

USAC SOLICITATION FOR

**Customer Service Center (CSC) Support and CRM Operations & Maintenance
(O&M) Business Process Outsourcing (BPO) Services**

SOLICITATION INFORMATION:

Method of Solicitation: Request for Proposal ("RFP")
Award Effective Date: TBD
Period of Performance: (15) month base period; four (4) twelve (12) month option periods
Solicitation Number: USAC-26-009
Solicitation Issue Date: March 4, 2026
Offer Due Date: April 28, 2026 at 11:00 AM ET

CONTRACT TO BE ISSUED BY:

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

USAC RFP PRIMARY CONTACT:

USAC CONTACT INFORMATION	OFFEROR CONTACT INFORMATION
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RFP COVER PAGE

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1. INTRODUCTION

USAC is seeking a qualified vendor (“Vendor”) to provide managed full-suite customer service professional services and technology, supporting Universal Service Fund (“USF”) Program Participants (“Participants”) throughout all phases of their participation. All entities who receive this RFP shall be referred to as an “Offeror”. The entity that is awarded the work shall be referred to as “Vendor”. This RFP is for industry professional service experts in support of customer service implementation and operations. Along with the provision of agent-based customer services, to help USAC modernize and improve its service capabilities, included in this RFP is the transition of CRM operations and maintenance (“O&M”) for our enterprise-wide customer relationship management (“CRM”) system Microsoft Dynamics 365, to be used in Vendor operations and by USAC personnel across its customer service touch-points – including those customer service interactions not handled by Vendor. Offerors may bid on CSC support services or CRM operations and maintenance or both.

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 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; FCC orders, FCC written directives, 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:

- The High Cost (“HC”) Program, which provides support for connectivity in rural and underserved communities;
- The Lifeline Program, which provides support to low-income consumers;
- The Rural Health Care Program (“RHC”), which provides support for rural health care providers; and
- The Schools and Libraries (“E-Rate”) Program, which provides support to eligible schools and libraries and consortia of eligible schools and libraries.

The subject of this RFP are the RHC, HC, and E-Rate Programs of the USF as well as the USAC Finance Division.

1.2. Objective

USAC is seeking a Vendor to provide customer service professional services and technology. The Base Phase, to begin at time of Agreement ratification, includes the provision of customer service professional services for Contributors, E-Rate, High Cost, Rural Health Care, and Service Providers, as well as the transition of O&M of the MS Dynamics CRM to the selected Vendor. Currently, the scope of the CRM component is constrained only to USAC’s customer service complaints, and whistleblower processes. It will not include additional CRM modular or functional

features in support of larger non-customer service areas such as human resources, project automation, finance/invoicing, etc., with the exception where personnel in these areas directly support customer service efforts. However, USAC may want to implement such broader capabilities in the future.

1.3. Company Profile

USAC is a not-for-profit Delaware corporation operating under the oversight of the 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 (as defined in Section C.1.D of this RFP) awarded as a result of this RFP will not be a subcontract under a federal prime contract. USAC does, however, conduct its procurements 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; 200.324; 200.326-327 and App. II to C.F.R. Part 200 (collectively “Procurement Regulations”).

Additionally, any confidential or proprietary information received from or disclosed by Offeror to USAC is subject to disclosure under the Freedom of Information Act. Information systems at USAC, including any solution proposed by Offeror, 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.

1.4. 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”), Vendor offices, or such other location as USAC may approve in its sole discretion. All Vendor and Subcontractor personnel under the Contract must work from Vendor or approved Subcontractor offices. Telework is not authorized under the Contract. Vendor offices must be accessible to USAC staff to enable USAC staff to visit frequently and observe Vendor activities ensuring Vendor compliance with USAC procedures.
- B. A Contract kick-off meeting may be held at USAC Headquarters or virtually. Status meetings and other meetings may be held telephonically or in person, at USAC’s discretion. USAC will not reimburse Vendor for any travel related expenses for kick-off meetings, status meetings, and other meetings.
- C. Services requiring work at USAC Headquarters will include appropriate workspace and appropriate access to USAC’s computer network. **NOTE: To access USAC IT Systems, Vendor employees must first sign USAC’s IT Security Rules of Behavior Form and complete mandatory IT Security and Privacy Awareness Online Training. Vendor may be required to complete Role-Based Privacy Act Training if accessing USAC information systems designated as a federal system of records (i.e., EPC).**

