractor's Services, and Contractor's applications, processes and systems used in the provisioning of Services, shall be approved by USAC's IT Security Team and shall comply with FISMA, NIST, and OMB requirements.

7.7 Notification and Assistance

Contractor shall cooperate with USAC in any litigation and investigation against third parties deemed necessary by USAC to protect USAC Data, other USAC Confidential Information and/or PII. Each Party will bear the costs it incurs as a result of compliance with this Section.

8 INSTRUCTIONS AND EVALUATION CRITERIA

8.1 Contract Terms and Conditions Sheet

The Contract awarded as a result of this RFP will be governed by, and subject to, terms and conditions closely based upon the Terms and Conditions Sheet set forth in **Attachment 2 (Terms and Conditions)** and all attachments herein. Offeror's submission of a proposal constitutes its agreement to the Terms and Conditions and their precedence over any other terms, requirements, or conditions proposed by offeror.

Offeror's proposal shall identify deviations from, or revisions, exceptions or additional terms (collectively "exceptions") to the Terms and Conditions Sheet, but only if such exceptions are clearly identified in a separate **Attachment B** to Volume II, "Exceptions to RFP Terms." Proposals that include material exceptions to the Terms and Conditions may be considered unacceptable and render Offeror ineligible for award unless the Offeror withdraws or modifies any unacceptable exceptions prior to USAC's selection of the successful Offeror for award. USAC will only review changes or additions to the Terms and Conditions that are included in Offeror's proposal. After selection of the awardee, USAC will not consider or negotiate any exceptions to the Terms and Conditions.

8.2 Period of Acceptance of Offers

Offeror's shall ensure that its proposal remains valid for 120 calendar days from the date specified for receipt of offers, unless another time period is specified in an addendum to the solicitation.

Offeror's shall ensure that its proposal:

- A. Concisely address USAC's requirements, as set forth in this RFP, and should not contain a significant amount of corporate boilerplate marketing information.
- B. Is submitted to USAC Procurement Department no later than 11:00 AM ET on December 18, 2020 ("Proposal Due Date").
- C. Is submitted in the form of one electronic copy submitted to rfp@usac.org. The subject line for all email communication related to this solicitation should **only** state the Solicitation Number of this RFP.

To be timely, Offeror's proposal must be received by USAC by the proposal due date at the email address specified above. Any offer, modification, revision, or withdrawal of an offer received at the USAC office designated in the solicitation after the proposal due date and time is "late" and will not be considered by USAC, unless USAC determines, in its sole discretion, that circumstances beyond the control of Contractor prevented timely submission, consideration of the offer is in the best interest of USAC, or the offer is the only proposal received by USAC. Proposals, once submitted, cannot be withdrawn for 120 calendar days from the date specified for receipt of offers, except with the written consent of USAC.

8.3 Submission of Questions

USAC will only accept **written questions** regarding the RFP. All questions must be emailed to rfp@usac.org no later than December 4, 2020, 11:00 AM Eastern Time (ET). USAC plans to

post all questions and responses under this procurement on our website on December 11, 2020 4:00 PM ET.

8.4 Amend, Revise, or Cancel RFP

USAC reserves the right to amend, revise or cancel this RFP at any time at the sole discretion of USAC and no legal or other obligations are assumed by USAC by virtue of the issuance of this RFP, including payment of any proposal costs or expenses, or any commitment to procure the services sought herein.

8.5 Documentation Requirements

Each document deliverable shall be submitted in an acceptable electronic unprotected format, using Microsoft® Excel, Microsoft® Word, Microsoft® Project Professional, PDF, or any other format that is mutually agreed upon by USAC and Contractor.

