

## ATTACHMENT 9 – TRANSITION MILESTONES

### 1. Introduction

#### A. CSC Stand-up

The CSC Stand-up Milestone Plan (the "CSC Stand-up (Milestone Plan") is designed to provide economic motivation for Vendor to meet timeline requirements of the Contract during the beginning of Vendor's engagement. The intent of the Milestone Plan is to create a framework for the disbursement of the Stand-up FFP costs to be paid to Vendor. In general, the payment of any Stand-Up FFP component is contingent on compliance with contractual requirements and schedule performance to the degree specified below. There is a Stand-Up Milestone Plan to ensure the call center operation is launched timely and operating as intended, and a Stand-Up Milestone Plan to ensure the CRM system launched timely and operating as intended. The Stand-up Milestone Plan is anticipated to cover work to transition E-rate, High Cost, Rural Health Care, and Financial Operations call center operations to a new vendor, with Milestones that may be applicable to other programs to be determined at time of implementation.

#### B. CRM Operations & Maintenance

The CRM Operations & Maintenance (O&M) Transition Milestone Plan (the "CRM Transition Milestone Plan") is designed to provide economic motivation for Vendor to meet timeline requirements of the Contract during the beginning of Vendor's engagement. The intent of the Milestone Plan is to create a framework for the disbursement of the transition FFP costs to be paid to Vendor. In general, the payment of any transition FFP component is contingent on compliance with contractual requirements and schedule performance to the degree specified below. There is a Transition Milestone Plan to ensure the call center operation continues smooth operation using the CRM and ensure the CRM system is operating as intended. The Transition Milestone Plan is anticipated to cover work to transition the MS Dynamics CRM Operations & Maintenance to a new vendor.

### 2. Scheduled Milestones

#### A. CSC Stand-up

USAC and Vendor will agree to Milestones. USAC will pay the portion of the stand-up FFP applicable to each Milestone after achievement of such Milestone (as determined by USAC's acceptance). If a Milestone is not met by the due date for such Milestone, the Stand-up Fee for such Milestone specified in Attachment 1, Bid Sheet, will be reduced by (i) five percent (5%) of the Stand-up Fee for such Milestone if the Milestone is met five (5) days after the due date; (ii) ten percent (10%) of the Stand-up Fee for such Milestone is met six (6) to eight (8) days after the due date; or (iii) fifteen percent (15%) of the Stand-up Fee for such Milestone if the Milestone is met more than eight (8) days after the due date. For the avoidance of doubt, a single performance failure will only result in a single Stand-up Fee reduction pursuant to this paragraph.

Stand-Up Milestone Plan for Customer Service Center

<b>E-Rate</b>	<b>Milestone Date</b>
<b>i) Milestone #1</b> (Determined by Vendor)	mm/dd/yyyy
<b>ii) Milestone #2</b> (Training)	mm/dd/yyyy
<b>iii) Milestone #3</b> (Testing)	mm/dd/yyyy
<b>iv) Milestone #4</b> (Ready for Cutover)	12/01/2026
<b>v) Milestone #5</b> (Trial Period) 30 days from Cutover	mm/dd/yyyy
<b>vi) Milestone #6</b> (If Vendor proposes to defer certain non-critical requirements)	mm/dd/yyyy

<b>High Cost</b>	<b>Milestone Date</b>
<b>i) Milestone #1</b> (Determined by Vendor)	mm/dd/yyyy
<b>ii) Milestone #2</b> (Training)	mm/dd/yyyy
<b>iii) Milestone #3</b> (Testing)	mm/dd/yyyy
<b>iv) Milestone #4</b> (Ready for Cutover)	12/01/2026
<b>v) Milestone #5</b> (Trial Period) 30 days from Cutover	mm/dd/yyyy
<b>vi) Milestone #6</b> (If Vendor proposes to defer certain non-critical requirements)	mm/dd/yyyy

<b>Rural Health Care</b>	<b>Milestone Date</b>
<b>i) Milestone #1</b> (Determined by Vendor)	mm/dd/yyyy
<b>ii) Milestone #2</b> (Training)	mm/dd/yyyy
<b>iii) Milestone #3</b> (Testing)	mm/dd/yyyy
<b>iv) Milestone #4</b> (Ready for Cutover)	12/01/2026
<b>v) Milestone #5</b> (Trial Period) 30 days from Cutover	mm/dd/yyyy
<b>vi) Milestone #6</b> (If Vendor proposes to defer certain non-critical requirements)	mm/dd/yyyy

<b>Financial Operations</b>	<b>Milestone Date</b>
<b>i) Milestone #1</b> (Determined by Vendor)	mm/dd/yyyy
<b>ii) Milestone #2</b> (Training)	mm/dd/yyyy
<b>iii) Milestone #3</b> (Testing)	mm/dd/yyyy
<b>iv) Milestone #4</b> (Ready for Cutover)	12/01/2026
<b>v) Milestone #5</b> (Trial Period) 30 days from Cutover	mm/dd/yyyy
<b>vi) Milestone #6</b> (If Vendor proposes to defer certain non-critical requirements)	mm/dd/yyyy

**B. CRM Operations & Maintenance**

USAC and Vendor will agree to Milestones. USAC will pay the portion of the Transition FFP applicable to each Milestone after achievement of such Milestone (as determined by USAC's acceptance). If a Milestone is not met by the due date for such Milestone, the Transition Fee for such Milestone specified in Attachment 1, Bid Sheet, will be reduced by (i) five percent (5%) of the Stand-up Fee for such Milestone if the Milestone is met five (5) days after the due date; (ii) ten percent (10%) of the Stand-up Fee for such Milestone is met six (6) to eight (8) days after the due date; or (iii) fifteen percent (15%) of the Transition Fee for such Milestone if the Milestone is met more than eight (8) days after the due date. For the avoidance of doubt, a single performance failure will only result in a single Transition Fee reduction pursuant to this paragraph.

Transition Milestone Plan for the MS Dynamics CRM Operations & Maintenance

<b>CRM O&amp;M Transition</b>	<b>Milestone Date</b>
<b>i) Milestone #1</b> (Stand-up Transition Team)	mm/dd/yyyy
<b>ii) Milestone #2</b> (Understand USAC's CRM Environments and Team Responsibilities)	mm/dd/yyyy
<b>iii) Milestone #3</b> (Cutover) Production, UAT, and Proof of Concept environments	12/01/2026
<b>v) Milestone #4</b> (Trial Period) 30 days from Cutover	mm/dd/yyyy

*\* USAC required milestone date*

**3. Disbursement Criteria**

USAC will disburse the CSC Stand-Up or the CRM O&M Transition FFP associated with each Milestone upon determining that Vendor has met all obligations and requirements associated with a given Milestone, adjusted for any delivery delays. Details of Milestone acceptance will be mutually agreed upon in the Contract.