Universal Service Administrative Co. (USAC)
USAC-26-009 – Customer Service Center and CRM O&M BPO Services
Questions & Answers

Q#	Question	Answer
1	Has the current contract gone full term?	USAC does not provide details regarding current contracts.
2	Have all options to extend the current contract been exercised?	Please see answer to Question #1.
3	Who is the incumbent, and how long has the incumbent been providing the requested services?	Please see answer to Question #1.
4	To what extent will the location of the bidder's proposed location or headquarters have a bearing on any award?	USAC evaluates proposals based on the criteria detailed in RFP Section 8. EVALUATION CRITERIA on Pages 20 to 23.
5	How are fees currently being billed by any incumbent(s), by category, and at what rates?	Please see answer to Question #1.
6	What estimated or actual dollars were paid last year, last month, or last quarter to any incumbent(s)?	Please see answer to Question #1.
7	What is the minimum required total call capacity?	20 active calls and 20 IVR waiting calls – the system should be able to scale to spikes in volume.
8	What is the minimum simultaneous inbound call capacity?	20 active calls and 20 IVR waiting calls – the system should be able to scale to spikes in volume.
9	What is the maximum hold time?	The current Average Time to Answer SLA is 90 seconds; however, there is no maximum hold time.
10	Is there a minimum or maximum number of operators and supervisors?	USAC does not set this number, but the Vendor should be able to meet all SLAs under their staffing levels. Current level: • 5 supervisors • 15 agents fully dedicated

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11	What is the required degree of dedication for the call center? (Can the call center work on other contracts at the same time as this one)?	Other than Key Personnel, USAC does not set the degree of dedication, but the Vendor should be able to meet all SLAs under their staffing model.
12	What was your average monthly call volume over the past year?	Call volumes are available on Attachment 4 – Case Volumes & Critical SLA Metrics.
13	What is the current average wait time for phone calls?	This information is available on Attachment 4 – Case Volumes & Critical SLA Metrics.
14	What is the current average handle time for phone calls and other types of communications?	This information is available on Attachment 4 – Case Volumes & Critical SLA Metrics.
15	What is the current average after-call work time for operators?	USAC requires only a small amount of after-call work which does not significantly increase the average handle time.
16	Over the past year, what is the percentage of calls received in English versus non-English?	USAC only requires English and Spanish agents be available. Typically, USAC receives only a small number of Spanish calls/emails per year. One bi-lingual agent/supervisor should suffice, and if none are available, a callback within 1-business day is needed.
17	Over the past year, what percentage of calls received were in Spanish?	USAC only requires English and Spanish agents be available. Typically, USAC receives only a small number of Spanish calls/emails per year. One bi-lingual agent/supervisor should suffice, and if none are available, a callback within 1-business day is needed.

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18	What time of day, days of the week, or times of the year do calls typically peak?	USAC sees daily peaks midday when we receive calls from both the East coast and the West coast. We also see peaks in volume in the two weeks leading up to major filing deadlines. • E-Rate Funding Request Filing Window (Q1-2 of each year) • E-Rate Admin Window Close (Q1 of each year) • E-Rate Invoicing Filing Deadline (Q4 of each year) • E-Rate Form 486 Deadline (Q2 of each year) • RHC Funding Request Filing Window (Q1-2 of each year) • RHC Invoicing Filing Deadline (Q4 of each year) • High Cost HUBB Filing (Q1 of each year) • Contributor Form 499 Deadline (Q1-2 of each year)
19	Please reconfirm the due date for this procurement by providing it in response to answers to questions.	Proposals are due no later than 11:00 AM ET on April 28, 2026.
20	If there was a previous solicitation for these services, what was its title, number, release date, and due date?	Please see the award notice located at: https://www.usac.org/wp-content/uploads/about/documents/Procurement/USAC-Award-Notice-USAC-21-030.pdf
21	Why has this bid been released at this time?	The current contract's period of performance is ending, necessitating a recompete of the services.
22	Are bidders permitted to deviate in any way from any manner of quoting fees you may be expecting? For example, if there is a pricing page in the RFP, can bidders submit an alternate fee structure? If there is no pricing page in the RFP, do you have any preference for how bidders should quote fees or can bidders create their own pricing categories?	As stated in the RFP, 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.
23	Please describe your level of satisfaction with your current or recent vendor(s) for the same purchasing activity, if applicable.	Please see answer to Question #1.

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24	Could you please confirm whether there is any possibility for participation if a Customer Service Center operates from offices outside the United States, potentially through a U.S.-based prime contractor or approved subcontracting structure?	No. As stated in the RFP, Vendor and its reviewers, staff and employees working on the USAC account must be located within the United States. This includes the physical location of Vendor's operations.
25	How many CSR personnel you are looking to respond to the customer calls?	Contractor is expected to provide sufficient staffing to complete work consistent with service level agreements and the requirements outlined within the RFP and its associated attachments.
26	The RFP references USAC's requirement for prior written approval before delegating work to subcontractors. If subcontractors are identified in the proposal, will they be considered pre-approved upon award, or will separate post-award approval still be required prior to commencement of work?	Approved subcontractors will be written into the Master Services Agreement prior to contract execution. Offeror will be notified prior to intent to award if a subcontractor is not approved.
27	Should each of the three required project examples demonstrate both Customer Service Center (CSC) and CRM Operations & Maintenance (O&M) capabilities within the same engagement, or may offerors submit a combination of projects that separately demonstrate CSC and CRM O&M experience?	A combination of projects that separately demonstrate CSC and CRM O&M experience is acceptable.
28	What version(s) of Microsoft Dynamics 365 are currently deployed, and is the environment cloud-based, hybrid, or on-premises?	Server version: 9.2.26022.00170 Client version: 1.4.11604-2602.2 The environment is cloud-based
29	What existing CSC and CRM system documentation (architecture diagrams, data models, runbooks, integration specs) will be provided, and are there known gaps?	Documentation required for NIST 80053, ATO, and FISMA compliance is available. Additional documentation may be provided as needed, though some areas may have limited detail.

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30	To what extent has Dynamics been customized (custom entities, plugins, workflows, Power Automate, scripts), and are there modules that may impact maintainability or upgrades?	The system includes light customization, primarily through Power Automate flows and minimal configuration changes. No significant custom modules exist that would hinder maintainability or upgrades.
31	Please provide a list of third-party tools and applications integrated with Dynamics, including any licensing or vendor dependencies.	OKTA is used for authentication, and CITRIX is used to support non-desktop access.
32	What systems are integrated with Dynamics and what methods are used (APIs, middleware, batch processes)?	Splunk is integrated for log monitoring. The team is also evaluating CyberArk for credential and secrets management.
33	How many environments exist and what release management and CI/CD processes are currently in place?	Approximately 5–6 environments exist, including 1 production and standard lower tiers (development, testing, etc.). Basic configuration management is performed using Azure DevOps, and Bamboo has been evaluated for CI/CD support.
34	Are there known performance issues, backlog items, or technical debt areas that the contractor should address?	There are approximately 33 active backlog items of varying complexity that may require review and remediation.
35	What security model and compliance requirements apply to the Dynamics environment?	The environment follows the Shared Responsibility Model and adheres to NIST SP 80053 and NIST SP 80037 compliance requirements.
36	Will the incumbent provide knowledge transfer, and are there planned upgrades or migrations during the period of performance?	During the transition period, the current Vendor and USAC will work with the new Vendor to provide all necessary information and knowledge.
37	Could we deliver the services from a nearshore center as your requirement is for Spanish and English language or do you want the vendor to have an onsite presence for delivery?	No. As stated in the RFP, Vendor and its reviewers, staff and employees working on the USAC account must be located within the United States. This includes the physical location of Vendor's operations.
38	What are the pain points with the current operation?	N/A

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39	Please provide the current agent profile(s) for the different support types and tiers (job description and agent skill set requirements).	USAC allows the Vendor to develop the appropriate job descriptions and agent skillset requirements to meet all SLAs.
40	What is the current product training durations, classroom/nesting, and monthly recurrent training for each of the programs in scope?	USAC allows the Vendor to develop the appropriate training programs and materials for agents and managers to meet all SLAs. USAC will conduct onboarding for the Vendor to develop these materials.
41	Are there existing training materials in place? Is the material updated? What mediums are used during training?	USAC allows the Vendor to develop the appropriate training programs and materials for agents and managers to meet all SLAs. USAC will conduct onboarding for the Vendor to develop these materials.
42	What is the length of the Train-the-Trainer session?	USAC expects to conduct 1-2 weeks of onboarding with the Vendor so that they can develop the appropriate training programs and materials for agents and managers to meet all SLAs.
43	Is there a training database?	USAC will provide all onboarding materials via SharePoint.
44	Is training completed on live systems? If so, how many systems?	USAC would conduct onboarding in a UAT environment, and the Vendor would conduct training for agents and managers in the same UAT environment.
45	Is the training systems-intensive, product-intensive, etc.?	All training is system and programmatic intensive – USAC does not offer or sell products.
46	What is the state of the current Knowledge base and agent scripts?	The current knowledgebase contains 1,358 articles and is updated regularly.

