

## **ATTACHMENT 2 – STATEMENT OF WORK**

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## 1. Purpose

Contractor shall implement and perform the operational processes and the Services (as defined in Article 1 of **Attachment 10 (Master Services Agreement)**) described in this **Attachment 2 (Statement of Work)**.

## 2. Responsibilities And Requirements of Selected Contractor

### 2.1. Services to be Performed

The primary responsibilities and requirements of the selected Contractor are identified below.

#### 2.1.1. Application Processing

The review of the FCC Form 471 applications received is known as the Program Integrity Assurance (“PIA”) review and is the largest work stream and most complex part of the E-Rate program to be handled by Contractor. Approximately 36,000 funding applications with over 56,000 individual funding requests are submitted annually. Approximately two-thirds are Category 1 funding applications (Data Transmission/Internet Access) and one-third are Category 2 funding applications (Internal Connections/Managed Internal Broadband Services/Basic Maintenance of Internal Connections). All applications first go through an automated review process within EPC to identify potential issues in the application which require further review. These business rules in EPC identify different types of issues based on the information contained within the application, various databases, and a complex set of business rules. All issues flagged by the system require review before a funding decision can be issued. The review is managed through EPC and requires manual effort, which includes communicating with applicants, generally through EPC, but sometimes also by phone, to ask further questions or request additional documentation. All electronic communications are managed and stored in USAC’s IT systems and calls are summarized in EPC. Different PIA reviews can have different levels of complexity and take a varying amount of time to complete. The team conducting the application review process must review the application against an extensive set of guidelines and federal regulations that are embodied in the internal application review procedures. The rules and regulations governing universal service are located in Title 47 of the Code of Federal Regulations, Part 54 and in orders and directives issued by the FCC.

Reviews can include a four (4)-level review process. The first level of review is conducted by an initial reviewer. The initial reviewer resolves all of the issues, documents findings, and makes a funding decision recommendation. Next, a second reviewer with additional training and experience checks the work of the initial reviewer and signs off on the decisions. The second reviewer can return the application to the initial reviewer for additional work if they determine that the procedures were not followed. For the third level of review, the BPO’s quality assurance team selects a sample of applications to review to ensure that the initial and final reviews were done correctly. For the fourth level of review, USAC independently selects applications for USAC quality assurance review. If any issues are found during either of the third or fourth level of review, or at the final review,



the applications are returned to the initial reviewer for more work. USAC, at its discretion, but in consultation with Contractor may also review a subset of applications in-house.

The PIA review process entails verifying information and reviewing documentation to ensure FCC Form 471 applications are compliant with FCC rules for the E-Rate Program. Once the PIA review is complete, USAC issues a Funding Commitment Decision Letter (“FCDL”). FCDLs are issued in “waves,” or groups of commitments. Waves are run through USAC’s IT systems and require a distinct series of checks and balances to ensure that applications are committed in compliance with program rules.

Contractor will be responsible for processing the following:

- 2.1.1.1. PIA Application Review: All applications undergo this review which checks for compliance with program rules including eligibility of entities, discount rate, eligibility of services, competitive bidding, posting of the FCC Form 470, Red Light check,<sup>1</sup> and a variety of other issues.
- 2.1.1.2. PIA Service Review: The purpose of the “PIA Service Review” is to determine if the requested services are eligible in accordance with program rules. Some FCC Form 471 applications only require this service eligibility review.
- 2.1.1.3. PIA Highly Complex Application Reviews: FCC Form 471 applications for (i) consortia and (ii) non-consortium applications that have 301 or more exceptions are considered “Highly Complex Reviews”. These Highly Complex Reviews will be conducted by a team of highly skilled and experienced reviewers to process these applications in a timely manner. A “Consortium” (or plural, “Consortia”) is any local, statewide, regional, or interstate cooperative association of schools and/or libraries eligible for E-Rate support that seeks competitive bids for eligible services or funding for eligible services on behalf of some or all of its members.
- 2.1.1.4. PIA Heightened Scrutiny Reviews: FCC Form 471 applications meeting certain risk criteria are selected for “Heightened Scrutiny” (“HS”) reviews, including but not limited to, cost-effectiveness, fiber applications, program compliance reviews. These reviews, conducted by special teams with additional training and in-depth technical and programmatic expertise, ensure that FCC program rules are followed and help protect against waste, fraud, and abuse in the program. USAC expects separate, dedicated teams,