- D. Status update meetings and other meetings may be held virtually, except to the extent that USAC or Vendor require in-person presence, and in accordance with USAC and Vendor Continuity of Operations Plan (“COOP”). Vendor staff will be considered visitors when on site at USAC Headquarters for meetings or to conduct audits. All visitors must complete USAC’s Visitor Form, [USAC Visitor Form](#), and wear a badge at all times while on site. All in-person meetings will be held at USAC Headquarters or other reasonable locations designated by USAC. Vendor may also be required to attend meetings at the FCC offices located at 45 L Street NE, Washington, D.C. 20554. USAC will not reimburse the Vendor for any travel related expenses under an awarded Contract.
- E. Within five (5) business days, upon written request by USAC, Vendor 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.
- F. Vendor shall comply with applicable Occupational Safety and Health Administration (OSHA) Regulations set forth in Article 1 of **Attachment 10 (Master Services Agreement)**. Nothing in this Section shall excuse noncompliance with any applicable federal, state and local laws establishing more protective safety protocols than those established herein.

1.5. Confidentiality

This RFP and any resultant contract are subject to the terms found in **Attachment 8 (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 plus any executed Optional Renewal Terms.
- B. Cutover means the date that Customer Service begin to log user activity.
- C. Initial Term means the period of time from the Effective Date of the Contract to TBD.
- D. Optional Services the services included as non-compulsory and are neither successive nor sequential.
- E. Customer Service Center Optional Services Term means the period of time that USAC may obtain Optional Services pursuant to **Attachment 2 (Statement of Work)**, USAC may, at its option and in its sole discretion, enter into an Optional Services Term with Vendor.

- F. CRM Optional Services Term means the period of time that USAC may obtain Maintenance Services, or extend the Hosting and/or Licensing pursuant to **Attachment 2 (Statement of Work)**.
- G. A Returned Invoice is defined as any Invoice Activity with an error that impacts the disbursement amount or the decision is not fully documented according to the procedures in so that it must be returned for correction or additional work.
- H. Training Period is defined as the initial onboarding, including system access (FCC and USAC) and train-the-trainer sessions for Customer Service Activities.
- I. Invoice Line is defined as the invoice line submitted by the applicant on the invoice. Each invoice submitted may contain multiple invoice lines for various funding requests for an Applicant.
- J. Major Enhancement means a modification to a prior CRM Release Phase(s) that requires more than one (1) sprint of three (3) weeks to deploy.
- K. Maintenance Services means the operation and maintenance of the software/application such as system monitoring, issue resolution, application administration including upgrade support, patch implementation for all software, and helpdesk services.

2.2. Contract Type

USAC intends to award a contract to the responsible Offeror whose proposal represents the best overall value. USAC may award separate contracts for the Customer Service Center Services and CRM O&M Services. Therefore, Offerors are encouraged to submit a proposal for all of the requirements of either the Customer Service Center Services or CRM O&M Services. Offeror must be willing to enter into a Contract with USAC for a multi-year term, with no pricing structure increases during the term of the Contract. The Contract to be awarded to the selected Vendor will be either firm fixed-price (“FFP”) or a blend of fixed-priced and variable-priced services, and Offerors should submit proposals for both pricing options. For the Customer Service Center, the initial stand-up of the operation, ongoing project management, and oversight activities will be fixed-price. Offerors should provide pricing for customer service center transactions based on a per unit cost option and an FFP option. The per unit price for each service will be tiered based on increasing volume expectations, and Offeror will be expected to bid a range of volume tiers as outlined in **Attachment 1 (Bid Sheet)**. For the CRM O&M, all requirements and services will be provided on a firm fixed-price basis or a time and materials (“T&M”) basis, as detailed further in **Attachment 1 (Bid Sheet)**.

USAC anticipates attaching credits during the stand-up period for any milestone delays. USAC also anticipates attaching service level credits of at least five percent (5%) for failing to reach agreed upon goals for any critical service levels (i.e., CSLAs) within each billing period. Offeror must address any concerns with CSLAs or other milestone credits in its response to this proposal to minimize negotiation and contract award time.

2.3. Contract Term

The initial term of the Contract will commence on the Award Effective Date (as dated on page one of this RFP) and will continue for fifteen (15) months, unless the Contract is sooner terminated in accordance with its terms ("Initial Term"). The Initial Term shall consist of a three (3) month stand-up period followed by a twelve (12) month base year period of performance.

USAC may, in its sole discretion, extend the term of the Contract for up to four (4) twelve (12) month periods (each an "Option Term") on the terms and conditions then in effect, by providing Vendor notice of USAC's intent to extend the term of the Contract no later than forty-five (45) days prior to the expiration of the current Initial Term or Option Term.