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47	What is the current agent headcount by program?	USAC works with a cross-training model for which most agents and supervisors are trained across multiple programs. The figure below covers the total number of agents/supervisors trained per program: • E-Rate = 13 agents / 3 supervisors • FinOps = 7 agents / 2 supervisors • High Cost = 7 agents / 2 supervisors • Rural Health Care = 7 agents / 2 supervisors 12 agents and 4 supervisors are cross-trained for more than one program.
48	Is cross skilling currently in place across all programs?	Yes
49	What is the current agent occupancy percentage of the different programs?	This is up to the discretion of the Vendor based on their staffing plan.
50	What are the most common reasons for turnover at your location?	There is very little turnover for agents and supervisors at this time.
51	Are Quality guidelines in existence? If so, could you provide a copy?	USAC will work with the Vendor to adopt all quality and performance guidelines.
52	What are the reporting requirements and desired frequency of each report?	Reporting requirements are outlined in Section 5 of the RFP. Additional reports and frequencies of those reports can be discussed and agreed upon by USAC and the awarded Vendor.
53	What is the average percentage of cases/calls that require a transfer to a tier 2 team for resolution?	Approximately, 19% of all cases are escalated to USAC. All other cases are handled by CSC agents and supervisors.
54	What is the volume or percentage for Spanish interactions?	USAC only requires English and Spanish agents be available. Typically, USAC receives only a small number of Spanish calls/emails per year. One bi-lingual agent/supervisor should suffice, and if none are available, a callback within 1-business day is needed.

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55	What type of IVR (site or network based) is required and number of ports? Please provide an IVR tree diagram.	USAC will work with the Vendor to setup and draft scripts for the IVR.
56	What are the non-negotiable MSA terms for USAC?	USAC will review changes or additions to the Master Services Agreement that are included in Offeror's proposal. USAC will communicate any unacceptable exceptions to Offeror after review of the exceptions submitted with Offeror's proposal.
57	Can USAC please confirm whether there is an incumbent contractor currently providing Customer Service Center (CSC) services and/or CRM Operations and Maintenance support for this requirement? If so, please provide the incumbent contractor name(s), contract number(s), period of performance, and approximate contract value.	USAC does not provide details regarding current contracts.
58	Can USAC please confirm whether CSC operations and CRM O&M services are currently performed by a single incumbent contractor or by multiple vendors? If multiple vendors are involved, please identify which vendor performs CSC services and which vendor performs CRM O&M.	USAC does not provide details regarding current contracts.
59	Can USAC please confirm whether there is an existing Customer Service Center currently supporting the programs within the scope of this requirement? If so, will the successful contractor have the option to procure elements of the existing service center environment from the incumbent (e.g., facilities, infrastructure, systems, or operational processes)?	Yes, USAC operates current customer service centers for E-Rate, High Cost, Rural Health Care, and FinOps. The RFP outlines which portions of customer service operations will be transitioned to the new Vendor and which portions are required to be provided by the new Vendor.

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60	Does USAC require the Customer Service Center to operate from a dedicated physical location, or may the contractor utilize a distributed or virtual contact center model?	The Customer Service Center must be operated from a dedicated physical location.
61	Can USAC confirm whether the contractor will be required to utilize an existing USAC CRM platform or provide and implement its own CRM solution?	As stated in the RFP, USAC utilizes Microsoft Dynamics 365.
62	What level of system integration will be required between the contractor's customer service tools and USAC systems such as EPC, HUBB, RHC Connect, MyPortal, E-File, and Tableau?	The only integration will be between the vendors IVR/phone system and the Dynamics CRM. Other USAC systems and tools are not integrated into the CRM at this time.
63	Will USAC provide an existing knowledge base or standard operating procedures that the contractor will maintain, or will the contractor be responsible for developing the knowledge base from scratch?	The knowledgebase is contained within the Dynamics CRM and will be fully available to the awarded Vendor.
64	Are there seasonal spikes in contact volume associated with program deadlines (e.g., E-Rate filing windows)? If so, can USAC provide expected surge volumes?	USAC sees daily peaks midday when we receive calls from both the East coast and the West coast. We also see peaks in volume in the two weeks leading up to major filing deadlines. • E-Rate Funding Request Filing Window (Q1-2 of each year) • E-Rate Admin Window Close (Q1 of each year) • E-Rate Invoicing Filing Deadline (Q4 of each year) • E-Rate Form 486 Deadline (Q2 of each year) • RHC Funding Request Filing Window (Q1-2 of each year) • RHC Invoicing Filing Deadline (Q4 of each year) • High Cost HUBB Filing (Q1 of each year) • Contributor Form 499 Deadline (Q1-2 of each year)

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65	Can USAC provide current or historical staffing levels supporting CSC operations, including the number of agents, supervisors, and support personnel?	Based on the call, email, and web inquiry volume provided, USAC requests Offerors to provide estimates on the best number of agents to ensure proper coverage, quality responses, and low wait times.
66	The RFP states that the Key Personnel provided according to Attachment 6 are expected to have been heavily involved in at least two (2) of the provided past performance examples. Given that the RFP requires ten (10) Key Personnel roles (six for CSC and four for CRM), requiring each individual Key Person to have participated in at least two past performance examples may be unnecessarily restrictive and could limit the ability of offerors to propose the most qualified personnel with relevant expertise across different engagements. Can USAC please confirm whether this requirement may instead be satisfied collectively by the proposed Key Personnel team, such that one or more Key Personnel have been heavily involved in at least two of the submitted past performance examples?	Offeror should submit past performance and key personnel resumes to satisfy the RFP requirements.
67	Can USAC please confirm whether Attachment 9 (Transition Milestones) is required to be submitted after contract award?	Attachment 9 is not required to be submitted by Offeror. The dates submitted by Offeror in Attachment 1 (Bid Sheet) and approved by USAC will be incorporated into Attachment 9 at contract award.
68	The SOW states the Vendor must provide contact center tools (ACD, IVR, routing), while CRM (Dynamics) manages cases. Please clarify system of record and control boundary (case creation, routing logic, reporting ownership).	All cases will be in the Dynamics CRM or E-Rate Productivity Center (EPC). The contact center tools are for receiving and routing phone calls into the CRM.

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69	RFP states Vendor shall not propose proprietary CRM but must operate Dynamics. Should Vendor operate within USAC tenant or provide hosting without tenancy ownership?	The awarded Vendor is expected to operate fully within the USAC tenant.
70	CRM scope is currently limited to complaints/whistleblower. Should Vendor architect for future enterprise expansion and include scalability in pricing?	The CRM contains cases for E-Rate, Lifeline, High Cost, Rural Health Care, and FinOps (Contributors and Service Providers) It also contains Complaints and Whistleblower Alerts. Future expansions are a possibility but are outside the scope of this RFP.
71	Vendor provides turnkey contact center but integrates with USAC systems. Please clarify which systems are authoritative and whether Vendor must host integrations or USAC provides middleware/APIs.	Microsoft Dynamics is not integrated with other USAC systems for customer data. OKTA/Azure AD serves as the authoritative source for user identity and access.
72	What level of API access, documentation, and sandbox environments will be provided for integration with USAC systems (EPC, HUBB, EDW, etc.)?	No integration currently exists between Dynamics and other USAC systems; therefore, no API access or sandbox environments are required for these systems.
73	Vendor must provide real-time reporting access. Should reporting reside in Vendor tools or be integrated into USAC platforms (e.g., Tableau/EDW)?	Currently, USAC utilizes PowerBI dashboards that sit within the Dynamics CRM. The vendor may propose real-time reporting options using PowerBI within Dynamics and other tools.
74	Is there a predefined taxonomy for contact coding or should Vendor define classification standards?	USAC uses a variety of classifications for calls, emails, and call center setup.
75	Knowledge base must be integrated into CRM. Who owns lifecycle governance, approval authority, and platform (Dynamics vs external KB)?	USAC works with the Vendor and our Program staff to maintain and update the knowledgebase.
76	USAC allows alternative models (swarm vs tiered). Should Vendor propose new model or optimize within Tier 0–II structure?	USAC leaves this up to the discretion and expertise of the Vendor.