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<sup>1</sup> Pursuant to the Debt Collection Improvement Act, Publ. L.No. 104-134, 110 Stat. 1321, 1358 (1996), Red Light status is turned on by USAC or the federal government when an applicant or service provider owes a debt and is in arrears for payment. The Red Light status prevents the debtor from receiving benefits from the federal government (including funds administered by USAC), until the debt is satisfied. Requests for benefits may be dismissed if the debts are not paid. See <https://www.fcc.gov/licensing-databases/fees/debt-collection-improvement-act-implementation>.



and resources to address these HS reviews. HS reviews may vary in complexity such as:

- (a) Simple HS Reviews – Less complex HS reviews that are focused on one or two program rules such as cost effectiveness of wireless plans, endowment reviews, or Red Light status.
- (b) Moderate HS Reviews – More complicated HS reviews that are focused on program compliance rules such as more in-depth cost effectiveness reviews or FCC Form 470 compliance issues.
- (c) Complex HS Reviews – Most complex HS reviews that are focused on multiple program compliance rules, including but not limited to, competitive bidding, conflicts of interest concerns, fiber-related issues such as eligibility, cost-effectiveness, installment payment plan validation, state matching funds for fiber construction, or ineligible entity fair share verification.

### 2.1.2. Post-Commitment Reviews

After receiving an FCDL, applicants submit a number of forms and may request changes to their approved funding requests. These are collectively known as post-commitment reviews. The post-commitment review processes follow a similar pattern to PIA reviews, with up to four (4) possible levels of review, contact with the applicant and/or service provider to resolve any potential program rule violations, and the issuance of a funding decision at the conclusion of the review.

Contractor will be responsible for processing the following:

- 2.1.2.1. FCC Form 486 Reviews: Applicants submit an FCC Form 486 to confirm receipt of services, certify compliance with Children’s Internet Protection Act requirements as needed and start the invoicing process. Based on established criteria, FCC Forms 486 are reviewed by Contractor staff for compliance with federal law and program rule requirements. If applicants file the FCC Form 486 late, reviewers must adjust the funding based on a sliding scale commensurate with the tardiness of the form.
- 2.1.2.2. Appeals: In the event a program participant does not agree with a decision made by USAC, the participant can seek further review by filing an appeal with USAC within sixty (60) days following the issuance of the decision. Similar to other review processes, the appeals review process may involve reaching out to the program participant for clarification, asking follow-up questions, consulting on administrative procedures, and preparing a decision letter with supporting arguments based on detailed procedures. Contractor’s appeals team is also responsible for processing FCC orders that remand decisions back to USAC for further review. The appeals review team must be distinct and separate from all other review teams with appropriate fire walls to ensure independence in their review and decisions for appeals. The appeals review team will also process administrative



corrections based on internal application review errors. In the event the administrative correction is needed due to an error by the vendor, this transaction will not be included for reimbursement.