8.6 RFP Key Dates

DATE	EVENT
November 25, 2020	RFP Released
December 4, 2020	Questions Due to USAC by 11:00 AM ET at rfp@usac.org
December 11, 2020	Answers posted by USAC
December 29, 2020	Proposal Due to USAC by 11:00 AM ET at rfp@usac.org
January 22 and 25, 2020	Proof of Concept Demonstrations / Vendor Discussions
January 29, 2020	Final Proposal Revisions and Best and Final Offers Due by 11:00 AM ET at rfp@usac.org
February 5, 2020	Contract Negotiations
February 12, 2020	Anticipated Award Date

8.7 Contract Award

USAC will evaluate proposals and may award a contract resulting from this solicitation to the Contractor whose offer will be most advantageous to USAC. USAC may reject any or all offers if such action is in the public's or USAC's interest; accept other than the lowest offers; and waive informalities and minor irregularities in offers received.

8.8 Identification of Confidential Information

Offeror's proposal shall clearly and conspicuously identify information contained in the proposal that Contractor contends is confidential information.

All deliverables submitted by Contractor to USAC are considered Confidential Information of USAC and are the sole property of USAC. USAC may use, copy, distribute or disclose the deliverables in its sole discretion.

8.9 Proposal Cover Page

Offeror's must ensure that its proposal contains a cover page which includes the following information:

- A. The name of Offeror's organization;
- B. Offeror's contact name;
- C. Offeror's contact information (address, telephone number, email address, website address);
- D. Offeror's DUNS number;
- E. The date of submittal;
- F. A statement verifying the proposal is valid for a period of 120 days; and
- G. The signature of a duly authorized offeror representative.

8.10 Proposal Content

A. Offeror's proposal shall be comprised of the following four (4) volumes. All text shall be 12 point font size, and page limits shall be followed as indicated.

1. Corporate information (Volume I) – Limit to two (2) single-spaced pages
2. Offeror should provide a summary of any corporate information relevant to this RFP, which should include, at minimum:
 - a. Length of time in software development business
 - b. Place(s) of incorporation of business
 - c. Place(s) where offeror conducts business, including primary place of business
 - d. Percentage and number of relevant employees/contractors in the U.S. and any other countries

B. Technical (Volume II) – Word / page limits as indicated per section

1. Differentiators: Offeror shall provide a brief summary of its qualifications to undertake development of the RPA Solution including any unique differentiators. *This summary should be no more than 250 words.*
2. Summary of solution approach: Offeror shall submit a summary of the approach for implementation of the RPA Solution. *This summary should be no longer than eight (8) single-spaced pages of text including any diagrams.*
 - a. General RPA software solution functionalities - intuitive Graphical User Interface (GUI) and easy to use drag and drop interfaces, rich analytical suite, less script or script-less automation, process structured and especially unstructured documentation, GIS and mapping capabilities, scale seamlessly to large volumes, and seamless integration into the USAC environment;



- b. Discuss end-to-end solution delivery capabilities, Verification reviews, and expertise in gradually building an in-house knowledge base that can be sustained by USAC personnel;
 - c. Discuss the implementation approach and Offeror's plan to meet or exceed USAC's requirements;
 - d. Discuss how the solution is auditable and traceable – audit logs, audit trails and versioning for regulatory audit requirements;
 - e. Security – security standards, full FISMA and FedRAMP compliance is required, per **Attachment 7**; minimum FedRAMP compliance required is Moderate;
 - f. Environmental considerations (e.g. knowledge base). The knowledge base may reside outside or within the RPA application;
 - g. Key Performance Indicators (KPI)s – standard KPIs that are part of the tool and the ease of configuration;
 - h. Risk considerations - technical readiness (platform agnostic), product maturity, deployment considerations;
 - i. Telecom – provisioning, equipment inventories, GIS and mapping capability from a Telco perspective, knowledge of telecom billing standards, CMMI certification, auditing and regulatory compliance. Knowledge of these telecom areas might be beneficial in identifying how RPA could most effectively contribute to the Verification process.
 - j. Agile and DevOps approaches to building RPA solutions.
 - k. Discuss experience providing Managed Services support for completing manual review.
 - l. Discuss Contractor's Managed Services approach to how manual verifications will be supported to include staffing model, training, and manual review timeline.
3. Terms and Conditions response: Offeror shall include a markup of **Attachment 2 (Terms and Conditions)** attached hereto as, showing any proposed modifications in track changes format.
4. Key Personnel dedicated to Contract: As part of its RFP response, offeror shall provide resumes for each of its Key Personnel, including all roles listed in **Attachment 5 (Key Personnel)**. Contractor shall ensure that each Key Personnel is listed as fully dedicated to the project or with the percentage of expected dedication. The resume must set forth the years of relevant experience and other material information regarding each Key Personnel. *Limit each resume to 2 single-spaced pages.*