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77	Telework is not authorized. Is fully on-site staffing mandatory or are exceptions allowed (e.g., DR/COOP scenarios)?	Any exceptions must be submitted to USAC in writing and agreed upon by USAC prior to implementation.
78	Historical volumes provided but not guaranteed. Can USAC clarify expected growth/decline and whether pricing should include volume elasticity protections?	Customer service volumes are impacted by numerous factors. Each USF program has a relative steady stakeholder base, but changes in federal policies, program modernizations, and economic factors can all lead to increases and decreases in volume. USAC leaves factoring this into the discretion and expertise of the Vendor.
79	Contract allows FFP and per-unit pricing. How will USAC evaluate tradeoffs between cost predictability and efficiency?	USAC evaluates proposals based on the criteria detailed in RFP Section 8. EVALUATION CRITERIA on Pages 20 to 23.
80	CRM O&M includes maintenance and enhancements. What is expected release cadence and does Vendor own DevSecOps/CI-CD pipeline?	Yes, the Vendor will own and manage the DevSecOps/CI/CD pipeline. Current release cadence includes approximately two major wave releases per year, quarterly large releases, one-to-three-point releases per quarter, and ad hoc emergency releases as needed.
81	What is expected backlog size and enhancement demand? Should Vendor assume dedicated agile team capacity?	Yes. Vendors should assume a dedicated agile team structure consistent with the staffing model provided in the RFP.
82	Tools must be FedRAMP or FISMA compliant. What authorization level (Low/Moderate/High) is required and can USAC ATO be leveraged?	USAC's existing ATO will be leveraged. The environment operates within Azure Government, which is FedRAMP High authorized.
83	IVR self-service is limited today but may expand. Should Vendor design for future digital/self-service roadmap or current-state only?	There are currently no digital self-service capabilities on the roadmap (e.g., chat, chatbot, customer portal).
84	Vendor owns training costs. What is expected training throughput and will training environments/sandboxes be provided?	USAC will conduct train-the-train and system demos with the awarded Vendor.

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85	During parallel operations (nesting), how will call routing be split and performance measured between Vendor and incumbent?	USAC plans to transition customer service emails first, followed by a program-by-program transition for calls.
86	SLAs referenced but not fully defined. Can USAC confirm targets (AHT, FCR, ASA, CSAT) and which carry financial penalties?	Critical and non-critical SLAs are defined and proposed targets are listed in Attachment 5 – SLA Template.
87	CRM is used by multiple vendors. What is governance model for multi-vendor access and responsibility for conflict resolution/change control?	USAC uses a hybrid delivery model with a single, centrally managed backlog. Work is prioritized through Agile ceremonies to coordinate across vendors and ensure consistent governance.
88	Is Vendor responsible for data migration validation, cleansing, and normalization of historical case data?	All historical customer inquiry data resides within the Dynamics CRM and EPC – there will be no migration of this data.
89	Call recordings retained for 6 months. What is expected storage volume and must data reside in USAC-controlled environments?	Please refer to Attachment 4 for the call volumes and average handle times. Phone call recording must be kept for six (6) months. All other data is kept for ten (10) years. Dynamics CRM storage is covered by USAC. Storage of call recordings and transcripts should be included in any pricing.
90	Spanish support is minimal today. Should Vendor plan for on-demand interpretation and future language expansion?	USAC only requires English and Spanish agents be available. Typically, USAC receives only a small number of Spanish calls/emails per year. One bi-lingual agent/supervisor should suffice, and if none are available, a callback within 1-business day is needed.
91	USAC may expand CRM into HR/finance. How should Vendors price optional expansion and architect for modular growth?	The CRM contains cases for E-Rate, Lifeline, High Cost, Rural Health Care, and FinOps (Contributors and Service Providers). It also contains Complaints and Whistleblower Alerts. Future expansions are a possibility but are outside the scope of this RFP.
92	RFP allows creative pricing options. Will USAC evaluate alternative pricing models (e.g., outcome-based, gainshare), and how will they be weighted against standard FFP/per-unit models?	USAC evaluates proposals based on the criteria detailed in RFP Section 8. EVALUATION CRITERIA on Pages 20 to 23.

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93	Is there a not-to-exceed (NTE) ceiling expected annually, and how will overages due to volume spikes be handled?	As stated in the RFP, each year of the contract will have an overall not-to-exceed ("NTE") price. USAC may consider renegotiating pricing if volumes increase or decrease by more than 10%.
94	Forecasts are provided 6 weeks in advance. What is the acceptable variance tolerance, and who bears risk for forecast inaccuracies?	Forecasting is typically only used to help determine staffing needs during filing deadlines.
95	Are there minimum staffing level requirements or constraints (e.g., minimum FTEs, skill mix ratios)?	No. USAC expects Offerors to propose operational models that they consider optimal.
96	How is schedule adherence measured and penalized, and what thresholds define non-compliance?	The schedule and penalties for missing the agreed upon schedules are outlined in Attachment 9 – Transition Milestones
97	Is a single on-site supervisor sufficient, or are there expectations for layered leadership (e.g., WFM, QA, Ops Managers)?	USAC expects a minimum of two (2) supervisors be available during all business hours. Currently, High Cost and Rural Health Care share supervisors.
98	What are the required labor categories and minimum qualifications for Key Personnel beyond Attachment 6?	The required labor categories and qualifications are outlined in Attachment 6 (Key Personnel). USAC expects Offerors to propose any additional personnel that they consider optimal to provide the services outlined in the RFP.
99	Are Key Personnel required to be dedicated full-time, and what is the process/penalty for replacement?	Key Personnel requirements and information can be found in Attachment 6 (Key Personnel) and Section 7 of the RFP.
100	What incumbent transition support will be provided (documentation, SMEs, shadowing duration)?	The current Vendor will assist in the transition to a new Vendor.
101	Will incumbent vendors be contractually obligated to support transition, or is risk borne by the new Vendor?	Yes, the current Vendor will assist in the transition to a new Vendor.
102	What specific deliverables are required for USAC acceptance prior to cutover approval?	USAC expects Offerors to propose transition milestones outlined in Attachment 9 that they consider optimal to standing up the services. Details of milestone acceptance will be mutually agreed upon in the Contract.

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103	Are there specific architectural standards (e.g., zero trust, segmentation requirements) that must be adhered to?	Yes. USAC maintains architectural standards that must be followed. These requirements will be shared as applicable. Zero Trust principles are currently being evaluated and tested within USAC.
104	Will Vendor systems be subject to continuous monitoring (e.g., CDM, SIEM integration), and what tooling must be supported?	An offering compliant to the RFP requirements means that Vendor systems need to be FISMA authorized as compliant with the NIST Risk Management Framework (RMF) thus, once authorized, continuous monitoring of those systems is required. The Vendor must also support continuous monitoring of the CRM to maintain the existing Authorization to Operate of the CRM system.
105	What level of PII classification is expected (e.g., moderate/high impact), and are there specific data handling constraints?	USAC follows strict guidelines and policies when it comes to PII. All PII handling requirements will be shared with the Vendor and training on handling PII is provided.
106	Are there requirements for transcription accuracy, searchability, or AI-based analytics on recordings?	Yes, all of these features are currently available with the current Vendor and we expect these features would be available in the future.
107	Does USAC have preferred or pre-approved ACD/IVR/contact center platforms, or is Vendor free to propose any compliant solution?	The Vendor may select their preferred platform.
108	Vendor must port phone numbers. Who owns telecom carriers/contracts and associated costs?	USAC maintains ownership of the phone numbers and the Vendor would own the telecom contract and associated costs. The numbers would need to be ported to the Vendor.
109	Are there compliance or union/privacy constraints around call monitoring, whispering, and barging?	No

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110	What baseline quality scoring methodology (e.g., QA scorecards) does USAC currently use?	USAC's baseline quality scoring methodology uses a structured scorecard applied to a random sample set of customer interactions monthly. Scorecards evaluate agents across our channel offerings focusing on key performance measures including (but not limited to) accuracy/issue resolution, compliance adherence, tone and professionalism, and procedural adherence. Each criterion is weighted, and interactions receive a composite score on a defined scale. Scoring is conducted manually using a spreadsheet-based tracking system. Results are used to inform agent coaching, performance reviews, audit compliance, and ongoing quality improvement efforts.
111	What is the minimum acceptable QA score threshold and associated penalties for non-compliance?	USAC seeks 85% average minimum QA scores, however, this is not a critical SLA carrying penalties.
112	Are SLA credits capped monthly or annually, and can multiple SLA failures compound penalties?	SLA credits are not capped and are not compounded; however, USAC expects Vendors to meet the SLA targets and regular failure to meet SLAs may result in contract termination.
113	How are service level credits applied in hybrid pricing models (FFP + per-unit)?	As stated in the RFP, Offeror is asked to propose the exact calculation for each service level credit.
114	What is the escalation path and expected turnaround time for issues requiring USAC SME involvement?	Cases escalated to USAC SMEs are done via assignments to USAC teams in the CRM and individuals in EPC and are considered no longer in the Vendor's queue.
115	What format and frequency of trend reporting is expected (e.g., dashboards, executive briefings)?	USAC expects dashboards, presentations, and written reporting as outlined in the RFP.
116	What CSAT methodology and target scores are expected (e.g., post-call IVR, surveys)?	USAC uses a post IVR survey for phone calls and an email survey for other inquiries.
117	Are there data retention requirements beyond 6 months for compliance or audit purposes?	Phone call recording must be kept for six (6) months. All other data is kept for ten (10) years.

