

**Mock Task Order Request for Proposal #9:  
Business Transformation Office (BTO)  
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**

The purpose of this TORP is to establish a Business Transformation Office (BTO) reporting into the Strategy Division that provides enterprise project management support and serves as a center of excellence for USAC on project management standards and approaches. The BTO is intended to achieve the following objectives:

- Advance program management capabilities and create consistency across the varied project management approaches and capabilities across USAC’s 11 divisions
- Provide transparency and an integrated cross-organizational view to identify key dependencies
- Manage risk by providing visibility and proactively raising issues in a timely fashion
- Build project management capacity and equip project managers across USAC with best-in-class practices and tools to enable project success

## **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. PURPOSE OF THE TORP**

USAC's transformation stems from several FCC Modernization mandates, an ambitious Corporate Strategy, along with other critical projects. These initiatives are complex, have significant enterprise-wide interdependencies, and require thoughtful and deliberate approaches to project planning and implementation.

Currently, USAC's 11 divisions/departments have their own respective approach for managing projects. The different approaches hamper USAC's ability to create a consolidated view of the activities and insight into the major interdependencies between functions and initiatives. In addition, each division has different levels of maturity with regard to project management processes and capacity which makes this an enterprise-wide activity.

USAC has an opportunity to implement a project management capacity in the Strategy Division to support the divisions/departments in meeting their objectives.

## V. OBJECTIVES AND GOALS

USAC intends to achieve the following near-term goals through a BTO:

- Design the BTO while providing project management surge support in support of divisions/departments and initiatives that are most in need.
- Develop an approach for maturing the scope and capabilities of the BTO over time.
- Integrate an enterprise-wide project management discipline and standards into the organization.
- Build internal capacity at USAC to support the BTO through a collaborative partnership with an external vendor.
- Support initiative owners with strategic advisors to help address problems and proactively manage risks.

## VI. 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.

## VII. 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.

## VIII. 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.

## IX. SCOPE OF SERVICES AND DELIVERABLES

To meet the above objectives and goals, USAC is seeking a Contractor to provide consulting services to rapidly design and stand-up a BTO that is customized to address key project management gaps, address USAC’s unique needs, and structured to mature with the organization’s evolving transformation needs. Contractor shall leverage their knowledge of best practices and design a prototype BTO that consists of the following components:

- Develop an operating model for the BTO that identifies the core functions, capabilities, processes, and resource needs (e.g., staffing mix and technology) for successful implementation
- Establish a community of practice that connects project managers across the organization to support information sharing and the development of consistent project management approaches
- Design reporting tools, dashboards and project management templates to support the BTO
- Assist in the finalization of the enterprise project management software selection

Contractor shall also provide a detailed and comprehensive production schedule that includes a proposed schedule and approach for managing and providing the Services and Deliverables required by this TORP. Contractor should also outline any deviations from the TORP defined Services, Deliverables, or Objectives and Goals.

### A. DELIVERABLES

Below is a list of Deliverable that Contractor shall provide under the Task Order. Throughout the Term, Contractor shall solicit feedback on draft Deliverables from key audiences such as USAC leadership and divisional/departmental project managers. ***No later than the tenth week of the Term***, the selected Contractor shall provide drafts of the Deliverables, set forth below, to the USAC Project Manager (“PM”) for review and approval. Contractor shall provide final Deliverables incorporating the PM’s revisions and comments from the draft Deliverable by the end of the Term.

<b>Deliverable</b>	<b>Description</b>
<b>BTO Charter and Organizational Design</b>	Describes the BTO’s operating model including its core functions, capabilities, organizational design, performance measures, and a structure for facilitating effective governance.
<b>BTO Playbook</b>	Defines project management processes supporting the BTO functions, the interaction model between the BTO and divisions, and details the work flow of activities from project inception to completion, including roles and responsibilities.
<b>BTO Toolkit</b>	Includes a range of tools and templates that support the successful execution of the BTO Playbook including, but not limited to: a business case template, a project charter, status/reporting dashboard, and finalization of an enterprise project management solution.
<b>Community of Practice</b>	Launches a project management community within USAC that integrates the PM resources within divisions and structures an approach to support information sharing and the implementation of best practices. This deliverable also includes recommendations for capacity building through training & other suggested channels, a review of USAC’s PPM requirements to identify any gaps and provide ideas to capture and maintain BTO capabilities at USAC.

**X. 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.

**XI. 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](mailto: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](mailto:CoupaHelp@usac.org). For assistance on all non-Coupa related billing questions, Contractor may email [accounting@usac.org](mailto: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.

## XII. 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.

## XIII. 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.

## XIV. 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.

## XV. 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](mailto:rfp@usac.org). All submissions must include “Response to Task Order #10 – BTO” in the subject line. Please note: all electronic submissions must be limited to a maximum size of 25 GB.