- 2.1.2.3. Entity updates: Entity updates are needed to correct entity data on FCC Form 471 applications. Contractor shall complete entity updates as needed to ensure FCC Form 471 application data is current and accurate. This can include the list of entities on an application, recipient of service entities associated with a Funding Request Number line item, entity student counts, and entity type and subtype information.
- 2.1.2.4. Invoicing: All invoices submitted to USAC are reviewed for accuracy and for compliance with program rules. A complex set of business rules checks for program compliance, which can result in requesting additional information to resolve issues. Invoices that do not pass these checks require manual review. Once the invoice reviews are complete, invoices are batched twice a week and transferred to USAC's Finance Division for disbursement through the U.S. Treasury. Similar to the Funding Commitment process, invoice reviews and the authorization for payment requires a distinct series of checks and balances to ensure that invoices are compliant with program rules and avoid improper payments prior to authorizing payment. Contractor will be responsible for processing invoice line item manual reviews.
- 2.1.2.5. Commitment Adjustments: USAC is required to rescind commitments and seek recovery of disbursed funding when it determines that the funding was committed and/or funds were disbursed in violation of FCC rules. This process to adjust a commitment is known as a Commitment Adjustment ("COMAD") action and the process to recover improperly disbursed funds is known as a Recovery of Improperly Disbursed Funds (RIDF) action. COMAD reviews are designed to determine if a rule violation exists, and if so, to rescind and recover funds as necessary. The COMAD and RIDF process is highly regulated and must adhere to a strict set of timeframes that govern the issuance of a series of notifications and requests for payment. After the Commitment Adjustment Letter ("CAL") is issued, the recovery process includes issuing Demand Payment Letters ("DPL"s) and, if payment isn't made, managing the entity's red light status and transferring the debt to the U.S. Treasury for collection. The DPL and red light processes require extensive coordination with other pre and post-commitment process teams. Finally, these processes require extensive financial reporting.
- 2.1.2.6. Other Change Requests: Under some circumstances, applicants and service providers may request other changes to approved funding requests, including changes to the service provider or service substitutions. Contractor staff is also responsible for processing FCC Forms 500, which allows applicants to request additional time to deliver the services, reduce



or cancel funding requests, and to make a variety of other change requests (for example, modifying the contract start and end dates). Other forms processed include service provider change requests (“SPIN Changes”) when applicants need to change service providers for all/part of their approved funding requests and service substitutions when applicants need to change equipment/speeds. At the conclusion of the review, a Revised Funding Commitment Decision Letter (“RFCDL”) is issued, which provides a full explanation of the work that was performed and the decision.

### 2.1.3. General Services

Other support activities currently provided by Contractor include:

- 2.1.3.1. Implementing fraud prevention measures to aid USAC and the FCC in preventing waste, fraud, and abuse in the E-Rate program. Contractor shall immediately notify USAC of any suspected waste, fraud or abuse discovered during performance of the requirements of the awarded Contract. A detailed description of the suspected waste, fraud or abuse activity must be included with the notification.
- 2.1.3.2. The review and processing of FCC forms from prior years required for participation in the program. These reviews include both automated and manual work.
- 2.1.3.3. Account Maintenance – to reflect changes of relationships with service providers, modifications to services, and additional form processing.
- 2.1.3.4. Service Eligibility Reviews – Provide expertise to conduct eligible service review research to determine service/product eligibility under E-Rate program rules and support for internal tools (e.g., databases, training materials, etc.).
- 2.1.3.5. Document Production – general research and production of documents in support of compliance, audit, and law enforcement activities and specific document production for appeals as requested by the FCC, including the batching and packaging of appeals documents and files in specific timeframes. Because this work is requested to support ongoing compliance efforts that have specific timeframes and deliverables, document production must be performed in a timely manner, based on priorities provided by USAC staff.
- 2.1.3.6. Procedure Documentation – to update all procedures throughout the full lifecycle and ensure changes to the procedures are communicated to the Contractor staff.
- 2.1.3.7. Training – to conduct Contractor staff training throughout the year, for the purpose of onboarding reviewers and ensuring existing staff is apprised of procedural and rule changes and is knowledgeable in a cross-functional way and therefore able to assist in balancing workload in support of life cycle fluctuations.
- 2.1.3.8. Systems Support and Process Integration - to participate in requirements gathering, conduct User Acceptance Testing (“UAT”), complete production

verifications, report system defects, and provide end-user maintenance and support of the System(s), where applicable.

