

**Universal Service Administrative Co. (USAC)
SL-25-034 – Schools and Libraries Business Process Outsourcing (BPO) Services
Questions & Answers**

| Q# | Question | Answer |
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| 1 | Can we request the Government for the Incumbent vendor's Name & their contract number (which is currently underperformance)? | USAC does not disclose details of current contracts as this information is confidential. Please note that 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. |
| 2 | What is the total award value (size) of the current contract, which is presently ongoing by the Incumbent vendor? | Please see Answer to Question #1. |
| 3 | Would it be possible to provide the amount of time (minutes) it would take for staff to complete each step of the process? | Please see Q&A posted in Virtual Reading Room. |
| 4 | Could USAC share the average number of staff that have been required to deliver this RFP scope in the past? | Contractor staffing may fluctuate seasonally to meet certain deadlines or to address in bound form volumes associated with E-Rate Program deadlines. With upwards of 36,000 applications for funding yearly and the associated post-commitment and invoicing transactions with their associated deadlines for completion, Contractor is expected to provide sufficient staffing to complete work consistent with service level agreements. |
| 5 | Can the Contractor bill for the training hours described in SOW 2.1.4.7? | Contractor's administrative costs should be reflected in the FFP aspect of their price proposal. |
| 6 | Attachment 6: Volume Expectations and Statistical Information/Pages 1 & 2 – What is Average Handling Times for the tasks indicated? | Please see Q&A posted in Virtual Reading Room. |
| 7 | How many FTEs is the incumbent Contractor using to complete all aspects of the USAC School and Library BPO requirements? What are labor categories of these FTEs? | USAC does not provide information regarding incumbent contractors. |

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| 8 | The Transition Milestone Plan described in Attachment 9 is essentially an incentive based transition plan providing a framework for the fees to be paid by the contractor and later reimbursed by USAC as transition milestones are met. Applying these reimbursed costs to the fixed element of pricing unfairly advantages the incumbent who already has an operational facility that meets USAC requirements. Would USAC consider removing the fixed transition costs from the overall price component of source selection evaluation to more fairly evaluate the price between bidders? | As stated in the RFP, Contractors are encouraged to propose additional creative pricing structures that will be cost-effective for USAC. |
| 9 | RFP/Page 12: Is the ongoing training and staff development program for all reviewers and managers taught virtually or in-person? If in-person can it be developed delivered as virtual training? | Remote work is not authorized under the Contract. All Contractor BPO operations under the Contract must be performed from Contractor offices. |
| 10 | RFP/Page 12: Will the metrics that have been collected and used by the incumbent be made available to the new contractor during transition? | USAC maintains and monitors Contractor performance per the contract requirements and metrics can be made available to the new Contractor during transition. |
| 11 | RFP section 1.2 states that the vendor will only process forms in EPC and USAC will handle all legacy applications, which contradicts 2.1.3 of the SOW. Can you please confirm if vendor is expected to process applications in legacy IT systems? | USAC will process any legacy applications, including appeals, post-commitment transactions, and/or invoices. USAC does not have an expectation that Contractor will need to process any E-Rate transactions in E-Rate legacy IT systems. |
| 12 | SOW- 2.1.1.3 PIA Highly Complex Application Reviews: Please provide historical annual volume for Highly Complex Application Reviews. | Please see Q&A posted in Virtual Reading Room. |

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| 13 | SOW- 2.1.1.4 PIA Heightened Security Reviews: Attachment 6 Volumes includes total HS reviews. Please provide historical volume for Simple, Moderate and Complex HS reviews. | Please see Q&A posted in Virtual Reading Room. |
| 14 | SOW- 2.1.2.3 Entity Updates: Please provide historical volume of entity updates. | Please see Q&A posted in Virtual Reading Room. |
| 15 | SOW- 2.1.4.5 Document Production: Please provide historical volume and estimated time per document production request. | Please see Q&A posted in Virtual Reading Room. |
| 16 | Attachment 5 – SLA: Please provide historical volume for customer service cases. | Please see Q&A posted in Virtual Reading Room. |
| 17 | Virtual Reading Room 21 - Technical Services Team: Please provide historical volume of inquiries and/or number of FT resources supporting this function? | Please see Q&A posted in Virtual Reading Room. |
| 18 | SOW- 2.1.2 Post-Commitment Reviews: "The post-commitment review processes follow a similar pattern to PIA reviews, with up to four (4) possible levels of review". Is the expectation that all post commitment reviews (Form 486, Appeals, Entity Updates, Invoicing, COMAD, and other change requests) undergo Level 1, Level 2, and possibly Level 3 QA vendor review? If so, what is the average review time for each post commitment type and level of review? | USAC does not have data on average time intervals for each level of review. Refer to response for Question #36 for overall times. |
| 19 | SOW- 2.1.2.4 Invoicing: "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." Please provide the historical volume of invoices that did not pass the compliance check and required manual review? | Please see Q&A posted in Virtual Reading Room. |