The Initial Term, together with any exercised Option Term(s), shall be referred to as the "Contract Term".

2.4. Contract Pricing

USAC anticipates that the Contract will be either fully firm fixed-price or have a hybrid fee structure of fixed pricing and variable-priced services with an overall not-to-exceed ("NTE") price for each year. The initial stand-up of the customer service center operation, ongoing project management, and oversight activities will be fixed price and the customer service center transactions may be based on a per unit cost. Offerors shall provide separate pricing for CRM O&M as FFP or T&M.

Offerors should also provide a separate firm fixed price bid for the entire scope of work outlined in the RFP and attachments for each year of the contract. Fixed price activities include project management, reporting, audits, continuous improvement, and other fixed monthly costs.

In the event that the FCC significantly changes USF Programs and/or USAC's roles and/or responsibilities in the programs, USAC reserves the right to terminate the Contract for impracticability. USAC also reserves the right to hire additional support for customer service center operations as required to meet program needs.

In order to obtain the best value for USAC, USAC requests that Offerors provide pricing in accordance with **Attachment 1 (Bid Sheet)**. Offerors are encouraged to present additional creative pricing options, along with any assumptions, that may prove best value for USAC. Offerors may also **present additional creative pricing options** that may prove more cost-effective for USAC than the two (2) options requested.

2.5. Service Level Credits

USAC expects Vendor to perform to a high standard and deliver work of consistently high quality. In order to ensure that Vendor meets USAC's expectations, USAC intends to measure Vendor's performance against a variety of SLAs, which are listed in **Attachment 5 (SLAs)**. USAC anticipates attaching service level credits of at least five percent (5%) of fees for failing to reach

agreed upon goals for any SLAs within each billing period. Offeror is asked to propose the exact calculation for each service level credit.

The primary performance standards applicable to Vendor are identified in **Attachment 2 (Statement of Work, Section 3.6 Performance Standards)**. Vendor shall present itself to all customers as USAC, not as a third-party contractor.

If a Milestone indicated in **Attachment 9 (Transition Milestones)**, 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.

Upon written notice from USAC that USAC desires Vendor to extend a Milestone Date, Vendor will extend the Transition Timeline for the period of time requested by USAC. If the date is extended for more than ten (10) days as a result of delays caused by Vendor: (a) USAC will be entitled to the Stand-Up Fee reductions specified above for failure to meet the Milestones, in addition to any other remedies that USAC may have against Vendor; (b) Vendor will reimburse USAC for any verifiable direct costs or expenses incurred by USAC as a result of such delay, including but not limited to USAC's lost savings as a result of such delay; and (c) USAC may terminate this Agreement for cause.

3. SCOPE OF SERVICES

3.1. Responsibilities and Requirements of Vendor

The Scope of Services can be found in **Attachment 2 (Statement of Work)**. At a high level, the services include:

- **Customer Service Center Stand-up** – Implementation of a full service customer service center, including phone systems, porting phone number to vendor, Integrated Voice Response (“IVR”) software, customer service center technologies proposed by Vendor, skilled and trained customer service center staff.
- Any customer service center and data storage technologies proposed as part of the customer service center stand-up that are not hosted in an authorized by Federal Risk and Authorization Management Program (FedRAMP) environment must be FISMA accredited to meet the requirements of NIST 800-53 Revision 5.
- **Sustomer Service Center Operations** – Day to day operation of the Sustomer Service Center after stand-up is completed. This service will be provided from Cutover through the end of the Base Period. At least 90 days prior to the end of the Base Period, USAC will communicate its intent to exercise the annual option for continued operations.

- **Ad Hoc CSC Support** – Occasionally, USAC may ask the vendor for ad hoc contact center and related operational support, separate from the day to day customer service center operations for E-Rate, High Cost, Lifeline, and Finance.
- Vendor shall not propose their own proprietary hosting environment or tenant on a proprietary SaaS CRM system.
- **CRM Enhancements** – An option for an Enhancement to previously released functionality. 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. Vendor shall provide support for the full software development lifecycle and adhere to the governance and policies referenced as it would do in the initial release.
- **CRM Operations & Maintenance Services** – Day to day support, monitoring, and patching of the CRM and all third party software that is part of the system operating environment after stand-up is completed. This service will be provided from Cutover through the end of the Initial Term. At least ninety (90) days prior to the end of the Initial Term, USAC will communicate its intent to exercise the annual option for continued operations and maintenance. In the event that USAC does not exercise its option for an Optional Maintenance Term, Vendor, pursuant to the Contract, shall cooperate with USAC and promptly take all steps required to assist USAC with a smooth transition of any operations and processes including assisting with independently procuring Third Party Software and hosting services, including resale of Third Party Software in the event Vendor acts as a reseller of Third Party Software or extension or assignment of software licenses to the extent applicable and permitted by their terms.