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118	Are there facility certification requirements (e.g., SOC 2, ISO 27001) for Vendor sites?	No, but all facilities must be located in the U.S.
119	What are the physical security requirements for Vendor facilities handling federal data?	USAC provides an overview of security requirements in Attachment 7 (USAC Information Security and Privacy Control Policy).
120	What are the Recovery Time Objective (RTO) and Recovery Point Objective (RPO) requirements?	The Vendor should use industry standards and should propose your RTO times in the recovery plan.
121	Are deliverables subject to formal acceptance criteria, and what is the approval timeline?	All deliverables are reviewed and approval is provided within five (5) business days.
122	What are the penalties for late or rejected deliverables beyond milestone fee reductions?	All rejected deliverables must be corrected and re-delivered. Penalties are outlined in Attachment 9 – Transition Milestones
123	USAC may hire additional vendors. How will responsibilities and SLAs be segmented across multiple vendors?	If multiple vendors are selected, SLAs related to Customer Service and CRM will be segmented to the appropriate Vendor.
124	Will Vendor be required to integrate or interoperate with other CSC or BPO vendors?	There will not be any integration among CSC and BPO vendors. However, cases that require escalation to USAC or data from another system or BPO may require cross communications and/or collaboration.
125	Who owns data reconciliation across systems when discrepancies occur?	Not applicable. Dynamics is not integrated with other USAC systems, so cross-system reconciliation is not required.
126	Are there assumptions regarding inflation, wage increases, or cost-of-living adjustments over the contract term?	Offeror is expected to calculate all overhead costs, including inflation, etc., and incorporate them into their proposal at the time of submission.
127	Are price adjustments allowed in option years, or must pricing remain fixed across all years?	Offeror is expected to determine the pricing of each option year. There is no requirement that each option year must be priced the same.

Q#	Question	Answer
128	RFP; Attachment 2 (Statement of Work); Attachment 1 (Bid Sheet) — Could you map each required activity and deliverable to the correct pricing bucket: Stand-up FFP, Ongoing FFP, or Variable Fee?	Details regarding pricing are provided in the RFP Section 2. CONTRACT / PRICING STRUCTURE
129	RFP; Attachment 2 (Statement of Work); Attachment 1 (Bid Sheet) — Can you confirm that all pre-cutover nesting, shadowing, and parallel-services work is included in Stand-up FFP and not billed as recurring or variable charges before cutover?	Yes, include all pre-cutover work in the stand-up fees.
130	RFP; Attachment 2 (Statement of Work); Attachment 9 (Transition Milestones) — Can you confirm whether the 30-day trial period is part of stand-up/ramp pricing or billed as steady-state operations after cutover?	Monthly pricing begins at the cutover on 12/1/2026.
131	Attachment 2 (Statement of Work); RFP — Can you confirm that Stand-up FFP includes scripts, training plans and manuals, test plans, and external training, website, and communication materials, even where the due date is tied to the Transition Project Plan?	Yes, include all fees related to the transition project plan in the stand-up fees.
132	Attachment 2 (Statement of Work); RFP — Can you confirm that stand-up pricing must cover any live production contacts handled during nesting, along with QA/calibration, transaction reporting, and escalation support that takes place before cutover?	Yes, include all pre-cutover work in the stand-up fees.
133	RFP; Attachment 2 (Statement of Work) — How would you like bidders to split project management and oversight between stand-up and ongoing fixed fees, including CRM PM/PMO responsibilities?	USAC expects Offerors to include only stand-up activities in the stand-up pricing. Ongoing fees should only be included after the cutover date.

Q#	Question	Answer
134	Attachment 2 (Statement of Work); RFP — Since the SOW says training costs are vendor-borne, how would you like bidders to allocate initial training, refresher training, ad hoc guidance-change training, and new-project training between stand-up and ongoing fixed fees?	USAC expects Offerors to include only stand-up activities in the stand-up pricing. Training costs after the cutover date should be included in the ongoing pricing.
135	RFP; Attachment 2 (Statement of Work) — When can Variable Fee billing begin, and what unit of measure does USAC want priced transactionally—contacts, minutes, channels, cases, or something else?	Variable Fee billing begins December 1, 2026 and should be priced on a case basis.
136	RFP; Attachment 2 (Statement of Work); Attachment 9 (Transition Milestones) — For bidders proposing both scopes, would you like CRM transition pricing and post-cutover CRM O&M pricing shown separately?	Yes, Offerors should price the CRM transition and going costs separately as outlined in Attachment 1 (Bid Sheet).
137	Attachment 2 (Statement of Work); Attachment 9 (Transition Milestones) — How should deferred non-critical requirements after cutover be priced and invoiced: stand-up, ongoing fixed fee, or a separately identified change-control item?	Milestone payments should be broken out as indicated on Attachment 1 (Bid Sheet).
138	RFP — Can you confirm that any cost omitted from Attachment 1 will be treated as included at no additional cost, even if the requirement appears elsewhere in the RFP or SOW?	Offeror is expected to calculate all expected costs and incorporate them into Attachment 1 (Bid Sheet) at the time of proposal submission.
139	RFP; Attachment 2 (Statement of Work) — Can you confirm whether USAC may make separate awards for CSC and CRM O&M, or whether USAC expects one integrated award?	RFP Page 7 states USAC may award separate contracts for the Customer Service Center Services and CRM O&M Services.

Q#	Question	Answer
140	Attachment 2 (Statement of Work); Attachment 9 (Transition Milestones); RFP — Can you clarify whether any program can cut over before 12/1/2026, or whether 12/1/2026 is the earliest and required ready-for-cutover date?	12/1/2026 is the latest possible cutover date. USAC may consider an earlier cutover if the stand-up of operations is completed earlier.
141	Attachment 2 (Statement of Work); Attachment 9 (Transition Milestones) — Could you provide the acceptance criteria for each Attachment 9 milestone, especially Vendor-determined Milestone #1, Training, Testing, Ready for Cutover, Trial Period, and deferred non-critical requirements?	Acceptance criteria may be proposed by the Vendor and agreed upon by USAC.
142	RFP; Attachment 9 (Transition Milestones); Attachment 1 (Bid Sheet) — Would you like milestone payments and stand-up pricing broken out by E-Rate, High Cost, Rural Health Care, Financial Operations, and CRM O&M, or bundled together?	Milestone payments should be broken out as indicated on Attachment 1 (Bid Sheet).
143	Attachment 2 (Statement of Work); Attachment 9 (Transition Milestones) — What does USAC consider sufficient testing for milestone acceptance—for example, telephony, IVR, workflow, reporting, security, business/UAT, and data validation?	Acceptance criteria may be proposed by the Vendor and agreed upon by USAC.
144	RFP; Attachment 2 (Statement of Work); Attachment 9 (Transition Milestones) — Can you confirm whether the 30-day trial period is subject to the same SLA and service-level-credit framework as steady-state operations?	Missed SLAs may be waived during the first 90-days of the base period at USAC's discretion.

Q#	Question	Answer
145	Attachment 2 (Statement of Work); Attachment 9 (Transition Milestones) — Can you clarify whether external training materials and website/communication materials must all be complete before cutover, or whether some of those items can be deferred as non-critical?	Yes, all items must be complete prior to the cutover.
146	RFP; Attachment 2 (Statement of Work) — Can you clarify the scope split between CSC operations and CRM O&M? The CSC scope focuses on Contributors, E-Rate, High Cost, Rural Health Care, and Service Providers, while the CRM section references E-Rate, Lifeline, Rural Health Care, High Cost, Finance, Complaints, and Whistleblower programs. Which programs and user groups are in base scope at award for each component?	The Customer Service Center operations in this RFP are for E-Rate, High Cost, Rural Health Care, and FinOps (Contributors and Service Providers). The CRM O&M in this RFP are for each group at USAC that utilizes the CRM, which includes E-Rate, High Cost, Lifeline, Rural Health Care, FinOps (Contributors and Service Providers), and Whistleblower.
147	RFP; Attachment 2 (Statement of Work) — How would you like bidders to price business-hour extensions, filing-window surges, weekend or midnight coverage, and other seasonal spikes in demand?	USAC expects Offerors to include all scenarios in the proposed pricing.
148	Attachment 2 (Statement of Work) — Can you confirm the minimum Spanish-language staffing expectation, and whether any additional language support would be handled through change control?	USAC only requires English and Spanish agents be available. Typically, USAC receives only a small number of Spanish calls/emails per year. One bi-lingual agent/supervisor should suffice, and if none are available, a callback within 1-business day is needed.
149	Attachment 2 (Statement of Work) — Can you reconcile the retention requirements for calls and transcripts versus emails and other correspondence, and confirm what retention and storage obligations bidders should include in pricing?	Phone call recording must be kept for six (6) months. All other data is kept for ten (10) years. Dynamics CRM storage is covered by USAC. Storage of call recordings and transcripts should be included in any pricing.