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| 20 | SOW- 4.2.3.b Quality Assurance: Please define 'audit requirements', the Contractor's involvement, and estimated Contractor hours dedicated to this activity per calendar year. | USAC undergoes internal and external audits reviewing its administration of the universal service fund and its programs. This includes Contractors who perform BPO services on behalf of USAC. Contractors shall assist where needed in providing auditors with requested data and documents to fulfill USAC's audit requirements. Typically, this may require 250 to 300 hours of the Contractor's time annually. |
| 21 | RFP- p10 Section 2.4: "Offerors are encouraged to present additional creative pricing options that may prove more cost-effective for USAC than the two (2) options requested." Are offerors permitted to submit multiple separate proposals with only the accepted proposal incorporated into any resulting contract? Or are you requesting a single proposal that would describe the creative alternatives with only separate pricing presented for each alternative proposed? | USAC will accept alternative price narratives as separate tabs on Attachment 1: Bid Sheet. |
| 22 | Attachment 4: Do staff (both Key and non-Key) require SCA, Clearances, Citizenship, etc.? | 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. See RFP section 5.8 Key Personnel. |
| 23 | Attachment 2, Section 5: What is the average training time for previous review staff? | Initial staff training may take from two to four weeks with continued training as staff gains experience across different types of reviews and different complexity levels. Ongoing remedial training may be required. |
| 24 | RFP 1.2: What is the existing technological infrastructure? | The majority of these processes are supported by USAC's information technology ("IT") information system and the E-Rate Productivity Center ("EPC"), which is a cloud-based portal used by both internal and external users. |

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| 25 | RFP 6.10.B.7.3: Can USAC please provide examples of fraud protection measures in use today? | USAC does not provide information regarding its fraud protection measures and internal controls. Contractor is asked to describe its fraud prevention capabilities in similar work. |
| 26 | RFP 1.2: What technology solution is currently utilized to facilitate 'Contractor screen data' reviews? | Current screen share technology leveraged to view contract screen data is Cisco's Webex. |
| 27 | RFP 1.2: What languages will be used within the applications that are submitted? | English is the language used in applications and forms submitted to USAC. |
| 28 | Attachment 8: Can USAC please provide the breakdown of current contractor resources on staff per type of review? | USAC does not provide information regarding incumbent contractors. |
| 29 | RFP 1.6.A: "Telework is not authorized under the Contract." Can USAC confirm their policy on remote work on an as needed basis? | Remote work is not authorized under the Contract. All Contractor BPO operations personnel under the Contract must work from Contractor offices. |
| 30 | Attachment 2, Section 2.1.1: "Approximately 36,000 funding applications with over 55,000 individual funding requests are submitted annually." Are these submitted electronically or via paper mail? If paper mail, does the scope of work include receiving, opening, and scanning the paper applications? | All FCC Funding Requests are filed electronically. There is no paper submission that requires opening and scanning of paper applications. |
| 31 | Attachment 2, Section 2.1.1: "The review is managed through EPC and requires manual effort, which includes communicating with applicants, generally through EPC, but sometimes also by phone," Are phone calls completed using USAC-provided telephony equipment or is the Vendor expected to bring a telephony platform for making these calls? | The Contractor must provide telephony equipment. In performing the Services, Contractor shall provide a turn-key, full service operation to include, but not be limited to: facilities; equipment, including telephone instruments, related lines, and cable; telephone service; personal computers; Software (other than USAC Software); circuits; staff; training; setup, testing; and reporting. Contractor shall be responsible for the installation of the required cable and wire at any of its facilities. |

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| 32 | Attachment 2, Section 2.1.1: “Reviews can include a four (4)-level review process.” How long does each level of review typically take? What is the volume of applications that typically end up needing the manual review process? | Please see Q&A posted in Virtual Reading Room. |
| 33 | Attachment 2, Section 2.1.1: “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.” Are applications returned to the initial reviewer via workflow routing in EPC? | Yes, applications are returned to Initial Review via workflow routing in EPC. |
| 34 | Attachment 2, Section 2.1.1: Are there annual volumes available for each review listed below? Also are average times to complete each type of review available? PIA Application Review PIA Service Review PIA Highly Complex Application Reviews PIA Heightened Scrutiny Reviews (Simple, Moderate, and Complex) | Please see Q&A posted in Virtual Reading Room. |
| 35 | Attachment 2, Section 2.1.1: “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.” Will USAC be sending the Vendor a file with data for letters the Vendor will then print and mail? | USAC does not need to send the Contractor a file with data for letters for printing and mailing. All FCDLs issued are part of the automated wave process whereby the EPC system issues electronic letters that are sent via email and also stored within EPC. |
| 36 | Attachment 2, Section 2.1.2: Are there annual volumes for each of the 4-types of post-commitment reviews and also average durations for each review? | Please see Q&A posted in Virtual Reading Room. |

