

FOR INDUSTRY USE ONLY — NOT A SOLICITATION

## Universal Service Administrative Co. (USAC)

Schools and Libraries Division (SLD) — E-Rate Program

E-Rate Productivity Center (EPC) Modernization

### INDUSTRY DAY ANNOUNCEMENT

**Event Type:**

Industry Day — EPC Modernization

**Tentative Date:**

Monday, June 29, 2026

**Time:**

9:00 AM – 1:00 PM Eastern Time

**Location:**USAC Headquarters  
700 12th Street, NW, Suite 900  
Washington, DC 20005**USAC Point of Contact:**

Noor Jalal

Senior Manager of Procurement

[Noor.Jalal@usac.org](mailto:Noor.Jalal@usac.org)**RSVP Deadline:**

Friday, June 19, 2026, by 5:00 PM ET

**Attendance Limit:**

Maximum three (3) representatives per company

**Company Overview Due:**

Friday, June 19, 2026, by 5:00 PM ET

## ABOUT USAC AND THE E-RATE PROGRAM

The Universal Service Administrative Company (USAC) is a not-for-profit corporation that administers the Universal Service Fund (USF) on behalf of the Federal Communications Commission (FCC). USAC oversees four major programs — High Cost, Lifeline, Rural Health Care, and the Schools and Libraries Program, commonly known as E-Rate — each designed to extend affordable telecommunications and broadband access to underserved communities across the United States.

The E-Rate program is one of the largest federal education technology funding initiatives in the nation. It provides discounts on broadband and telecommunications services to eligible schools and libraries, ensuring that students and patrons have access to the modern connectivity required for a dynamic 21st-century learning environment.

### Program Scale and Complexity

The operational scale of E-Rate is substantial. Each funding year, USAC's Schools and Libraries Division (SLD) manages:

- Thousands of Form 471 applications submitted by schools and libraries nationwide, each containing Funding Request Numbers (FRNs) requiring individual review and eligibility determination
- A multi-phase review lifecycle that includes Program Integrity Assurance (PIA) review, outreach to applicants and service providers, invoicing (BEAR and SPI), post-commitment activity, and COMAD compliance work
- A large business process outsourcing (BPO) operation that relies on EPC for task management, document access, and workflow routing
- Coordination with external federal systems including SAM, FCC FRN registration services, and National School Lunch Program (NSLP) eligibility data

- Billions of dollars in annual funding commitments requiring a rigorous, auditable, and FISMA-compliant technology infrastructure

All of these operations are administered through E-Rate Productivity Center (EPC) — USAC's primary transactional and workflow platform.

## EPC: CURRENT SYSTEM OVERVIEW

EPC is an Appian-based case management and workflow automation platform that was originally built between 2013 and 2015. It serves as the system of record for E-Rate program administration, supporting applicants, service providers, BPO reviewers, SLD staff, compliance teams, and USAC leadership across every phase of the funding cycle.

### Key Functional Modules

- Applicant and Service Provider Portal — Form wizards, document uploads, outreach response pages, contract upload modules
- PIA Review Workflow — Task queue management, FRN eligibility review, document access, outreach generation
- Wave Processing — Batch commitment generation and funding award processing
- Invoicing — BEAR and SPI invoice routing, eligibility validation, payment request generation
- COMAD and Post-Commitment — Compliance activity tracking, audit support, commitment adjustment workflows
- Reporting and Analytics — Operational dashboards, KPI monitoring, regulatory reporting
- Integration Layer — Connections to USAC financial systems, SAM, FRN registration, NSLP, EDW, and document management

## TECHNICAL CHALLENGES AND ARCHITECTURAL PAIN POINTS

A deep technical assessment of EPC has surfaced a set of structural challenges that collectively impede USAC's ability to modernize the platform, adapt to policy changes, reduce operational costs, and leverage contemporary technology capabilities. These are not isolated defects — they reflect a coherent pattern of architectural technical debt that has accumulated over more than a decade of incremental development.

Challenge Area	Operational Impact
<b>Monolithic Architecture</b>	Inability to modernize incrementally; each release requires extensive regression testing across the entire platform.
<b>Embedded Business Rules</b>	Policy changes require coordinated updates across code, database, and UI layers. Rule auditing and compliance tracing are extremely difficult.
<b>Multi-Year Schema Fragmentation</b>	Cross-year analytics require complex UNION queries. Historical trend analysis and longitudinal audit work are severely constrained.
<b>No Automation or AI Integration Points</b>	All document interpretation, invoice matching, and FRN eligibility review are performed manually by BPO and SLD staff at significant cost.

<b>Reporting Debt</b>	Reporting latency, inconsistent KPI definitions, and unsustainable dashboard proliferation impede operational visibility and program oversight.
<b>Point-to-Point Integrations</b>	Integration failures propagate silently. System-wide data synchronization lags and inconsistencies create downstream errors in eligibility and funding calculations.
<b>Legacy DevOps Practices</b>	Manual deployment pipelines, environment drift, and slow test cycles increase release risk—especially during peak filing season.