- 2.1.3.9. Ad Hoc Report Development - Contractor will develop and deliver ad hoc reports and tools using Tableau to support operations and to assist with form and application reviews. Examples include entity analysis and student counts, applicant and service provider analysis, financial analysis, and forecasting for commitment and application review.

### **3. Volume Expectations and Statistical Information**

**Attachment 6 (Volumes)** represents USAC's historic and current projected demand across services. However, as consumer behavior is uncertain, Contractor must provide tiered pricing in **Attachment 1 (Bid Sheet)** to cover potential for variances in actual volumes.

- Forecasted volumes determined by current operational volumes and historic trends.
- **Note:** all volumes and expected timelines are projections only and USAC has the right to revise assumptions at its sole discretion (e.g., based on any new information USAC may become aware of) and without requiring a Change Order (as defined in Article 1 of **Attachment 10 (Master Services Agreement)**) from Contractor.

### **4. Performance**

#### **4.1. Performance Standards**

Contractor must perform to a high standard and deliver work of consistently high quality. In order to ensure that Contractor meets USAC's requirements, USAC intends to measure Contractor's performance against a variety of Service Level Agreements ("SLAs"). The SLAs are listed in **Attachment 5 (Service Level Agreements)**, which will be made available in the Virtual Reading Room.

The primary performance standards applicable to Contractor are identified below.

- 4.1.1. Contractor shall present itself to all customers as USAC, not as a third-party contractor.
- 4.1.2. Contractor's role shall not be apparent. Only USAC names and logos will be permitted on information distributed, except at the direction of USAC.
- 4.1.3. Contractor's staff will use usac.org accounts for all work performed under the Contract and will store all work on USAC's servers and systems.
- 4.1.4. Contractor shall establish, and agree upon with USAC, performance standards (SLAs) for services that must be maintained in order to provide acceptable customer service and satisfy the scope of work under the Contract. The standards will be calculated monthly, but USAC may request reports daily or multiple times daily, as well as weekly and monthly reports.
- 4.1.5. Copies of complaints and their associated resolutions will be sent to USAC's Vice President of SLD within one (1) day of receipt, unless an urgent complaint arises



that materially affects a broad set of users, in which case the complaint should be sent to USAC and the Vice President, SLD within sixty (60) minutes.

- 4.1.6. Contractor shall evaluate periodically (weekly, monthly, as needed) the sufficiency of the number of reviewers by function in order to ensure maximum coverage, efficiency, and to meet SLAs.
- 4.1.7. USAC shall notify Contractor if any performance standards are not met, and USAC may, if necessary, direct Contractor to submit a revised monthly invoice reflecting liquidated damages.
- 4.1.8. Contractor shall provide a corrective action plan upon receiving a deficiency notice from USAC indicating that Contractor's performance has fallen below agreed upon targets.

#### 4.2. Quality Assurance

The primary quality control and assurance standards that apply to Contractor are identified below.

- 4.2.1. Ensure that all review processes are subject to quality assurance unless specifically exempted in the approved procedures.
- 4.2.2. Contractor line supervisors or quality control staff shall be located on site with the majority of reviewers to conduct quality control measures, including monitoring operational day-to-day service delivery, monitoring performance, escalating problems for resolution, and maintaining technical support relationships.
- 4.2.3. Contractor shall perform the following quality control measures:
  - a. Provide a point of contact for weekly meetings on reporting management;
  - b. Support audit requirements requested by USAC;
  - c. Provide visibility to USAC regarding volumes of reviews by function;
  - d. Outline the process of dispositioning contacts and audits to assess dispositioning quality of reviewers;
  - e. Provide audit remediation research and resolution and other related support as required;
  - f. Identify problems that may arise and propose solutions; and
  - g. Monitor and manage efforts to remedy a failure of performance.
- 4.2.4. Quality audit results shall meet or exceed criteria set by USAC and provided to Contractor. Quality should focus on reviewer behaviors, accuracy of decisions, and adherence to the approved procedures.
- 4.2.5. Contractor shall facilitate and allow USAC access to Contractor screen data displaying real time contact activities (e.g., all volumes, number of reviews by function, number of reviews complete by level and type, application review forecasts, available staff, etc.). The screen display will be available for remote use by USAC.