4. OPERATIONS

4.1. Responsibilities and Requirements of Vendor

The primary responsibilities and requirements of Vendor are identified below and in **Attachment 2 (Statement of Work)**.

- A. Vendor and its reviewers, staff and employees working on the USAC account shall be located within the United States.
- B. Vendor 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. Vendor shall be responsible for all work performed by any subcontractors.
- D. Vendor shall ensure that the following are reported to USAC and included in any invoice:
 1. Name and address of Vendor;
 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.

4.2. Performance Standards

USAC expects Vendor to perform to a high standard and deliver work of consistently high quality. In order to ensure that Vendor meets USAC's expectations, USAC intends to measure Vendor's performance against a variety of SLAs. The proposed SLAs are listed in **Attachment 5 (SLAs)**.

5. MEETINGS

5.1. Project Kick-off Meeting

Vendor shall schedule, prepare an agenda for, and coordinate a project kick-off meeting to be held at USAC's Offices, or virtually, 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 Vendor, Vendor 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 all Key Personnel (as described in Section 5.8 of this RFP and **Attachment 6 (Key Personnel)**), USAC's technical representatives, and any other attendees designated by USAC, including key representatives from the FCC. USAC will not reimburse Vendor for any travel related expenses related to the project kick-off meeting.

Vendor shall present the project plan to USAC for discussion. A concerted effort shall be made to gain a thorough understanding of USAC's expectations. However, nothing discussed in this, or in any subsequent meetings or discussions between USAC and Vendor shall be construed as adding to, deleting, or modifying any Contract requirements, including deliverable specifications and due dates. USAC will review the project plan within five (5) business days. All Contract modifications and amendments must be approved in writing by an authorized USAC Procurement representative.

5.2. Weekly Status Meetings

Beginning five (5) business days after contract award, Vendor must schedule and participate in weekly status meetings regarding the CSC and CRM O&M.

Vendor shall prepare a status report and submit it to USAC once per week. The report must include the current status for each of the project work streams including percentage of completion, achievements, and any risks/issues relating to Contract performance or payment. The report must include an expected completion date and the circumstances surrounding any possible delays. The report shall be submitted one (1) business day before each regularly scheduled status meeting and no later than Friday noon (12:00 PM ET) during weeks in which the meeting is scheduled for Monday or when no status meeting is scheduled.

5.3. Milestone Status Meetings

Key Personnel must be prepared to present each deliverable either in-person or virtual via webcast meeting, as directed by USAC. For revision rounds, the Vendor's Key Personnel should be prepared to walk through any editing round questions via phone.

Key Personnel must be prepared to provide interim deliverable updates, as requested by USAC.

5.4. CSC and CRM Operational Review Meetings

After successful stand up of the CSC and transition of CRM O&M, USAC and Vendor will agree upon a new operational meeting schedule.

5.5. Accessibility

Key Personnel must be accessible via telephone or email during USAC's normal business hours, Monday through Friday (9:00 AM - 6:00 PM ET).

5.6. Weekly Status Report ("WSR")

Vendor shall develop and provide a WSR using Microsoft Office Suite applications, on a weekly basis (timing to be agreed upon with USAC after kick-off) via electronic mail to the USAC Contract Administrator during Project Transition. The WSR will be used during the weekly status meetings to ensure Deliverables are on track. The WSR shall include the following:

- a) Activities during each week by task (include on-going activities, new activities, activities completed; progress to date on all above-mentioned activities). Start each section with a brief description of the task.
- b) Problems and corrective actions taken. Also, include issues or concerns and proposed resolutions to address them.
 - 1) Personnel gains, losses, and personnel security status updates.
 - 2) USAC actions required.
 - 3) Schedule (show major tasks, milestones, and deliverables; planned and actual start and completion dates for each).
- c) On a monthly basis, Vendor will conduct a review of all critical and non-critical SLAs with USAC, address any missed SLAs, and identify SLAs that are nearing any target thresholds.

6. KEY PERSONNEL

Attachment 6 (Key Personnel) details the minimum personnel who shall be designated as Key Personnel. USAC requires that Key Personnel be assigned for the duration of the Contract. Key Personnel may be replaced or removed subject to special contract requirements, Key Personnel substitution. Any additional labor categories must include the associated labor hour bill rate for each additional category submitted as well as the experience and qualifications of the personnel to be assigned to that labor category.