## Operational Consequences

The architectural constraints described above manifest in direct operational challenges for USAC:

- High PIA reviewer workload driven by the absence of automation hooks, manual document interpretation, and no AI-assisted eligibility screening
- Extended outreach cycles caused by inadequate applicant UX guidance and the absence of real-time, AI-driven form validation
- Labor-intensive invoicing processes requiring manual matching of invoice line items to contracts, FRNs, and discount calculations — workflows that are largely rule-based and suitable for automation
- Disproportionate COMAD burden due to the lack of cross-year data relationships and predictive compliance pattern detection
- Slow platform enhancement cycles — rule changes that should take days require weeks because of distributed, hard-coded logic and large, fragile process models
- Elevated risk of data inconsistency and reviewer error when eligibility rules are embedded in both procedural database code and application-layer expression rules with no unified governance

## USAC'S MODERNIZATION VISION

USAC recognizes that sustaining and improving E-Rate program operations requires a fundamental re-architecture of EPC rather than continued incremental patching. The strategic direction is to leverage the significant advances in the Appian platform since EPC's original build — including Appian 24.x/25.x capabilities — combined with modern data architecture patterns and AI/ML technologies, to deliver a system that is modular, intelligent, and operationally resilient.

### Strategic Modernization Imperatives

- **Modular, Event-Driven Architecture** — Decompose the monolithic EPC application into domain-bounded modules with clear interfaces, enabling incremental deployment and reducing regression risk across the platform
- **Externalized and Governed Business Rules** — Migrate business rules from stored procedures, expression rules, and hard-coded UI logic into Appian Decisions, centralized decision tables, and a governed rules service that supports rapid policy updates
- **Intelligent Document Processing (IDP)** — Implement AI-assisted document classification, metadata extraction, and contract-to-FRN-to-invoice relationship validation to eliminate the most labor-intensive manual review steps
- **AI-Assisted Review and Copilot Capabilities** — Leverage Appian Agent Studio and ML scoring models to support PIA reviewers with eligibility recommendations, anomaly flagging, and cross-record consistency checks

- Unified Data Architecture and Data Fabric — Replace the multi-year fragmented schema with a unified semantic data model, enabling cross-year analytics, longitudinal audit trails, and AI/ML model training
- Modern Reporting and Process Intelligence — Deploy Appian Process HQ and a governed KPI layer to replace the 1,000+ Tableau dashboard ecosystem with operationally integrated, real-time program insight
- Contemporary Appian DevOps Practices — Adopt Appian Compare, Automated Deployment Manager (ADM), Test Automation, and Health Checks with ML optimization to professionalize the release lifecycle

USAC intends to pursue this modernization in a phased approach that delivers measurable operational value at each stage while managing transition risk, particularly around filing season continuity. The modernized EPC must remain fully compliant with FISMA, NIST 800-53, and applicable FCC governance requirements throughout the transition.

## PURPOSE OF INDUSTRY DAY

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USAC is hosting this Industry Day as an exploratory, informational engagement with the vendor community. The purpose is to provide context on the E-Rate program, present an honest assessment of EPC's current state, share USAC's modernization direction, and hear from vendors with relevant expertise.

This event is NOT a solicitation. It does not constitute a request for proposal. Attendance and submission of a Company Overview impose no obligation on either party. Information shared by USAC during Industry Day is provided for context only; vendors should not rely on it as the basis for future proposal responses without verification.

### Who Should Attend

USAC is specifically seeking engagement from vendors who can demonstrate:

- Deep, hands-on experience designing and delivering large-scale Appian platform modernization programs — particularly those involving architectural decomposition of legacy monolithic Appian applications
- Expertise in Appian's most recent capabilities, including Appian Agent Studio, Data Fabric, Process HQ, Appian Decisions, Automated Deployment Manager, and Health Checks
- A proven track record in federal, regulatory, or complex program administration environments requiring FISMA compliance, multi-stakeholder coordination, and phased delivery under operational continuity constraints
- Experience integrating AI/ML capabilities — including intelligent document processing, ML scoring, and AI copilot features — within the Appian platform
- Strong capabilities in data architecture modernization, including unified semantic data modeling, ETL pipeline re-architecture, and data governance

### What Vendors Can Expect

- Presentations from E-Rate Program Leadership (Schools and Libraries Division) on program operations, priorities, and the operational impact of current system constraints
- Presentations from USAC IT Leadership on EPC's current technical architecture, the full scope of identified technical debt, and the strategic modernization vision
- An open Q&A session providing vendors the opportunity to ask clarifying questions and engage directly with USAC leadership

- Context sufficient to understand the complexity, scale, and technical depth of the modernization work USAC is exploring

## INDUSTRY DAY AGENDA

The following is the tentative agenda for the half-day session. USAC reserves the right to adjust the agenda as needed.