If offeror, at time of proposal and/or prior to the award of the Contract, has information that any such Key Personnel anticipate terminating his or her employment or affiliation with offeror, offeror shall identify such personnel and include the expected termination date in the proposal.

5. Technical prompts: In addition to the responses listed above, offerors shall provide short responses to the following questions, abiding by indicated word count limits:
 - a. What would be your proposed collaboration approach and working model for ensuring USAC is sufficiently involved in design, implementation and integration of



- the Solution to prevent surprises in performance and facilitate sufficient knowledge transfer so that the build will be sustainable over the long-term for USAC? Please describe if most development will be located near the USAC office. If not planning for most development to be located near the USAC office, please include any relevant information on collaboration tooling (*e.g.*, videoconferencing, screen sharing, IM). *(300 word limit)*
- b. Please include information on your SDLC or development approach and what this means for the USAC team. How would solution development within your team be managed through meetings, personnel leadership, and delivery metrics? How would your team coordinate with USAC’s Business Users and IT Teams to define business requirements and ensure high program integrity, program success, and stakeholder needs are met? Please include how you would demo that the functional requirements are met to USAC’s satisfaction. *(400 word limit)*
 - c. Training shall be provided after each deployment for staff and stakeholders. What would be your engagement plan for stakeholder training (*e.g.*, for program operations) to ensure effective usage of the Solution? Please include details that went into your cost estimates for this deliverable regarding how many trainings for how many people in which kind of format. *(250 word limit)*
- C. Past Performance information (Volume III) – Limit to ten (10) single-spaced pages including diagrams
1. Offeror shall describe three (3) to five (5) examples of similar-sized software integration projects that offeror has undertaken in the past five (5) years. It is expected that the Key Personnel provided according to **Attachment 5** (at least the proposed will have been heavily involved in at least two (2) of the provided examples of past performance.
 2. USAC will attempt to contact past performance references identified in the proposal for confirmation of the information contained in the proposal and/or will transmit a past performance questionnaire to the contacts identified in the offerors proposals. Although USAC will follow-up with the contacts, the offeror, not USAC, is responsible for ensuring that the questionnaire is completed and returned by the specified date in USAC’s transmittal. If USAC is unable to reach or obtain a reference for the project, USAC may not consider the contact in an evaluation of past performance.
- D. Price proposal (Volume IV)
- This volume must include:
1. Cover Page. A cover page, as outlined above.
 2. Pricing Information.



- a. Completed pricing information in the format of **Attachment 1 (Bid Sheet)**.
- b. Pricing structure that includes hardware, software, licensing, ratio of maintenance cost to total cost of ownership (TCO), additional costs for AI/ML components (if any);
- c. The firm fixed price should be *fully burdened* and must include wages, overhead, general and administrative expenses, travel, taxes and profit.

8.11 Evaluation Criteria

USAC will award a contract resulting from this solicitation to the responsible contractor whose offer conforming to the solicitation will be most advantageous to USAC, price and other factors considered. The following factors, which are listed in descending order of importance, shall be used to compare offers and select the contractor – Technical, Past Performance and Price. When combined, the Technical and Past Performance factors are significantly more important than Price. Additionally, offeror response to the Term Sheet and associated shift in risk to USAC will be included in overall evaluation.