All Key Personnel and other staff to support this Contract must have employment background checks equal to those required by USAC for employees and contractors: education, national criminal, employment verification and social security verifications. Vendor may propose additional labor categories in its proposal submission. All proposed labor categories must include the experience and qualifications of the personnel to be assigned to that labor category.

7. PROPOSAL SUBMISSION INSTRUCTIONS

7.1. Master Services Agreement Contract Terms

The Contract(s) awarded as a result of this RFP will be governed by, and subject to, terms and conditions closely based upon the Master Services Agreement set forth in **Attachment 10 (Master Services Agreement)** and all attachments herein. Offeror's submission of a proposal constitutes its agreement to the Master Services Agreement and their precedence over any other terms, requirements, or conditions proposed by Offeror. Offeror's submission must include a statement certifying that the Master Services Agreement set forth in this RFP have been reviewed by Offeror's office of general counsel (or equivalent legal representative).

Offeror's proposal shall identify exceptions or additional terms (collectively "Exceptions") to the Master Services Agreement. Exceptions will be considered only if they are clearly identified in a separate attachment titled "**Exceptions to RFP Terms.**" Offeror shall include a redlined copy of Attachment 10 (Master Services Agreement) showing any proposed modifications in track changes format.

In addition, proposals that include material exceptions to the Master Services Agreement may be considered unacceptable and render Offeror ineligible for award unless 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 Master Services Agreement that are included in Offeror's proposal. USAC will not consider or negotiate any exceptions to the Master Services Agreement not included in Offeror's proposal.

7.2. Period of Acceptance of Offers

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

Offeror shall ensure that its proposal:

- A. Concisely addresses 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 the USAC Procurement Department no later than **11:00 AM ET on April 28, 2026** ("Proposal Due Date").
- C. Is submitted in the form of one (1) electronic copy of each proposal volume, submitted to Anthony.Smith@usac.org with a copy to Procurement@usac.org. The subject line for all email communications related to this solicitation should **only** state the Solicitation Number, USAC-26-009, 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 by USAC after the Proposal Due Date and time is “late” and will not be considered by USAC, unless USAC determines, in its sole discretion, that (1) circumstances beyond the control of Offeror prevented timely submission, (2) consideration of the offer is in the best interest of USAC, or (3) the offer is the only proposal received by USAC. Proposals, once submitted, cannot be withdrawn for one hundred twenty (120) calendar days from the date specified for receipt of offers, except with the written consent of USAC.

7.3. Submission of Questions

USAC will only accept **written questions** regarding the RFP. All questions must be submitted to Procurement@usac.org with a copy to Anthony.Smith@usac.org no later than **March 18, 2026 at 11:00 AM ET**. USAC plans to post all questions and responses under this procurement on our website on **March 30, 2026 by 5:00 PM ET**.

7.4. 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.

7.5. 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 Offeror.

7.6. RFP Key Dates

DATE	EVENT
March 4, 2026	RFP Release
March 18, 2026	Questions Due to USAC by 11:00 AM ET at Procurement@usac.org
March 30, 2026	Answers Posted by USAC by 5:00 PM ET
April 28, 2026	Proposal Due to USAC by 11:00 AM ET at Procurement@usac.org
August 2026	Anticipated Contract Award
September 2026	Anticipated Kick Off

7.7. Contract Award

USAC will evaluate proposals and may award a contract resulting from this solicitation to the Offeror whose offer is most advantageous to USAC. USAC may reject any or all offers if such action is in the public's or USAC's interest. USAC need not accept the lowest offer. USAC may waive informalities and minor irregularities in any or all offers received.

7.8. Identification of Confidential Information

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

All deliverables submitted by Offeror to USAC are considered Confidential Information of USAC (as defined in **Attachment 8 (Confidentiality Agreement)**) and are the sole property of USAC. USAC may use, copy, distribute or disclose the deliverables in its sole discretion.

7.9. Proposal Cover Page

Offeror must ensure that its proposal contains a cover page that 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 Unique Entity ID number;
- E. The date of submittal;
- F. A statement verifying the proposal is valid for a period of one hundred twenty (120) days; and
- G. The signature of a duly authorized Offeror representative.

7.10. Proposal Content

The proposal shall be comprised of the following five (5) volumes, numbered Volumes I, II, III, IV, and V. All text shall be twelve (12) point font, and page limits shall be followed as indicated.