Q#	Question	Answer
150	RFP — Can you clarify how ad hoc CSC support is initiated, approved, volume-limited, and priced compared with standard day-to-day operations?	Typically, ad hoc CSC requests are related to outbound call requests from the programs to provide information to or collect information from certain stakeholders. This is initiated and approved by USAC and is priced on an hourly basis.
151	RFP; Attachment 2 (Statement of Work) — Can you clarify the architecture boundary between vendor-supplied CSC technologies and the USAC Microsoft Dynamics CRM environment, including what must be integrated at cutover and what must remain USAC-hosted or USAC-controlled?	USAC currently uses Amazon Connect for call management, and CSC technologies are expected to be fully integrated at Day 1 cutover. USAC retains administrative control of M365 and Azure, while the vendor will be responsible for Dynamics 365.
152	RFP; Attachment 2 (Statement of Work) — Can you confirm whether non-FedRAMP CSC or customer-data technologies must already be FISMA-accredited and ATO-ready by cutover, or whether USAC would accept an approved remediation path during transition?	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 FedRAMP environment must be FISMA accredited prior to contract award.
153	RFP; Attachment 2 (Statement of Work) — Can you clarify the minimum compliance and documentation package bidders should include in base pricing, including the privacy plan, network diagram, FISMA/NIST support, Section 508 compliance, security/privacy training, annual FISMA audit support, logging/monitoring, DR/COOP documentation, and required updates and testing evidence?	All applicable standards are outlined in the RFP and its associated attachments.
154	RFP; Attachment 1 (Bid Sheet) — Can you confirm whether all bidders must submit both AI and non-AI versions of Attachment 1, or only bidders proposing AI-enabled performance?	The proposed use of AI is optional. Offerors are not required to submit a proposal detailing the use of AI if no usage of AI is proposed.

Q#	Question	Answer
155	RFP; Attachment 2 (Statement of Work) — Can you clarify which AI use cases are potentially approvable under this RFP, and where USAC wants AI governance, testing, monitoring, and pricing captured?	Offeror is expected to detail their proposed use of Artificial Intelligence ("AI") within the proposal submission as instructed in RFP Section 7.10.
156	RFP — Can you confirm whether non-material comments or redlines to the Master Services Agreement may be submitted without making a proposal technically unacceptable?	USAC will review changes or additions to the Master Services Agreement that are included in Offeror's proposal. USAC will communicate any unacceptable exceptions to Offeror after review of the exceptions submitted with Offeror's proposal.
157	RFP; Attachment 8 (Confidentiality Agreement) — Can you clarify how bidders should mark proprietary pricing and technical solution details in light of the FOIA/disclosure language and the statement that deliverables become USAC confidential information and USAC property?	Offeror's proposal submission is not considered a deliverable as deliverables are only submitted during performance of a fully executed contract.
158	The RFP states USAC may award separate contracts for CSC and CRM O&M services. Will offerors who bid on both components be evaluated more favorably than those bidding on only one? Or will each component be evaluated entirely independently on its own merits? RFP Reference: Page 7, Section 2.2 (Contract Type)	Each component will be evaluated independently and award will be made to the proposal(s) providing the best value to USAC.
159	Is there a current incumbent vendor performing any of the CSC or CRM O&M services described in this RFP? If so, will the incumbent be required to participate in knowledge transfer activities, and is that obligation captured in an existing contract? RFP Reference: Page 4, Section 1.2 (Objective)	Yes, the current Vendor will assist in the transition to a new Vendor.

Q#	Question	Answer
160	Section 1.4(A) states that telework is not authorized and all vendor personnel must work from vendor or approved subcontractor offices. Does this apply to all customer service agents handling calls and tickets, or only to Key Personnel and supervisory roles? If it applies to all agents, is a dedicated single facility required, or may agents be distributed across multiple vendor office locations within the U.S.? RFP Reference: Page 5, Section 1.4(A) - (Place of Performance)	Key Personnel and Agents can work from any number of facilities based within the U.S. Any exceptions for telework must be submitted to USAC in writing and agreed upon by USAC prior to implementation.
161	Are there minimum or maximum geographic concentration requirements for the vendor's delivery facility/facilities (e.g., proximity to USAC's Washington, D.C. headquarters)? RFP Reference: Page 5, Section 1.4(A) and Page 18, Section 7 subsection 10 Paragraph B (5)(m)	Key Personnel and Agents can work from any number of facilities based within the U.S. Any exceptions for telework must be submitted to USAC in writing and agreed upon by USAC prior to implementation.
162	The RFP requests both an FFP option and a per-unit/variable pricing option for the CSC. Does USAC have a preference between the two structures, or are both equally viable paths to award? RFP Reference: Page 7, Section 2.2 (Contract Type) and Page 8, Section 2.4 (Contract Pricing)	USAC will evaluate the pricing models proposed and select the pricing structure that provides the best value to USAC.

Q#	Question	Answer
163	What is the current FISMA authorization level (Low, Moderate, or High) for the MS Dynamics 365 CRM environment, and does an existing Authority to Operate (ATO) exist that the vendor will inherit, or will the vendor be responsible for obtaining or maintaining an ATO? RFP Reference: Page 5, Section 1.3 (Company Profile), Page 9, Section 3.1 (Scope of Services 2nd bullet)	USAC's existing ATO will be leveraged. The environment operates within Azure Government, which is authorized at the FedRAMP High level.
164	What is the current extent of customization of the MS Dynamics 365 instance (e.g., number of custom entities, workflows, integrations with third-party systems)? Will full technical documentation of the existing CRM configuration be made available so offerors could plan accordingly? RFP Reference: Page 4, Section 1.2 (Objective)	The CRM was implemented over four (4) years ago. Typically, we have a minor deployment monthly and a major deployment quarterly that may include customization. USAC will share documentation with the Vendor.
165	The RFP prohibits vendors from proposing a proprietary hosting environment or tenant on a proprietary SaaS CRM system. Can USAC confirm the current hosting environment for the MS Dynamics 365 instance and clarify what hosting constraints or requirements the vendor must adhere to when taking over O&M responsibilities? RFP Reference: Page 10, Section 3.1 (Scope of Services - fourth bullet)	The Dynamics 365 environment is hosted in Azure Government, which is FedRAMP High authorized. Vendors must operate within this environment and adhere to all associated hosting and security requirements.

Q#	Question	Answer
166	Technical prompt 5(e) in Section 7.10(B) asks offerors to describe experience with FISMA and federal agency requirements but does not include a word limit, unlike all other technical prompts in that section. Is there an intended word limit for this response? RFP Reference: Page 17, Section 7 Subsection 10 paragraph B (5)(e)	This prompt does not have a word limit.
167	The RFP states the vendor must present itself to customers as USAC, not as a third-party contractor. Can USAC clarify the full extent of this branding requirement and which customer-facing channels and communications it applies to? RFP Reference: Page 9, Section 2.5 (Service Level Credits - last sentence before milestone credits)	Typically, this covers emails from agents being from USAC.org and phone conversations referencing USAC.
168	Past Performance Volume III requires three examples of similar BPO support services within the past five years. Will USAC accept commercial sector BPO experience as relevant past performance in the absence of direct federal government clients, provided the scale, complexity, and nature of services are comparable to what is described in this RFP? If so, what weight, if any, will commercial experience carry relative to government-specific experience during evaluation? RFP Reference: Page 19, Section 7 Subsection 10 (C) (Past Performance Information)	Yes, all past performance is acceptable.

Q#	Question	Answer
169	Section 3.1 states that any CSC and data storage technologies not hosted in a FedRAMP-authorized environment must be FISMA accredited to meet NIST 800-53 Revision 5 requirements. Will USAC consider vendors who propose to use exclusively FedRAMP-authorized platforms (e.g., cloud-based contact center solutions already on the FedRAMP marketplace) without the vendor itself holding a FISMA accreditation, given that the underlying infrastructure would already meet the security requirements? RFP Reference: Page 9, Section 3.1 (Scope of Services - second bullet	Yes
170	To support offerors in developing an optimal solution, can USAC provide additional detail on 2023–2025 CSC call and case volumes across all channels (email, web-based, inbound, and outbound)? Specifically, please provide: average handle time by contact type/channel; call types or topics and their associated complexity levels (including volume by type and average handle time by type); and any notable contact patterns by month, week, or time of day.	Average call handle time has been added to Attachment 4 – Case Volumes & Critical SLA Metrics. Only E-Rate currently offers a web-based channel via EPC. USAC initiated outbound customer service is generally limited to small ad hoc projects. Inquiries are generally related to program rule questions, application/form submission assistance, application/invoice/form/disbursement status, login/permissions/system/tool issues, and payments.