Time	Topic	Presenter(s)
9:00 AM – 9:15 AM	<b>Welcome and Opening Remarks</b>	USAC Executive Leadership
9:15 AM – 10:15 AM	<b>E-Rate Program Overview and Mission</b>	E-Rate Program Leadership, Schools and Libraries Division (SLD)
10:15 AM – 11:15 AM	<b>EPC Current State: Architecture and Technical Challenges</b>	USAC IT Leadership
11:15 AM – 11:30 AM	<b>Break</b>	
11:30 AM – 12:00 PM	<b>Modernization Vision and Strategic Direction</b>	USAC IT Leadership
12:00 PM– 12:45 PM	<b>Open Q&amp;A — Vendor Dialogue</b>	USAC Program and IT Leadership
12:45 PM – 1:00 PM	<b>Closing Remarks and Next Steps</b>	USAC Executive Leadership

## CONFIDENTIALITY

This event is subject to the terms of the Confidentiality Agreement (attached hereto as Attachment 1) which must be executed by Vendor and submitted along with any RSVP.

## RSVP AND ATTENDANCE REQUIREMENTS

This will be an in-person event. Vendors' core team members (maximum of three representatives) must attend in-person. Additional attendees may attend remotely. Vendors wishing to attend Industry Day must submit an RSVP, a Company Overview and signed Confidentiality Agreement - Attachment 1 no later than Friday, June 19, 2026, by 5:00 PM Eastern Time. Submissions received after this deadline may not be accommodated.

### Attendance Limitations

- Each company may send a maximum of three (3) representatives
- All attendees must be identified by name and title in the RSVP submission
- Substitutions after the RSVP deadline should be communicated to the USAC Point of Contact as early as possible
- Attendees will be required to present government-issued photo identification upon entry to USAC's office building
- USAC reserves the right to limit attendance if overall response volume requires it

### RSVP Submission

Complete the table below and submit it along with the signed Confidentiality Agreement - Attachment 1 to the USAC Point of Contact identified on the cover page of this announcement:

Field	Vendor Response
Company Name	
Primary Point of Contact (Name)	
Title	
Phone Number	
Email Address	
Attendee 1 — Full Name, Title, email address and phone number	
Attendee 2 — Full Name, Title, email address and phone number	
Attendee 3 — Full Name, Title, email address and phone number	

Add additional rows for remote attendees if applicable.

## COMPANY OVERVIEW REQUIREMENTS

In addition to the RSVP submission, each company must provide a written Company Overview. The purpose of the Company Overview is to allow USAC to understand the experience, capabilities, and market positioning of each participating vendor before the Industry Day session. This will allow USAC leadership to engage in more substantive dialogue during the Q&A portion of the day.

### COMPANY OVERVIEW SUBMISSION REQUIREMENTS

**Maximum: Three (3) Pages**

Each company invited to attend Industry Day must submit a Company Overview no later than June 19, 2026, by 5:00 PM ET. The overview must address all four (4) items below. Responses should be factual and concise; marketing language should be avoided.

1. Years of experience in providing Application Development services using Appian, including a summary of representative engagements.
2. Your company's core competencies as they relate to Appian platform modernization, process automation, system integration, and data architecture.
3. What differentiates your organization from competitors in the market, including proprietary accelerators, methodologies, tooling, or intellectual property relevant to large-scale Appian modernization.
4. Number of clients you currently serve with similar Appian-based solutions, particularly in federal, regulatory, or grant/program administration environments.

Submissions must be sent to the USAC Point of Contact listed above by the deadline. Files should be submitted in PDF or Microsoft Word format and must not exceed three (3) pages, excluding cover page.

## GENERAL TERMS AND CONDITIONS

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- This announcement is issued for information and planning purposes only. It does not constitute a solicitation for proposals or a commitment by USAC to issue a solicitation.
- No reimbursement will be provided by USAC for any costs incurred in preparation for or attendance at Industry Day.
- Responses to this announcement and submissions of Company Overviews are voluntary. Non-participation in Industry Day will not prejudice any vendor in any future procurement process.
- Information provided by USAC during Industry Day is for context only. Vendors may not rely on verbal statements or presentation materials as representations of future contractual requirements.
- USAC is a not-for-profit Delaware corporation operating under the oversight of the FCC. USAC is not a federal agency; however, USAC IT systems and vendors handling USF data must comply with FISMA and NIST requirements as applicable to federal agencies.
- Any questions regarding this announcement should be directed to the USAC Point of Contact listed on the cover page.
- USAC reserves the right to cancel or reschedule Industry Day with reasonable notice to registered attendees.

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