A. Corporate Information (Volume I) – *Limit to three (3) single-spaced pages, excluding financial statements.*

Each Offeror should provide a summary of any corporate information relevant to this RFP, which should include, at minimum:

- a. Length of time providing customer services with relevant and recent information in performing Customer Service Center services;
- 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;

- e. Number of intellectual property infringement suits brought against the Offeror in the last five (5) years, including brief description of the nature and status of such disputes (e.g., settled, under active litigation); and
- f. Recent financial statements, including:
 - 1) Audited balance sheet, cash flow statement, and income statement for previous three (3) fiscal years, and
 - 2) Quarterly financial statements prepared since previous year end financial statements.

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

1. Differentiators

Each Offeror shall provide a brief summary of its qualifications to provide the described BPO services for USAC, including any differentiators. Differentiators may include employee-hiring practices, practices to retain experienced staff, staff training, methods the Offeror uses to maintain high quality standards and staff proficiency, and ability to staff for variable volumes of services. If Offeror intends to partner with another firm that will act as a subcontractor for the performance of any task related to the solicitation, Offeror shall include the identity and qualifications of the subcontractor, any potential conflicts of interest, the scope of the services to be subcontracted, and documentation evidencing that the proposed subcontractor has a demonstrated history of providing excellent services within the scope of services proposed to be subcontracted. *This summary should be no more than one thousand (1,000) words.*

2. Summary of Customer Service and CRM Program Approach

Offeror shall submit a summary of the approach for implementation of the Customer Service Center and CRM O&M transition as independent activities and overall Program management, including oversight and risk management. Offeror shall identify its methodology for accomplishing the deliverables in this RFP, as well as any deliverables or work efforts not included in the RFP solicitation that should be included to assure success in providing the services. *This summary should be no longer than four (4) single-spaced pages of text including any diagrams.*

- a. Discuss end-to-end Program approach, including Project management, invoice reviews, and Customer Service Center and MS Dynamics 365 CRM expertise, as well as gradually building an in-house knowledge base;
- b. Discuss the technical approach and Offeror's plan to meet or exceed USAC's requirements, including clearly specifying the tools and software that will be leveraged;
- c. Discuss how the approach, for each Customer Service Activity and the Program, is auditable and traceable;
- d. Security compliance;
- e. Key Performance Indicators (KPI)s – standard KPIs should be part of the Program approach and the ease of reporting;
- f. Risk considerations - technical readiness, program maturity, deployment considerations; and
- g. Discuss Offeror's experience providing Optional Services support for completing added services.

3. 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 6 (Key Personnel)**. Offeror 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 two (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.

4. SLA Template: Offeror shall provide the proposed calculation for service level credits of at least five percent (5%) in case of failure to meet the critical SLAs.
5. Technical prompts: In addition to the responses listed above, Offeror 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 executing the Customer Service Center and Optional Services to prevent surprises in performance and facilitate sufficient knowledge transfer so that the build will be sustainable over the long-term for USAC? *(three hundred (300) word limit)*
 - b. Please include information on your Program approach and what this means for the USAC team. How would the Program be managed through meetings, personnel leadership, and delivery metrics? How would your team coordinate with USAC's Business Users and IT Teams to 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. *(four hundred (400) word limit)*
 - c. What would be your engagement plan for training (e.g., for program operations) to ensure effective Program management? 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. *(two hundred fifty (250) word limit)*
 - d. What would your approach be to manage potential unexpected surges in volumes? While SLA credits would be waived in the event that volumes significantly exceed forecasts, we would still expect the vendor to make the best effort to continue to provide a high level of customer support. *(two hundred fifty (250) word limit)*
 - e. Please describe your experience standing up Customer Service Centers and transitioning CRM O&M, and tools with federal agencies, demonstrating your expertise in navigating federal requirements such as those associated with the Federal Information Security Management Act (FISMA).