Q#	Question	Answer
171	Can USAC provide further detail on the customers for the four business lines serviced by the CSC and the common questions/issues?	Generally, USAC works with telecommunications, internet, and related service providers across the four programs, along with rural health care providers, schools, libraries, and consultants representing these entities. For the Lifeline Program, USAC also receives inquiries from low-income households and representatives assisting low-income household. The Lifeline customer service center is not being bid on at this time; however, Lifeline emails are handled within the Dynamics CRM.
172	Can USAC provide information on the skills required by CSC agents and current quantity of CSC agents today?	USAC does not set this number, but the Vendor should be able to meet all SLAs under their staffing levels. Current level: • 5 supervisors • 15 agents fully dedicated
173	Can USAC confirm whether any of the business lines serviced by CSC require multilingual support?	USAC only requires English and Spanish agents be available. Typically, USAC receives only a small number of Spanish calls/emails per year. One bi-lingual agent/supervisor should suffice, and if none are available, a callback within 1-business day is needed.
174	Given the estimated Q&A release date of 3/30, will USAC consider a 2-week extension to the RFP response deadline to allow Offerors to incorporate Q&A information into their bids?	No, the deadline for proposal submission will not be extended.
175	Can the government confirm that Average Time to First Response is referring to email and EPC case inquiries?	Yes, the average time to first response specifically refers to email and EPC inquiries.
176	Can USAC clarify the number of expected integrations as described in 3.3.5 and 4.1.E?	USAC requires integration with the Dynamics CRM. Agents will have access to other systems and tools as needed, but direct integration with those tools is not required at this time.

Q#	Question	Answer
177	Can the government confirm whether a brick-and-mortar contact center is required for performance under this solicitation, or if a hybrid or fully remote contact center operating model is allowable? Given the significantly higher facility, staffing, and overhead costs associated with establishing and maintaining a brick-and-mortar site, clarification on acceptable operating models will help ensure more accurate pricing and solution design	The Customer Service Center must be operated from a dedicated physical location. Please note USAC is a not-for-profit Delaware corporation operating under the oversight of the FCC.
178	Please confirm the offeror may propose their own bid sheet if they were to propose a 3rd creative price option.	Yes, Offeror may submit a separate bid sheet if proposing a creative pricing option.
179	Can USAC clarify whether the Microsoft Dynamics CRM solution is fully deployed and operational today or whether the vendor will be required to deploy the solution?	The Microsoft Dynamics CRM is fully deployed and operational.
180	The requirements mentions routine patching and software updates for operations and maintenance of the Microsoft Dynamics CRM system. It is also stated that USAC is utilizing Microsoft's cloud-hosted Dynamics solution. Is there other software deployed, on-premises or in the cloud, that would require O&M support or just the cloud-hosted Dynamics service?	Amazon Connect is also in use and may require related operational support.
181	To support offerors in estimating level of effort and price for CRM O&M, can USAC provide estimated volumes of the O&M tasks to be performed (e.g., ticket count and complexity, number of requirements, list of backlog requirements, average patch volume, release cadence, etc.)?	Ticket volume can differ month-to-month. USAC typically performs one small deployment per month and one major deployment per quarter.

Q#	Question	Answer
182	Can USAC provide information on the incumbent contract to include the current vendor and contract award value for CRM and CSC scope areas?	USAC does not provide details regarding current contracts.
183	The solicitation does not specify the proposal volume or submission location for Attachment 3. Can USAC please clarify how it intends Offerors to submit Attachment 3 as part of the proposal package (e.g., within a volume, or as a separate attachment)?	Yes, Offeror must complete Attachment 3 and include the Excel worksheet as a separate attachment to their proposal response.
184	Can USAC please clarify its expectations for how Offerors bidding Customer Service Center (CSC) services only should address proposal sections and prompts that are specific to CRM Operations & Maintenance?	Offeror's proposal should specify if Offeror only intends to bid on the CSC and USAC will consider sections relating to CRM O&M as not applicable.
185	Can USAC please clarify the average handle time (AHT) by channel including whether AHT varies by program area?	Average Call Handle Time is provided in Attachment 4 (Case Volumes & Critical SLA Metrics - Revision 1).
186	Can USAC please clarify how a "case" is defined for purposes of volume reporting and staffing assumptions, including how cases may be initiated, updated, or resolved across different intake channels (e.g., phone, email, EPC)?	A case is any inquiry received via the CRM or EPC via email, phone, or online submission and all related communications required to resolve that inquiry.

Q#	Question	Answer
187	The SOW references a tiered support model (Tier 0, Tier I, and Tier II) and notes that a subset of Customer Service Center agents may be cross-trained to support multiple USF programs. Can USAC clarify how work and case complexity are intended to be distributed across Tier 0, Tier I, and Tier II, and how cross-trained agents are expected to be utilized across programs within the CSC operating model, particularly for purposes of staffing and pricing assumptions?	USAC leaves decisions of distributing work and staffing up to the Vendor.
188	What is the current number of Agents supporting each Call Center program (E Rate, High Cost, Rural Health Care, and Financial Operations)?	Based on the call, email, and web inquiry volume provided, USAC requests Offerors to provide estimates on the best number of agents to ensure proper coverage, quality responses, and low wait times.
189	The SOW states that hours can be extended at different points in the year. For Option 1 (FFP), are these extended hours (evenings, weekends, peak filing windows) to be included in the pricing, or will they be treated as a Surge?	Yes, USAC expects Offerors to include all scenarios in the proposed pricing.
190	The RFP and Master Services Agreement state that USAC is not a federal agency and that the contract is governed by the Master Services Agreement rather than the Federal Acquisition Regulation (FAR). Can USAC confirm its expectations regarding the applicability of any FAR-based requirements or labor standards, including how Service Contract Labor Standards (SCA), if applicable, should be considered by Offerors for proposal and pricing purposes?	All applicable standards are outlined in the RFP and its associated attachments.

Q#	Question	Answer
191	To support accurate workforce modeling and pricing, can USAC please provide historical average contact arrival patterns by day of week and 30-minute intervals for each in-scope channel (e.g., phone, email, web, IVR), preferably broken out by Program (E-Rate, High Cost, RHC, Financial Operations)? If available, please indicate whether these patterns reflect normal operating periods versus known peak seasons (e.g., filing windows).	This level of break-out is not available.
192	Please provide guidance on the expected duration of initial agent training and identify whether any Programs generate seasonal or infrequent inquiry types that require specialized or periodic training beyond standard onboarding?	All training would need to be completed during the transition period prior to cutover. Initial agent training is not expected to take more than 2-4 weeks but will be left to the discretion of the Vendor to ensure they meet all SLAs.
193	Please clarify if offerors can add an additional cover page and table of contents to each volume that does not count against the page counts.	Cover pages or table of contents are considered optional and will be counted against page counts of each volume.
194	Please provide historical actual AHT data per call type for phone, cases, and e-mail for the last 12 to 24 months.	Average Call Handle Time is provided in Attachment 4 (Case Volumes & Critical SLA Metrics - Revision 1).
195	What is the expected ramp-up time per program for an agent to be considered "production ready"?	All training would need to be completed during the transition period prior to cutover. Initial agent training is not expected to take more than 2-4 weeks but will be left to the discretion of the Vendor to ensure they meet all SLAs.
196	Will there be a grace period for agent related SLAs?	Missed SLAs may be waived during the first 90-days of the base period at USAC's discretion.
197	Does USAC consider surges > 20% above forecast as "significant" , or should vendors propose thresholds?	USAC does not set thresholds for surges.

Q#	Question	Answer
198	What typical scope or triggers have resulted in ad hoc CSC requests in the past?	Typically, ad hoc CSC requests are related to outbound call requests from the programs to provide information to or collect information from certain stakeholders.
199	What is the expected training and nesting duration?	All training would need to be completed during the transition period prior to cutover. Initial agent training is not expected to take more than 2-4 weeks but will be left to the discretion of the Vendor to ensure they meet all SLAs.
200	Can you provide the minimum workstation specifications required for agents and support staff?	USAC expects Offerors to propose operational models that they consider optimal.
201	What challenges do agents face during peak cycles across programs?	- Late filers (wait until the last two weeks of a deadline) may encounter unexpected system issues that may take USAC's IT department a few days to troubleshoot and resolve. This can cause a late filer to miss a deadline and contact the CSC multiple times with frustration and status requests. - USAC or the FCC may make system changes or policy announcements during a peak cycle that impacts stakeholders filing forms. Agents need to stay informed and aware of these changes daily.