A. **Technical:** The technical sub factors listed below:

1. **Technical Approach:** sophisticated specifications for core components of the system (FFP components). During evaluation (*i.e.* in-person discussions), USAC will require a demonstration of a proposed Solution in accordance with USAC requirements.
2. **Experience:** Capability of offeror to deliver the proposed solution and applicable technologies/tools.
3. **Key Personnel:** Evidence of applicable skills, whether the individuals have done similar work and if the team has worked together on prior engagements.
4. **Deliverable Planning:** High level of detail in the work plan with sufficient quality assurance activities to drive a robust delivery process with strong collaboration points.

B. **Price Evaluation:** USAC will evaluate price based on Offeror's input to **Attachment 1 (Bid Sheet)**. However, price is one of many evaluation factors, and the Contract may not be awarded to the lowest priced offeror. Price may become a more important selection factor if the ratings for the Technical and Past Performance factors are the same or very close to the same for the top-rated offerors. In addition to considering the total prices of the offerors when making the award, USAC will also evaluate whether the proposed ceiling and prices are realistic (*i.e.*, reasonably sufficient to perform the requirements) and reasonable. Proposals containing prices that are determined to be unrealistic or unreasonable will not be considered for award.

C. **Past Performance:** Past performance information will be evaluated to assess the risks associated with Offeror's performance of this effort, considering the relevance, recency

(within the past 3 years), and quality of offeror's past performance on past or current contracts for the same or similar services.

1. Past performance information should specify details across two broad areas:
 - a. System integration – build of a platform similar in nature to the required Solution, particularly previous integration, including details on speed at which deployment and process improvement occurred to reduce manual work and improve efficiency over a two year period.
 - b. Operations & Maintenance – what level of support has been provided with previous engagements?
2. This will be evaluated based on offeror's discussion of its past performance for similar efforts, information obtained from offeror's references (including detailed references for offeror's proposed teaming partner(s) and/or subcontractor(s), as applicable) and information that may be obtained from any other sources (including government databases and contracts listed in the contractor's proposal that are not identified as references).

8.12 Down-Select Process

USAC may determine that the number of proposals received in response to this RFP are too numerous to efficiently conduct a full evaluation of all evaluation factors prior to establishing a competitive range. In such a case, USAC may conduct a down-select process to eliminate offerors prior to discussions, from further consideration based on a comparative analysis of offeror proposals, with primary focus on the price proposal, but USAC may, in its sole discretion, consider other factors such as quality of proposal, technical capabilities and past performance. Proposals that include proposed prices that are significantly higher than the median proposed price for all offerors may be excluded from the competition without evaluation under the other evaluation factors. Proposals that contain prices that are unrealistically low in terms of sufficiency to perform the Contract may also be excluded from the competition.

8.13 Discussions

USAC will hold discussions, with highest rated offerors, January 21-22, 2020. Discussions will include issues related to the offeror's Technical (including information on the optional Managed Services), Past Performance, Price proposals and include a targeted demonstration of USAC provided use cases and data. Information for inclusion in discussions will be provided by USAC no later than January 18, 2020.

Offers that include material deviations from, or take material exceptions to, RFP requirements, Terms or Conditions will be evaluated as technically unacceptable and will be ineligible for award unless USAC subsequently amends the RFP to modify the requirements or, if discussions will be held, decides to address the deviations/exceptions during discussions and thereby resolves the deviations/exceptions are thereby resolved.

8.14 Final Proposal Revisions and Best and Final Offers

After conclusion of discussions, offeror's may be invited to submit final proposal revisions (FPR) and best and final offers (BAFO). At this time, offerors can make changes to its proposal submissions to address questions and concerns and competitive pricing specifically addressed in discussions. FPR and BAFO's will be due no later than January 29, 2020 at 11:00 AM ET.