- 4.2.6. Contractor will provide continuous quality assurance and quality improvement through:
  - a. Identification and application of best practices from its other operations; and
  - b. Implementation of concrete programs, practices, and measures designed to ensure, at a minimum, that the services are performed in accordance with the agreement and to improve service levels.
- 4.2.7. Contractor shall develop and implement a Quality Assurance Surveillance Plan (“QASP”) to be mutually agreed on by USAC and Contractor at contract signing, to be revised as requested by USAC. The QASP shall include metrics and performance standards that measure the quality of Contractor's performance and compliance with Contract requirements.

### 4.3. Vendor Governance

- 4.3.1. USAC intends to govern Contractor primarily through two key committees: the Strategic Board and the Operational Board.
- 4.3.2. The Strategic Board will provide executive-level governance of USAC's relationship with Contractor, and will have the following characteristics:
  - 4.3.2.1. The Strategic Board will be chaired by the Vice President of Schools and Libraries (USAC) and other members will include various USAC Schools and Libraries Division Directors and certain Key Personnel (Contractor), and other participants as required (e.g., program staff and project managers).
  - 4.3.2.2. The Strategic Board will meet monthly for six (6) months, beginning at execution of the Contract, and every three (3) months thereafter (or on the request of any member, subject to approval by the Chairperson).
  - 4.3.2.3. The Strategic Board will have the following functions:
    - a. Review status and performance of the agreement.
    - b. Discuss and define new strategies.
    - c. Provide executive governance; conduct high level monitoring of project goals, Key Performance Indicators (KPIs), and service levels.
    - d. Make decisions on gainsharing and contractual adjustments / amendments (CSLAs, KPIs), including the expectation that CSLAs and/or KPIs may be adjusted to match process improvements annually.
    - e. Consider and resolve issues elevated by the Operational Board.
- 4.3.3. The Operational Board will provide operational governance of USAC's relationship with Contractor, and will have the following characteristics:
  - 4.3.3.1. The Operational board will be chaired by the E-Rate Directors of Operations (USAC). Other required members will be Contractor’s Key Personnel as well as other Schools and Libraries Division staff.



- 4.3.3.2. The Operational Board will meet weekly beginning at the start of the contract. Upon mutual agreement, the cadence of the meeting may change after the initial stand-up period for the contract.
- 4.3.3.3. The Operational Board will have the following functions:
  - a. Monitor operations and measure performance based on key reports, SLAs, workload consumption plan (actual vs. plan), etc.
  - b. Analyze critical issues/problems; escalate to the Strategic Board as appropriate.
  - c. Ensure quality output/processes and problem solve as required.
  - d. Ensure compliance with USAC standards and requirements including review of business rules for acceptable eligibility documents.
  - e. Discuss and resolve issues brought by the Project Manager/ Problem Manager.
- 4.3.4. USAC intends to hold weekly meetings with Contractor during the ramp-up phase.
  - 4.3.4.1. Weekly meetings will include the Vice President of the Schools and Libraries Division, USAC SLD Directors, and other members will be the Project Director (Contractor), Operational Manager (Contractor), Training / QA Manager (Contractor), Information Technology Manager (Contractor), and other participants as required (e.g., USAC Schools and Libraries staff, additional Contractor staff).
  - 4.3.4.2. Meetings during the ramp-up will focus on the following functions:
    - a. Monitor set up of Contractor work site, including staffing, and activities to transition from prior BPO contractor (if needed).
    - b. Ensure smooth integration of all platforms.
    - c. Ensure quality set-up of work site and problem solve as required.
    - d. Ensure compliance with USAC standards and requirements.
    - e. Ensure robust development and delivery of initial training of reviewers and managers to meet the quality and SLA standards in the Contract.
- 4.3.5. Contractor should expect to conduct quarterly business reviews with USAC leadership to review performance, discuss process improvement and share outlook for upcoming quarter performance. Such meetings may occur more frequently, especially at the beginning of the contract, and are at USAC's discretion.