- f. Describe your approach to gathering requirements for a single, centralized system that will be used by many different teams who have differing needs and priorities. How do you meet the individual needs of a team while also trying to identify and get buy in for common and streamlined uses for the tool?
- g. 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). *(three hundred (300) word limit)*
- h. 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? How do you ensure that applications are developed/configured in accordance with required security standards? Please include how you would demo that the functional requirements are met to USAC's satisfaction. *(four hundred (400) word limit)*
- i. What is your staffing model to surge resourcing as needed (e.g., % subcontracted vs. internal, what location are staff pulled from) to ensure on-time delivery? Please provide instances where you were able to significantly surge development staff with numbers of staff added vs. base effort. *(two hundred fifty (250) word limit)*
- j. 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. *(two hundred fifty (250) word limit)*
- k. What (physical and/or logical) security measures are in place at the facilities in which you plan to work? *(two hundred (200) word limit)*
- l. USAC may choose to use Robotic Process Automation ("RPA") to create operational enhancements within the organization. Please describe if any prohibitions, restrictions, or limitations exist within the software licenses or subscriptions of any software and tools Offeror intends to use in the solution that prohibit the use of RPA.
- m. Facilities Information: As part of its RFP response, Offeror shall describe each facility from which it intends to provide services, including the location, approximate number of people who will provide services from that location and other relevant information. *(two hundred (200) word limit)*

6. Conflicts of Interest

Provide a description of any potential conflicts of interest (as described in Section 8.2 of this RFP) including (a) the nature of the potential conflicts and (b) the nature of the means by which you propose to avoid, neutralize, or mitigate such conflicts. *(one hundred fifty (150) word limit)*

7. Artificial Intelligence

USAC will evaluate Offeror's proposed use of Artificial Intelligence ("AI") that complies with Section 4.3 of the Privacy and Security Addendum of **Attachment 10 (Master Services Agreement)**. Offeror must provide an in-depth overview of the proposed use of AI in Offeror's technical approach. Offeror must describe how and in what circumstances AI will be used to perform the Services specified in **Attachment 2 (Statement of Work)**. Offeror's proposal submission should include separate versions of **Attachment 1 (Bid Sheet)** for scenarios with and without the use of AI. Offeror will not be permitted to use, implement, build, or deploy AI tools, services, or code of any type without prior written approval from USAC.

C. Past Performance Information (Volume III) – *Limit to ten (10) single-spaced pages including diagrams.*

Each Offeror shall describe three (3) examples of similar BPO support services that Offeror has provided for similar-sized BPO operations in the past five (5) years. Where the example(s) of similar BPO support services were with clients with federal government security requirements (e.g. FISMA, NIST, OMB guidance), please state so explicitly. It is expected that the Key Personnel provided according to **Attachment 6 (Key Personnel)** will have been heavily involved in at least two (2) of the provided examples of past performance.

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 Offeror's proposal. Although USAC will follow-up with the contacts, Offeror, not USAC, is responsible for ensuring that the questionnaire is completed and returned by the specified date in USAC's transmission. If USAC is unable to reach or obtain a reference for the project, USAC is not obligated to consider the contact in an evaluation of past performance.

D. Price Proposal (Volume IV)

1. Each Offeror shall provide the best financial proposal to complete the work for the duration of the contract term based on the proposed work plan. Identify any assumptions made to create the Price Proposal. Travel or other costs must be factored into the bid, as no additional fees will be paid to perform this work. Each Offeror will provide the following: A bid with a combination of fixed and transactional pricing for the entire scope of work outlined in the RFP.

Offeror shall propose the following prices in **Attachment 1 (Bid Sheet)**:

- a. Stand-up FFP – Fixed fee to cover all costs for initial set up of the work.
 - b. Ongoing FFP – Provide fixed fee pricing, to cover monthly costs of providing set contract requirements, including project management, reporting, auditing, and continuous improvement.
 - c. Variable Fee – Fees to cover transactional pricing for services outlined in **Attachment 2 (Statement of Work)**. Offeror shall include all costs for provisioning the services described in the proposal. Any cost not indicated here will be considered included at no cost to USAC. Offeror may provide prices for additional services as desired, but this is optional. Each Offeror may propose pricing tiers for each service if they wish to do so. The variable fee will include at a minimum the activities/services as detailed in **Attachment 1 (Bid Sheet)**.
 - d. SLA Service Level Credits – Percentage of total fixed or variable fee that will not be paid if Offeror fails to meet the minimum performance on any of the SLAs for a particular month.
2. In addition to the two pricing structures mentioned above, Offerors are encouraged to propose additional creative pricing structures that will be cost-effective for USAC.

E. Insurance (Volume V)

Offeror shall obtain and maintain at its own cost and expense and shall require its subcontractors to obtain and maintain at their own cost and expense insurance, as specified in Article 21 of the **Attachment 10 (Master Services Agreement)**.

8. EVALUATION CRITERIA

USAC will award a contract resulting from this solicitation to the responsible Offeror 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 Offeror – Technical, Past Performance and Price. When combined, the Technical and Past Performance factors are significantly more important than Price.