8.15 Competitive Negotiation Using Best Value Selection

This solicitation will be conducted using Best Value Selection that results in an award that is most advantageous to USAC based on the best value combination of: (a) evaluated qualitative merit and (b) evaluated price (cost) of the offers submitted. Best Value Selection is based on the premise that, if all offers are of approximately equal qualitative merit, award will be made to the offeror with the lowest evaluated price (cost). However, USAC will consider awarding to an offeror with a higher evaluated price (cost) if the offer demonstrates the difference in price (cost) is commensurate with the higher qualitative merit. Conversely, USAC will consider awarding to an offeror with a lower evaluated qualitative merit if the price (cost) differential between it and other offers warrant doing so.

8.16 Responsibility Determination

USAC will only award Contracts to a responsible offeror. USAC will make a responsibility determination based on any available information, including information submitted in an offeror's proposal. In making a responsibility determination USAC will consider whether:

- A. Offeror has sufficient resources to perform the Contract;
- B. Offeror has a satisfactory record of performance, integrity and business ethics;
- C. Offeror has the accounting systems and internal controls, quality assurance processes and organizational structure and experience necessary to assure that contract work will be properly performed and accurately invoiced; and
- D. Offeror has the facilities, technical and personnel resources required to perform the Contract.

9 LEGAL NOTICES

9.1 No Offer; RFP Procedures

The issuance of this RFP does not give rise to any future intention, commitment, offer or obligation of USAC to enter into any kind of business relationship with any prospective offeror. No contract for the development and supply of RPA Services shall be formed unless and until a written definitive agreement for such development and purchase is executed by the selected offeror and USAC. Following the execution of such a definitive agreement, the only obligations of the parties thereto will be those set forth therein. For purposes of this paragraph, definitive agreements do not include any preliminary written document, or any oral agreement or course of conduct.

USAC and its representatives are free to conduct the RFP process as they determine in their sole discretion (including by negotiating with any other prospective offeror without prior notice to you or any other person). USAC reserves the right, in its sole discretion, to change any of the RFP procedures at any time, to reject any and all proposals with respect to this RFP, and to terminate discussions and negotiations related to this RFP at any time and for any or no reason. USAC also reserves the right to negotiate with those responding, or with any other person or entity, an agreement on terms which, in USAC's sole judgment, best serves its needs. USAC may seek additional information from any potential offeror after the due date.

USAC, its affiliates and its or their directors, officers, reviewers, employees or representatives do not have any legal obligation or liability of any kind to you with respect to or arising from this RFP, whether by virtue of this RFP or any other written or oral expression with respect to the RFP or otherwise.

USAC and/or its professional advisors retain all right, title and interest, including the copyright, in and to the materials provided by or on behalf of USAC or its professional advisors for the purposes of this RFP and all rights therein are reserved. All proposals submitted to USAC shall become the property of USAC and shall not be returned.

9.2 Confidential Information

Confidential Information includes, but is not limited to, information, Data, material, or communications in any form or format, whether tangible or intangible, spoken or written (collectively referred to hereafter as "Information"), that contains, reflects, or is derived from or based upon, or is related to: (1) PII, as defined by NIST Special Publication 800-122; (2) Management, business, procurement or financial Information of either party, the FCC or a USF stakeholder, including proprietary or commercial Information and trade secrets that have not previously been publicly disclosed; (3) Information concerning USAC's relationships with other vendors, the FCC, USF Stakeholders and financial institutions; (4) Information marked to indicate disclosure limitations such as "Confidential Information," "proprietary," "privileged," "not for public disclosure," "work product," etc.; (5) Information compiled, prepared or developed by offeror in the performance of this Contract; and (6) any Information identified as confidential by the disclosing party.

9.3 Conflicts

Offeror's services are in support of USAC's administration of the USF, and as such offeror will be expected to maintain the same neutrality, both in fact and in appearance, and avoid any conflict of interest or even the appearance of a conflict of interest. To the extent that prospective offeror or any offeror staff has client, membership, financial or any other material affiliation with entities that participate in the federal USF in any respect, there may be actual, potential or apparent conflict(s) of interest. Potential offerors must disclose in responses any potential conflict(s) of interest and the nature of any restriction proposed to cure the conflict(s). USAC reserves the right to restrict participation and access to confidential information by offerors that in USAC's sole discretion pose a conflict of interest in the course of this procurement action and to require disclosure of any potential conflicts of interest as a condition of receipt of Confidential Information.