#### 4.4. Continuous Improvement Standards

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

- 4.4.1. Contractor shall stand up a CI team with clear governance for the entire CI process, as agreed to by USAC.



- 4.4.2. Contractor shall stand up a process to collect feedback from key external stakeholders, including customer satisfaction surveys, to be approved by USAC before launch.
- 4.4.3. Contractor shall facilitate alignment among internal stakeholders at USAC on CI objectives.
- 4.4.4. Contractor shall define and quantify expected and measurable quality and efficiency benefits of improvement initiatives.
- 4.4.5. Contractor shall set up regular monthly meetings to review the improvement initiatives and their measurable impact.
- 4.4.6. Contractor shall assess the initiatives and plan for the implementation of selected initiatives.
- 4.4.7. Contractor shall track and publish the measured impact of implemented initiatives to USAC.

## 5. Transition Plan

Contractor must include in its proposal a comprehensive plan to transition operations of BPO Services from USAC and/or the incumbent, as applicable, including, but not limited to, the following topics:

- 5.1.1. Identification and preparation of facility location(s), including:
  - 5.1.1.1. Procurement, purchase and installation of furniture, equipment, telephone, and data lines;
  - 5.1.1.2. System security and security aspects related to a safe environment for staff;
  - 5.1.1.3. Statement on Auditing Standards No. 70 ("SAS70") facility audit requirements; audit results must be provided to USAC;
  - 5.1.1.4. Transfer and organization of documentation;
  - 5.1.1.5. Transfer of electronic data;
  - 5.1.1.6. Trunking setup and configuration (e.g., Time-division Multiplexing, Session Initiation Protocol);
  - 5.1.1.7. Coordination of enabling or disabling login and / or accounts;
  - 5.1.1.8. Implementation of standard operating procedures, generally accepted accounting procedures, audit standards, privacy standards and IT system security in compliance with **Attachment 7 and the Privacy and Security Addendum of Attachment 10**; and
  - 5.1.1.9. Staff training.
- 5.1.2. Risk analysis and proposed solution(s) and/or mitigation strategy, including an assessment for the transition.
- 5.1.3. Staffing.



- 5.1.4. Hardware and software tools, including platforms utilized.
- 5.1.5. End-to-end performance testing (test period to begin during the transition period), which shall assess the complete business process including, at a minimum:
  - 5.1.5.1. Testing with existing system applications and services as appropriate.
  - 5.1.5.2. Validating of system set-up for transactions and user access;
  - 5.1.5.3. Confirming use of system in performing business processes;
  - 5.1.5.4. Verifying performance of business critical functions;
  - 5.1.5.5. Confirming integrity of business process, data, services security, and end product;
  - 5.1.5.6. Verifying all requirements of the RFP have been met;
  - 5.1.5.7. Identifying performance speed; and
  - 5.1.5.8. Identifying error and/or failure rate(s).
- 5.1.6. If it is determined that the scheduled end-to-end performance test period does not allow for all business processes to be tested, then Contractor will, at no charge to USAC, provide resources necessary to correct problems of the system and services for an additional period, until the system is free from performance problems and meets all specifications as defined in the Contract. If performance problems or specification problems continue, liquidated damages may be assessed.
- 5.1.7. Contractor will also be required to provide a ramp down plan for the end of the Contract Term. This plan shall document and demonstrate how the services and operations provided to USAC by Contractor will be transferred to USAC or to another vendor, if USAC chooses not to renew the relationship with Contractor. The plan shall include, but not be limited to, knowledge transfer, training, and technical support for the handover.