- A. Technical:** The technical sub factors, including the differentiators listed above, will be considered along with the following listed below:
 1. **Technical Approach:** specifications for technical approach for the Program management, with focus on both each Activity and Program overall. During evaluation (i.e. proposal review and/or in-person discussions), USAC may require a demonstration of a proposed approach in accordance with USAC requirements.

2. **Experience:** Capability of Offeror to deliver the proposed Program support and applicable experience in Offeror implementing similar recent and relevant engagements.
3. **Key Personnel:** Evidence of applicable skills, whether the individuals have done similar work and if the team has worked together on prior engagements, including engagements with overlapping activities (i.e. PMO, BPO, Customer Service Center and Optional Services activities).
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. 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 five (5) years), and quality of Offeror's past performance on past or current contracts for the same or similar services.

Past performance information should specify details across two (2) broad areas:

1. **Program Oversight:** Build of a program similar in nature to the required Customer Services Professional Services Activities, including details on speed to ramp up each activity and process improvement occurred to reduce manual work and improve efficiency and reporting.
2. **Recent and Relevant:** 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 Offeror's proposal that are not identified as references).

C. 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.

Where Offeror proposes an alternate strategy or level of service than USAC requires, it must complete a bid sheet for the USAC required level of service separately from a bid sheet for the Offeror proposed level of service, and clearly document the assumptions used. For example, if Offeror proposes more aggressive SLAs than USAC captured in **Attachment 5 (SLAs)**.

8.1 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. 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 awarded Contract may also be excluded from the competition.

8.2 Discussions

USAC may hold discussions with the highest rated Offerors. Discussions will include issues related to the Offeror's Technical, Past Performance, and Price proposals, and include a targeted demonstration of USAC provided use cases and data. Information for inclusion in discussions will be provided by USAC in advance.

Offers that take material exceptions to RFP requirements, including the Master Services Agreement, 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 are held, decides to address the exceptions during discussions and thereby resolves the exceptions.

8.3 Final Proposal Revisions and Best and Final Offers

After conclusion of discussions, Offerors may be invited to submit final proposal revisions ("FPR") and best and final offers ("BAFO"). At this time, Offerors can make changes to their proposal submissions to address questions and concerns, and competitive pricing specifically addressed in discussions. USAC will send out further instructions on submission of FPR and BAFO to selected Offerors during proposal evaluation.

8.4 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.

8.5 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:

- Offeror has sufficient resources to perform the Contract;
- Offeror has a satisfactory record of performance, integrity, and business ethics;

- 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;
- Offeror has the facilities, and technical and personnel resources required to perform the Contract.
- Offeror is not excluded from government contracting, as listed on the excluded parties list in <https://www.sam.gov>.

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 BPO 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 Offerors without prior notice to any Offeror or individual). 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 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. **Conflicts of Interest**

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 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. 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. For clarification of what would be required of an Offeror to become the Vendor regarding conflicts of interest, review Section 16.1.8 of **Attachment 10 (Master Services Agreement)**.

9.3. Protocol

Offerors should fully comply with this RFP or as otherwise communicated by USAC. Each 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 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 Offeror's staff and any staff member of USAC, other than through the designated USAC RFP primary contact.

9.4. 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 **Attachment 8 (Confidentiality Agreement)**.

9.5. 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, 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 Offeror.

9.6. 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 an Offeror may desire or deem to be material in connection with this RFP. In all cases, Offerors should conduct their own investigation and analysis. In particular, 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 an 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). 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 Offerors with enough information to build their proposals, but it is the Offerors' responsibility to request any additional information that it reasonably believes it may need in connection with this RFP. The 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

- Attachment 1: Bid Sheet
- Attachment 2: Statement of Work
- Attachment 3: Vendor Capability Checklist
- Attachment 4: Case Volumes & Critical SLA Metrics (Available in the Virtual Reading Room)
- Attachment 5: SLAs
- Attachment 6: Key Personnel
- Attachment 7: USAC Information Security and Privacy Control Policy (Available in the Virtual Reading Room)
- Attachment 8: Confidentiality Agreement
- Attachment 9: Transition Milestones
- Attachment 10: Master Services Agreement
- Attachment 11: Change Control Procedures and Governance Model (Available in the Virtual Reading Room)
- Attachment 12: Reserved
- Attachment 13: USAC Record Retention Policy (Available in the Virtual Reading Room)

Note: In order to access the Virtual Reading Room please email a signed copy of **Attachment 8 (Confidentially Agreement)** to Anthony.Smith@usac.org and Procurement@usac.org.