

**Mock Task Order Request for Proposal #5:
Project Management Office (PMO)
Professional Services RFP – General Professional Consulting**

CAPITALIZED TERMS USED BUT NOT DEFINED IN THIS TORP HAVE THE MEANING SET FORTH IN PROFESSIONAL SERVICES CONTRACT # USAC-20-015 (THE “CONTRACT”). AND THIS TORP IS ISSUED PURSUANT TO AND UNDER THE TERMS AND CONDITIONS SET FORTH IN THE CONTRACT.

I. TASK ORDER TYPE

USAC intends to award a single task order for the GENERAL PROFESSIONAL CONSULTING service category, under the Contract. The pricing of the Task Order is based on time and materials (T&M).

II. PURPOSE

USAC has a goal of December 31, 2020 to implement a programmatic function in five states, with 20 more states following by December 31, 2021, and the remaining states in place by December 31, 2022. The framework is anticipated to include a blend of automated data sources and manual eligibility reviews. A National Verifier Plan (Plan) is due to the FCC by November 30, 2016 for the implementation effort.

This change is a transformative effort for USAC, and critical to the ongoing success of one of USAC’s programs. The following table summarizes the level of impact that the modernization will introduce to USAC.

Stakeholders	Supporting over 13 million consumers, as compared to our 150,000 USAC-wide stakeholders today
Transaction Volume	Processing millions of applications and re-certifications, as compared to hundreds of thousands of applications and invoices today
Level of Security	Intake of very sensitive personal documents which may often include full SSN or other identifying information
Complex Data Sources	Developing data sharing agreements and processes with 56 states and several federal agencies into a hybrid eligibility checking system
User Expectation of System	24 x 7, real time, and mobile enabled - this system will be the first consumer facing USAC system, and must also work well for carrier, state, and other stakeholders

Given the magnitude of this effort, and the level of change it will bring to the organization, we seek a Contractor to help us envision this transformation, and to translate that vision into an actionable path forward. USAC aims to be iterative, transparent, and collaborative with all the stakeholders involved in this process, including carriers and providers of voice and broadband service, eligible consumers and consumer advocacy groups, state and federal agencies, and other organizations that work with Program beneficiaries. USAC also aims to leverage all necessary expertise to achieve a successful implementation, and expects to include vendors beyond this engagement with targeted expertise that may include information technology systems, systems and cybersecurity, stakeholder engagement, and state and federal eligibility practices. In those cases, this vendor is expected to bring those various insights together with its own into the overall Plan.

III. BACKGROUND

Through its administration of the USF programs on behalf of the FCC, USAC works to promote the availability of quality services at just, reasonable and affordable rates and to increase access to advanced telecommunications services throughout the nation. Specifically, the USF programs provide funding for the expansion of telecommunications and broadband access to rural communities and health care facilities, schools and libraries across the country, and low income households. Through program administration, auditing, and outreach, USAC works with contributors, service providers, and program beneficiaries to achieve the program goals articulated by the FCC for each of these programs.

IV. TASK ORDER PERIOD OF PERFORMANCE

The period of performance for the Task Order is twelve weeks (the “Term”). The Task Order shall expire at the end of the Term unless extended, in writing, by USAC.

V. PLACE OF PERFORMANCE

Contractors shall perform Task Orders at either its own facilities or at USAC Headquarters. Occasional meetings may be conducted at USAC’s Headquarters or at the FCC offices located at 445 12th Street SW, Washington, DC 20554. USAC shall provide appropriate office space and appropriate access to its computer network for duties performed at USAC Headquarters, if necessary. Contractors will be required to complete USAC’s Visitor Form, [USAC Visitor Form](#) and wear a badge while on USAC premises.

VI. TASK ORDER PROCESS

Attachment 1 Pricing. Fixed labor-hour rates for T&M must be fully burdened and include all wages, overhead, general and administrative expenses, taxes and profit, and individual laptop equipment and office software for each category of labor. Services for the T&M CLINS shall be performed on a T&M basis using the labor categories and fixed hourly rates set forth in Attachment

A. ***Task Order Ceiling Price.*** Each Task Order issued under the Contract will include a ceiling price (the “Task Order Ceiling Price”). USAC will not be obligated to pay Contractor any amount in excess of the Task Order Ceiling Price, and Contractor shall not be obligated to continue performance if to do so would exceed the Task Order Ceiling Price, unless and until USAC notifies Contractor in writing that the Task Order Ceiling Price has been increased and specifies in the notice a revised ceiling price that shall apply to the Task Order.

B. ***Steps for each Task Order***

1. **Issuance of Task Orders.** USAC will issue Task Orders in accordance with the procedures set forth below. As specified in each Task Order issued under the Contract, Contractor shall provide experienced personnel who are capable of performing the tasks described in, and who meet the qualifications listed under, the Key Personnel set forth below.
2. **Work Schedule.** Unless otherwise specified in a Task Order, Contractor personnel assigned to a Task Order shall maintain a work schedule consistent with USAC normal business hours and work practices. Contractor personnel are expected to comply with all of USAC’s rules pertaining to conduct in the workplace. Any change in Contractor personnel must be approved, in writing, by the USAC Procurement department and reflected in the Task Order. Contractor personnel are not employees of USAC.
3. **Invoicing and Reporting Instructions.** Each Task Order will outline the invoicing and reporting instructions required specifically for that project.
4. **Task Order Proposals.** Contractor shall perform the following steps which are necessary for the Task Order award. Contractor shall submit one proposal in response to each TORP. See Attachment 1, Mock TORP. Each Contractor proposal in response to a TORP must include the following information:
 - a. ***Basic Information.*** A cover page which includes:
 1. The name of Contractor’s organization;
 2. Offeror’s contact name;
 3. Offeror’s contact information (address, telephone number, email address, website address);
 4. Offeror’s DUNS number;
 5. The date of submission;
 6. A statement verifying the proposal is valid for a period of 120 days; and
 7. The signature of a duly authorized Offeror representative.
 - b. ***Production Schedule.*** A detailed and comprehensive production schedule that includes a proposed schedule and approach for managing and providing the Services and Deliverables required by the TORP. Contractor should also outline any deviations from the TORP.
 - c. ***Pricing.*** A total hourly breakdown of each Contractor proposed staff.