9.4 Protocol

Prospective offerors should fully comply with this RFP or as otherwise communicated by USAC. Each prospective offeror should ensure that all of its employees, reviewers, counsel, advisors or other representatives involved in the RFP process are fully aware and understand the procedures set forth in this RFP and the obligations to be undertaken by the selected offeror.

No prospective offeror personnel shall contact any USAC personnel or FCC personnel in relation to this RFP, including USAC senior management and its Board of Directors, unless the USAC RFP primary contact has provided his or her prior written consent. During the period of this RFP, no contact related to this RFP should occur between any member of the prospective offerors' staff and any member of staff of USAC other than through the designated USAC RFP primary contact.

9.5 Publicity

Offeror shall not make (or cause to be made) any public announcement relating to this RFP or USAC's undertaking of this evaluation process, and shall not otherwise publicize this RFP in any manner, unless prior written consent is obtained from the USAC RFP primary contact. Additional obligations are set forth in the Confidentiality Agreement.

9.6 Costs and Expenses

Offeror is responsible for bearing all costs and expenses of preparing, submitting and (if requested by USAC) resubmitting its proposal, and any other prior or subsequent activity associated with this RFP, including the following, as applicable: evaluation of the proposal, prospective offeror presentations, meeting attendance, due diligence and/or contract negotiations and fees and expenses of any outside counsel or other advisors, regardless of whether or not USAC enters into an agreement with the prospective offeror.

9.7 Due Diligence; No Representations

The information provided by USAC as part of the RFP process is intended only as a preliminary background explanation. This RFP does not purport to be all-inclusive or to contain all information that a prospective offeror may desire or deem to be material in connection with this

RFP. In all cases, prospective offerors should conduct their own investigation and analysis. In particular, prospective offerors should consider the advice of their own financial, legal, accounting, tax and other business advisors, and such other factors which they consider appropriate, in investigating and analyzing this RFP.

The information contained in this RFP is selective and subject to being updated, expanded, revised or amended by USAC.

USAC, its affiliates and its or their directors, officers, reviewers, employees or representatives have not made or do not make any express or implied representation or warranty, or accept any responsibility for the information contained in, or provided in connection with, this RFP or its fairness, accuracy or completeness. None of them shall have any liability or otherwise to a prospective offeror relating to or resulting from use of USAC confidential information or for any errors therein or omissions therefrom (except as may otherwise be provided in a definitive written agreement signed by the parties). Prospective offerors are responsible for making their own evaluation of information and data contained in, or provided in connection with, this RFP and in preparing and submitting their proposals.

This RFP is intended to provide prospective offerors with enough information to build their proposals, but it is the prospective offerors' responsibility to request any additional information that it reasonably believes it may need in connection with this RFP. The prospective offeror selected by USAC must complete its due diligence prior to entering into a Contract with USAC. Any contract between the parties will not contain provisions providing for post-signing due diligence or any related pricing adjustments.

10 **ATTACHMENTS**

- 10.1 **Attachment 1: Bid Sheet**
- 10.2 **Attachment 2: Terms and Conditions**
- 10.3 **Attachment 3: SLA Template**
- 10.4 **Attachment 4: Notional Roadmap**
- 10.5 **Attachment 5: List of Key Personnel**
- 10.6 **Attachment 6: Confidentiality Agreement**
- 10.7 **Attachment 7: Security and Confidentiality Procedures**
- 10.8 **Attachment 8: Statement of Work**
- 10.9 **Attachment 9: Optional RPA Managed Services**
- 10.10 **Attachment 10: RPA Automation SLA Detailed Requirements**
- 10.11 **Attachment 11: Reserved**
- 10.12 **Attachment 12: Milestones**
- 10.13 **Attachment 13: RPA Verification and Outcome**