Q#	Question	Answer
202	Are there recurring workflow bottlenecks across the call participant journeys?	• System issues are submitted via ticket to USAC's IT department to troubleshoot and resolve. USAC does not have ETAs for a ticket resolution. This results in an agent not being able to give a stakeholder ETAs for resolution and may cause the stakeholder to contact the CSC multiple times for a status. • For E-Rate, the EPC system is user-facing and shows a case number that stakeholders can refer to when calling the CSC. This helps prevent/merge duplicates and for the agents to know the history of an issue. For other programs, the CRM is not user-facing and stakeholders may not know their case number. This may cause duplicate cases and limit the agent's ability to know the history of an issue upfront. • Agents are not authorized to transfer live calls to internal USAC staff. Agents will create the case and escalate to staff for the staff to conduct a call back when possible.
203	Please confirm that vendors are to price Option 1 as FFP, and Option 2 Per Interaction T&M based on 2024/2025 inquiry volumes that were provided?	USAC expects volumes to remain consistent in 2026, and the Vendor may use their discretion to price option 1 and option 2.
204	RFP 3.1 Responsibilities and Requirements of Vendor: 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.": Please confirm that Lifeline is out of scope for CSC and should be replaced by Rural Health Care.	Yes, please consider Rural Health Care for ad hoc support as well.

Q#	Question	Answer
205	RFP 3.1. Responsibilities and Requirements of Vendor Ad Hoc CSC Support : Please provide specific examples of past in-scope Ad Hoc support and include an estimated number of annual hours needed for these activities	Typically, ad hoc CSC requests are related to outbound call requests from the programs to provide information to or collect information from certain stakeholders. This is initiated and approved by USAC and is priced on an hourly basis. In 2025, this was less than 20 hours of work.
206	SOW 3. Requirements Additionally, in support of customer needs, Vendor will be required in many case to access data/reports already in or provide input into USAC systems, including, but not necessarily limited to: • E-Rate Productivity Center ("EPC"): the account and application management portal for the E-Rate Program. Applicants, consultants, and service providers participating in the E-Rate Program use this tool to manage program processes and to submit questions : Please elaborate on ""provide input into USAC systems"". What type of EPC inputs or updates are in scope for Vendor, what is the frequency, and level of effort? For example, if entities are being created or updated, how many were completed in 2025, and what is the estimated hours associated with these activities annually?	In 2025, the CSC created 2,631 entities (applicant + consultant). Each entity creation is estimated to take less than 30 minutes of active work. Post case work in EPC is necessary at times but is not required for all EPC cases and does not create a measurable increase in average handle time.
207	SOW 3.3.10 Stakeholder Data. Entering stakeholder data into the USAC systems and databases (as applicable).: Is the Vendor responsible for account administrator updates in EPC? If so, how many updates were needed in 2025 and what is the estimated vendor hours dedicated to this activity annually?	No, EPC is administered by USAC.

Q#	Question	Answer
208	RFP 3.1 Responsibilities and Requirements of Vendor: Ad Hoc CSC Support : Is vendor responsible for reviewing any shared mailboxes tracked outside of the CRM? If yes, is that volume included in the Attachment 4 - Case Volumes?	No, all emails will be handled via the CRM. There are currently two E-Rate related email boxes that are monitored by the Vendor which we plan to move into the CRM in 2026.
209	Attachment 5 - SLA: "Average Time to First Response (Email)" <24 hours": Clarify if this average includes emails received on Saturdays, Sundays, and Holidays.	This calculation is based on 24-hour clock and does not remove weekends and holidays for the average calculations. In general, most emails are responded to on the same day they are received.
210	SOW page 30 Quality Assurance Plan and SOW page 13 QASP: Is there an expectation for a recurring vendor contact center agent QA deliverable in addition to the Quality Assurance Plan on SOW page 30 and QASP listed on SOW page 13?	The Vendor should provide agent-level Quality Assurance scores on a monthly basis.
211	RFP 5.2 Weekly Status Meeting and SOW 3.1.12 Calibration calls: After implementation, are there any recurring meetings with Shared Services, the individual programs, or Financial Operations teams outside of the "Weekly Status meeting" listed in RFP 5.2 and Calibration Calls in SOW 3.1.12. If so, please provide the duration and frequency.	On the days leading up to a filing window deadline, USAC requests additional 15–30 minute check-in meetings, typically 3x a day, to discuss trends, urgent issues, and inquiry volume related to the deadline.
212	SOW 3.1.12 Calibration Calls: Are calibration calls held separately for each program and Financial Operations, or is this consolidated into a single call?	Calibration calls are conducted separately for each program.
213	Attachment 4 - Case Volumes: For phone call volume that requires email contacts, are those emails included in the email volume totals? If not, in 2025, what percentage of calls per program have email contacts and what is the average number of email contacts within one phone call record?	At this time, case volumes are calculated based on the original source of the inquiry.

Q#	Question	Answer
214	Attachment 4 - Case Volumes: For phone call volume that requires the agent to make EPC or other system updates, in 2025, on average how much after call time is needed outside of standard call documentation?	Post case work in EPC is necessary at times but is not required for all EPC cases and does not create a measurable increase in average handle time.
215	Attachment 4 - Case Volumes: What percentage of calls in 2025 have after call time outside of standard call documentation?	USAC does not currently have the ability to track this figure.
216	Attachment 4 - Case Volumes: For email and EPC case volume, are multiple contacts per case represented as unique cases, or are email cases with multiple contacts represented as 1 email/EPC case? If represented as one case, what is the average number of emails within one email record in 2025?	EPC cases and emails cases are counted as one case regardless of the number of contacts made.
217	Attachment 4 - Case Volumes: Does email volume include emails that do not require a response, like spam emails? If not, in 2025, what was the volume and are those deleted/excluded by the vendor or are those emails removed systematically?	Email volumes do not include the number of emails that were excluded as spam, junk, or duplicate emails. • Certain emails are excluded automatically based on our CRM exclusion rules. These types of emails never reach the agents as a case. • Other emails need to be removed manually by the agents. In 2025, there were approximately 1,500 emails that created cases that needed to be manually deleted/excluded by the vendor in the CRM.
218	SOW 3.4.7.1 Continuous Training: Are there regular or significant updates to E-Rate, Rural Health Care, High Cost, and Financial Operations, such as system transitions, changes in program rules, or modernization efforts that would require stakeholders to need additional education and guidance? If so, what is the frequency?	Yes, training typically coincides with new orders and releases from the FCC and system updates and modernization. There is no specific frequency for these orders, releases, and system updates.

Q#	Question	Answer
219	SOW 3.3.8 Knowledge Base: How many knowledge articles are currently accessed by contact center staff for each program and Financial Operations? How often are knowledge articles updated by the vendor?	The current knowledgebase contains 1,358 articles and is updated regularly by USAC and the Vendor.
220	SOW 3. Requirements of the Customer Service Center Stand Up and Operation - At least a subset of agents shall be cross-trained by Vendor to support multiple	Please see response to Question #221 below.
221	USF programs and Financial Operations, considering the technical complexity of USF programs and skill level of agents. : Given the technical complexity for each individual program, what percentage of agents are typically cross trained to cover calls from all three programs and Financial Operations? For those agents who are cross trained for more than two programs, how many months or years of experience are typically needed to become technically proficient to support additional programs?	USAC works with a cross-training model for which most agents and supervisors are trained across multiple programs. The figure below cover the total number of agents/supervisors trained per program: • E-Rate = 13 agents / 3 supervisors • FinOps = 7 agents / 2 supervisors • High Cost = 7 agents / 2 supervisors • Rural Health Care = 7 agents / 2 supervisors 12 agents and 4 supervisors are cross-trained for more than one program.
222	SOW 3. Requirements of the Customer Service Center Stand Up and Operation - At least a subset of agents shall be cross-trained by Vendor to support multiple USF programs and Financial Operations, considering the technical complexity of USF programs and skill level of agents. : Given the technical complexity for each individual program, is there currently a supervisor and/or SME for each program?	Please see response to Question #221.
223	RFP 7. Artificial Intelligence : What is the approval process and lead time for AI usage and what is prohibited?	Details regarding the use of AI will be shared with the awardee during contract award.

Q#	Question	Answer
224	RFP 7. Artificial Intelligence: Does AI include common tooling such as summarization of emails within the CRM?	Offeror is expected to detail their proposed use of Artificial Intelligence ("AI") within the proposal submission.
225	RFP B Technical (Volume II) : Is USAC expecting RPA as part of base scope, or only optional/roadmap?	USAC does not currently use AI and any RPA would need to be reviewed and approved by USAC prior to implementation. The vendor should use their discretion and expertise in this area to guide the future roadmap.
226	The RFP requires Bidders to respond using 12-point font. May Bidders use a smaller, still readable font for each of the following: a) headers and footers b) requirement text c) exhibits/figures/graphics d) tables	Yes
227	The RFP requires Bidders to respond using 12-point font. May Bidders use a larger font for headings and display text?	Yes
228	Do headings needs to be single-spaced for specific page count-limited sections?	USAC leaves this up to the discretion of the Offeror.
229	Is the Dynamics 365 environment hosted on Microsoft cloud (Azure), on-premise, or hybrid?	The environment is hosted in Microsoft Azure.
230	What is the current version/release of Dynamics 365 deployed in production?	Server version: 9.2.26022.00170 Client version: 1.4.11604-2602.2
231	How is Dynamics 365 integrated with the telephony/CCaaS platform today?	Integration is performed through an Azure service account using the Dynamics 365 API.