d. *Ceiling Price.* A proposed Task Order ceiling price for the TORP, as well as a justification.

C. *Task Order Proposal Review.* USAC will review Contractor's proposal to this TORP, provide feedback if any adjustments or negotiations are required, and subsequently award the Task Order.

VII. SCOPE OF SERVICES AND DELIVERABLES

The Contractor shall provide professional business consulting and advisory services. The project will be structured into two phases: Phase 1 - Initial assessment (estimated time of completion – 6 weeks), Phase 2 – Approach and planning (estimated time of completion – 12/31/2016, approximately four months after completion of Phase 1). The Contractor may propose a revised timeline for the completion and/or planning of project phases upon prior written approval by USAC. Each phase is described in detail below; however, services and requirements generally include the following high level objectives:

- Document a clear definition of the future of the Program program
- Reinvent the organization to successfully support the future vision
- Provide a structure for change management around the transformation
- Compile known best practices with input from USAC, the FCC, stakeholders, and other USAC vendors into a thorough National Verifier Plan.

This contract will also include an option to add a third phase. Phase 3 – Ongoing Support of Implementation, would have a term of one-year ending on December 31, 2020.

VIII. KEY PERSONNEL & LABOR CATEGORIES

A list, by name, of all Key Personnel, along with the labor category they will fill. For each Key Personnel, Contractor shall provide a biography that includes his/her educational background, skill-set, job and related experience, a list of specific efforts he/she has supported, and references. Contractor shall provide a Relationship Manager (“RM”) who shall ensure the completion and delivery of the Task Order and serve as a single point of contact for the day-to-day management of the Task Order.

All pricing information for the TORP shall be based on Contractor's Attachment 1: Bid Sheet to the Contract.

IX. INVOICES

Where to Submit Invoices. Contractor shall submit invoices through the USAC Coupa Supplier Portal (“CSP”) method or via the Supplier Actionable Notification (“SAN”) method. The CSP method will require Contractor to register and create an account for the CSP. An invitation link

to the CSP may be obtained by emailing CoupaHelp@usac.org. The SAN method will require Contractor to invoice USAC directly from the purchase order (“PO”) sent by USAC via email. For the SAN method, the USAC email will contain a notification with action buttons which will allow Contractor to create an invoice, add a comment, and acknowledge the receipt of the PO. For assistance on all Coupa related billing questions, Contractor may email CoupaHelp@usac.org. For assistance on all non-Coupa related billing questions, Contractor may email accounting@usac.org.

Invoice Submittal Date. Contractor may submit invoices for payment upon completion and USAC’s acceptance of all of the work associated with a Contract or, if the period of performance of a Contract exceeds sixty (60) days, once every thirty (30) days, with the submission of the first invoice no earlier than thirty (30) days after issuance of the Contract.

Content of Periodic Invoices. If periodic invoices are submitted for a Contract, each invoice shall include only Services that have been completed and Deliverables that have been accepted as of the date of invoice submission and that have not been billed in a prior invoice.

X. COMMUNICATION

Contractor shall be reasonably available and accessible via email or telephone during USAC’s normal business hours, which are Monday through Friday (9:00AM-6:00PM ET). When necessary, communication may be made outside of these hours to ensure the progress of the Contract is not impeded.

XI. MEETINGS

During performance of the Task Order, Contractor personnel shall communicate on a regular basis with USAC staff, and, as requested by USAC’s PM, or CA, attend status meetings with USAC staff to discuss project status and progress, impediments, and audit findings. Status meetings will be held by either teleconference or in person. Status reports may be used as the basis of the status meeting discussions.

XII. TRAVEL

Contractor staff may be required to travel to USAC to perform Services under the Task Order. Contractors may invoice for up to 10% of the total Task Order value in travel expenses, provided Contractor complies with the terms and conditions of the USAC travel policies. All Contractor travel costs should be included in the Contractor’s proposed Task Order Ceiling Price.

XIII. TASK ORDER PROPOSAL SUBMISSION INSTRUCTIONS

Contractor response to this TORP shall be no longer than eight (8) Pages. All responses, to this TORP, are due no later than **11:00 AM ET, March 12, 2020**. Responses received after this date



and time or that do not follow the Task Order submission instructions, may not be considered for review.

Responses should be prepared simply and economically, and provide a straightforward and concise explanation of the information requested. Emphasis should be on completeness and clarity.

Please submit one (1) electronic copy (PDF) of your response to Becca Wray at rfp@usac.org. All submissions must include "Response to Task Order #5 – PMO" in the subject line. Please note: all electronic submissions must be limited to a maximum size of 25 GB.