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| 37 | Attachment 2, Section 2.1.2.2: "... and preparing a decision letter with supporting arguments based on detailed procedures" Will USAC be sending the Vendor a file with data for letters the Vendor will then print and mail? | Please see Q&A posted in Virtual Reading Room. |
| 38 | Attachment 2, Section 2.1.2.5: "After the Commitment Adjustment Letter ("CAL") is issued, the recovery process includes issuing Demand Payment Letters ("DPL"s)." Will USAC be sending the Vendor a file with data for letters the Vendor will then print and mail? | Please see Q&A posted in Virtual Reading Room. |
| 39 | Attachment 2, Section 2.1.2.6: "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" Will USAC be sending the Vendor a file with data for letters the Vendor will then print and mail? | USAC does not need to send the Contractor a file with data for letters for printing and mailing. All decisions issued are part of the automated wave process whereby the EPC system issues electronic letters that are sent via email and also stored within EPC. |
| 40 | Attachment 2, Section 5: It mentions having a dedicated trainer on-site. If the workers are performing the work remotely, would USAC permit the trainer to be remote as well? | Remote work is not authorized under the Contract. All Contractor BPO operations personnel under the Contract must work from Contractor offices. |
| 41 | Attachment 2, Section 5 mentions a dedicated trainer. Can USAC clarify its receptiveness to utilize a trainer across multiple USAC contracts? | A trainer does not need to be solely dedicated to the E-Rate contract. They may also train on other USAC contracts. Yes, USAC may approve a trainer who is also a trainer on another USAC contract. |
| 42 | RFP Section 3.1.6: Would USAC clarify the expectation around the number of days a week that they expect teams to be available during the regular business hours as stated in the referenced section? | Contractor shall ensure that the review teams are available to program participants Monday through Friday during regular business hours of 8:00 AM – 8:00 PM Eastern Time. |
| 43 | Attachment 2, Section 2.1.1, Section 2.1.2: If IV&V reviews result in rework on an application, can USAC provide the volume and average duration for those tasks? | Please see Q&A posted in Virtual Reading Room. |

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| 44 | <p>Attachment 2, Section 2.1.2: Please provide the volume and average duration for:</p> <ul style="list-style-type: none"> - FCC Form 486 Reviews - FCC Form 500 Reviews - Appeals - Entity Updates - Invoicing - Invoicing Manual Reviews - Commitment Adjustments - Commitment Adjustment Demand Payment Letters - Service Substitution Reviews - SPIN Change Reviews - Compliance Support/Document Production (>10 and 10 documents or less) - Other change requests (detail types and volumes/durations) | Please see Q&A posted in Virtual Reading Room. |
| 45 | Attachment 2, Section 2.1.3: Could USAC please provide volumes and type/complexity for applications that are outstanding for all prior funding years? | USAC will process any legacy applications, including appeals, post-commitment transactions, and/or invoices. USAC does not have an expectation that the Contractor will need to process any E-Rate transactions in E-Rate legacy IT systems. |
| 46 | Can USAC please provide suggested Critical SLAs? | Attachment 5: Service Level Agreements is available in the Virtual Reading Room. In order to access the Virtual Reading Room please email a signed copy of Attachment 8: Confidentially Agreement as instructed in the RFP. |
| 47 | Attachment 2, Section 2.1.4: Can USAC please provide guidance on where to include costs for the tasks included in General Services? | These costs should be included in the Ongoing FFP on Attachment 1: Bid Sheet. |

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| 48 | RFP Section 6.10.C: Can USAC clarify the expectation around the statement "It is expected that the Key Personnel provided according to Attachment 4 (Key Vendor Personnel and Contract Staff Requirements) will have been heavily involved in at least one (1) of the provided examples of past performance."? Is that a hard requirement and will exceptions be made on a case-by-case basis? | USAC is seeking Key Personnel that possesses expertise and extensive experience standing up and operating a BPO. Prior work with similar programs (e.g., government entitlements) or with reaching and / or working with customers whose demographics are similar to the E-Rate base, large and small service providers, and school and library facilities are preferred. |
| 49 | RFP Section 6.10.B: USAC states that past performances will be "evaluated based on Offeror's discussion of its past performance for similar efforts (including a detailed mock-up of costs, project timeline, and illustrative materials from a similar project)". "Mock-up of costs" are not included in the six broad evaluation areas that precede that statement. Could USAC provide clarification around the need for "mock-up of costs" and what that should entail? | The RFP has been updated to request an overview of costs and contract pricing type for past performance of similar efforts. |