Q#	Question	Answer
232	Is the Omnichannel voice channel or a third-party CTI connector in use?	Amazon Connect is used. Integration is performed through an Azure service account using the Dynamics 365 API.
233	What backend USAC or external systems does Dynamics 365 integrate with (e.g. USAC program databases, identity/auth systems, document management)?	The Dynamics CRM is not integrated with other USAC systems at this time.
234	Are there custom entities, workflows, Power Automate flows, or plugins that have been developed on top of the standard Dynamics configuration?	Yes, the environment includes custom entities, workflows, and Power Automate flows.
235	Is there a Dynamics 365 roadmap or backlog of enhancement requests that the incoming contractor would be expected to execute?	Yes. There are approximately 33 open backlog items of varying size and complexity.
236	Are there any known technology refresh cycles, end-of-life systems, or planned platform migrations?	No planned refresh cycles or migrations at this time.
237	What integrations exist between the telephony platform and backend USAC program systems?	Amazon Connect is integrated through an Azure service account using the Dynamics 365 API.
238	What knowledge management or agent desktop tools are in use?	TDB
239	What CCaaS or telephony platform is currently in use (e.g. Genesys, NICE CXone, Avaya)?	Amazon Connect, integrated through an Azure service account using the Dynamics 365 API.
240	What documentation exists today (e.g., SOPs, runbooks, call scripts, escalation paths, training materials)?	All of these items exist in the knowledgebase.
241	Are bidders required to submit the Attachment 3 Vendor Capability Checklist with their proposal or upon award? If so, where should bidders include the attachment?	Yes, Offeror must complete Attachment 3 and include the Excel worksheet as a separate attachment to their proposal response.

Q#	Question	Answer
242	Are bidders required to submit the Attachment 5 SLAS with their proposal or upon award? If so, where should bidders include the attachment?	Yes, Offeror must submit their proposed SLAs on Attachment 5 and include the Excel worksheet as a separate attachment to their proposal response.
243	Can you please provide the IVR call volumes for 2023, 2024, and 2025?	Please see Calls Offered in Attachment 4.
244	Please define the difference between an E-rate call and an EPC case?	An E-Rate call is an E-Rate inquiry that originates via a phone call, and an EPC case is an E-Rate inquiry that originates as a web-based submission from the customer in EPC.
245	How long does it typically take to complete an EPC case volume inquiry?	This action takes less than 1 minute.
246	For 2024 and 2025, what was the average time a caller stays in the IVR by program type?	In 2025, all Customer Service Center IVR Average Speeds to Answer were below 30 seconds.
247	Are bidders required to submit a Work Plan with their proposal or upon award? If so, where should bidders include the attachment?	A work plan would be developed and approved upon award.
248	What percentage of calls per vertical (eg. RHC, HC, E-rate) are Tier 0, Tier 1, and Tier 2?	Approximately 19% of all cases are escalated to USAC. All other cases are handled by CSC agents and supervisors.
249	The RFP references USAC's requirement for prior written approval before delegating work to subcontractors. If subcontractors are identified in the proposal, will they be considered pre-approved upon award, or will separate post-award approval still be required prior to commencement of work?	Approved subcontractors will be written into the Master Services Agreement prior to contract execution. Offeror will be notified prior to intent to award if a subcontractor is not approved.

Q#	Question	Answer
250	Should each of the three required project examples demonstrate both Customer Service Center (CSC) and CRM Operations & Maintenance (O&M) capabilities within the same engagement, or may offerors submit a combination of projects that separately demonstrate CSC and CRM O&M experience?	A combination is acceptable.
251	What version(s) of Microsoft Dynamics 365 are currently deployed, and is the environment cloud-based, hybrid, or on-premises?	Server version: 9.2.26022.00170 Client version: 1.4.11604-2602.2 The environment is cloud-based.
252	What existing CSC and CRM system documentation (architecture diagrams, data models, runbooks, integration specs) will be provided, and are there known gaps?	Documentation required for NIST 80053, ATO, and FISMA compliance is available. Additional documentation may be provided as needed.
253	To what extent has Dynamics been customized (custom entities, plugins, workflows, Power Automate, scripts), and are there modules that may impact maintainability or upgrades?	The system includes custom entities, workflows, and Power Automate flows. These customizations have minimal to no impact on maintainability or upgradeability.
254	Please provide a list of third-party tools and applications integrated with Dynamics, including any licensing or vendor dependencies.	OKTA is used for authentication, and CITRIX is used to support non-desktop access.
255	What systems are integrated with Dynamics and what methods are used (APIs, middleware, batch processes)?	Splunk is used for log monitoring, and CyberArk is being evaluated for credential management.
256	How many environments exist and what release management and CI/CD processes are currently in place?	Approximately 5–6 environments exist, including 1 production and standard lower tiers (development, testing, etc.). Basic configuration management is performed using Azure DevOps, and Bamboo has also been evaluated for CI/CD.
257	Are there known performance issues, backlog items, or technical debt areas that the contractor should address?	N/A

Q#	Question	Answer
258	What security model and compliance requirements apply to the Dynamics environment?	Dynamics is a FedRAMP certified environment and is required to go through the ATO process annually.
259	Will the incumbent provide knowledge transfer, and are there planned upgrades or migrations during the period of performance?	Yes, the current Vendor will assist in the transition to a new Vendor.
260	The RFP references USAC's requirement for prior written approval before delegating work to subcontractors. If subcontractors are identified in the proposal, will they be considered pre-approved upon award, or will separate post-award approval still be required prior to commencement of work?	Approved subcontractors will be written into the Master Services Agreement prior to contract execution. Offeror will be notified prior to intent to award if a subcontractor is not approved.
261	The SOW says vendors may bid on "one or both components," but the uploaded documents do not say whether USAC may make separate awards for CSC and CRM O&M.	RFP Page 7 states USAC may award separate contracts for the Customer Service Center Services and CRM O&M Services.
262	Section 3.2.5 says some requirements may be deferred shortly after cutover. Which specific requirements are candidates for deferral, and what is the acceptance standard for Milestone #6?	This can be negotiated and approved with USAC.
263	Please clarify what incumbent cooperation, shadowing access, documentation, and overlap support will be provided during nesting / parallel services.	Yes, the current Vendor will assist in the transition to a new Vendor.
264	Attachment 5 says USAC expects at least a 5% credit if critical SLAs are not met. Is that 5% assessed per missed critical SLA, per month in aggregate, or by another formula?	As stated in the RFP, Offeror is asked to propose the exact calculation for each service level credit.

Q#	Question	Answer
265	The bid sheet includes an assumptions tab. Please confirm whether offerors may condition pricing on assumptions tied to missing incumbent transition data, or security architecture information.	Offerors are expected to provide all assumptions that were utilized in order to determine the proposed pricing submitted in Attachment 1 (Bid Sheet).
266	How should the Stand-up Fee be allocated across individual milestones in Attachment 9 and Attachment 1? The SOW says "Payment will be made upon acceptance of each milestone," and the performance section says the "Stand-up Fee for such Milestone specified in Attachment 1 (Bid Sheet)" will be reduced if a milestone is late.	Offeror must determine how the Stand-up Fee is allocated across individual milestones and submit with Offeror's proposal.
267	What are the exact pricing units for the CSC recurring and variable fees by channel? The SOW requires invoice support showing "number of contacts and total minutes with stakeholders, broken out by channel," and it also says the vendor is not entitled to "Monthly Recurring Fee or Variable Fees" during pre-cutover. But the uploaded documents do not clearly define whether pricing for email/web/application-internal requests is per contact, per case, per minute, per hour, or bundled into the recurring fee.	Please provide variable pricing based on cases.
268	Are all transition-period labor and shadowing costs expected to be fully embedded in the Stand-up Fee, even if USAC modulates meaningful live volume during nesting? The SOW says the vendor may have to operate in parallel with the incumbent before cutover, that USAC will "modulate the volume of calls," and that compensation for that period is "included in the Stand-up Fee" with no recurring or variable fees.	Yes

Q#	Question	Answer
269	Are all training-development and training-delivery costs required to be included in the Stand-up Fee / ongoing fixed price, with no separate reimbursement under any circumstance? The SOW states "All training costs will be borne by Vendor" and that USAC "will not accept any invoicing for, and will have no obligation to pay, training or associated expenses." Because training deliverables, refreshers, new-project training, and trainer participation are extensive, it would be useful to confirm whether every such cost must be priced in upfront.	Yes
270	The Government has stated that Offerors may choose to bid on only one of the two task areas (Call Center and CRM). If an Offeror bids on both, is it possible that the Government would only award one of the two task areas to a particular Offeror?	Yes, USAC may award the CSC and CRM O&M to two different Vendors. Please note USAC is a not-for-profit Delaware corporation operating under the oversight of the FCC.