## **6. Training**

- 6.1.1. All training costs, except those specifically identified as otherwise, are the responsibility of Contractor. USAC will not accept any separate invoicing for training and/or associated expenses.
- 6.1.2. USAC will support initial training, including onsite meetings and training classes and resources and support as needed. This training will start at the beginning of the onboarding period unless otherwise determined by mutual agreement of USAC and Contractor. Train-the-trainer sessions, as needed, will run concurrently during this period of time.
- 6.1.3. As required, additional training will be provided by USAC. Examples of when additional training might be required include:
  - 6.1.3.1. If the program rules change for any reason;
  - 6.1.3.2. Annual procedures updates;
  - 6.1.3.3. When quality improvements are implemented or to address quality concerns; or



- 6.1.3.4. If a one-time event occurs that requires special training to handle properly.
- 6.1.4. Contractor's supervisors/trainers shall work with USAC staff to review Contractor-created training manual. USAC will review and approve all training materials.
- 6.1.5. Contractor shall train and manage review staff as follows:
  - 6.1.5.1. Contractor shall develop, conduct and maintain a comprehensive and continuous training program providing trainers and staff with the appropriate knowledge and current information to perform services required by USAC.
  - 6.1.5.2. Contractor shall ensure that all staff are trained in applicable policies, procedures and operations.
  - 6.1.5.3. Contractor shall develop and update training manuals and training records for USAC review and approval.
  - 6.1.5.4. Contractor shall implement a procedure for ongoing refresher training, updated for retraining of information as needed.
  - 6.1.5.5. Contractor shall implement a procedure for certifying all reviewers prior to beginning reviews for a new funding year, to ensure that they fully understand all changes made in the procedures for the new year.
  - 6.1.5.6. Contractor shall have a dedicated trainer onsite to conduct training that will be monitored by USAC.
  - 6.1.5.7. Contractor shall conduct a Security, Safety and Conduct training that will include, but not be limited to:
    - a. Compliance training, to include accessibility / Section 508 compliance, privacy and information security;
    - b. Sensitivity awareness;
    - c. Projecting a positive and helpful attitude;
    - d. Communicating with confidence and competence;
    - e. Adhering to confidentiality policies and procedures;
    - f. Customer service soft skills; and
    - g. Data and security training.
  - 6.1.5.8. Contractor shall conduct program rules training that will include, but not be limited to program rules, as they pertain to the application and funding process.
  - 6.1.5.9. Contractor shall provide manual review training that will include, but not be limited to:
    - a. Schools and Libraries' procedures (which will be provided by USAC to the Contractor);
    - b. Standards of review for specific documents; and
    - c. Signs of waste, fraud, and abuse (e.g., to enable reviewers to recognize and report potential fraud).
- 6.1.6. USAC shall update the managers/trainers on an as-needed basis with respect to policy updates. USAC may also support provision of current reference materials and updates as needed.

- 6.1.7. Any training of Contractor managers /trainers required for new projects or new subject matter throughout the term of the contract shall be at the cost and responsibility of Contractor.
- 6.1.8. Whenever new projects are introduced, USAC and Contractor managers / trainers shall evaluate the quality standards and time required to train staff.
- 6.1.9. Training can be formal in a classroom setting or on-the-job training as mutually agreed to by USAC and Contractor.

## **7. Deliverables And Reporting Obligations**

The following minimum Contractor deliverables and duties will be identified in the executed contract:

- 7.1.1. Contractor shall provide leadership staff to participate in meetings via conference call with USAC staff, to be held as required, in order to discuss business trends, issues, or any other pertinent information.
- 7.1.2. Contractor shall be capable of generating customized reports in Tableau based on published data sources.
  - a. Contractor shall generate reports as required by USAC, whether on a regular or one-time basis.
  - b. USAC will maintain and update the Tableau data sources as needed.
  - c. Requests for updates to published data sources will be initiated via a JIRA ticket using the Atlassian ticketing system
- 7.1.2.1. Reports shall include, at a minimum, the SLAs and quality metrics in **Attachment 5** and progress and updates on executing the Transition Plan.
- 7.1.2.2. Contractor shall also provide USAC with the required FISMA reports and updates.