

**Task Order Request for Proposal #3:
E-Rate Productivity Center (EPC) Development
Professional Services RFP – Enterprise IT Services 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 ENTERPRISE IT SERVICES 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 acquire IT professional services for its E-rate Productivity Center (“EPC”) Development, Modernization, Enhancements and Operation & Maintenance. As USAC requirements evolve, FCC policies and rules are introduced or amended, and stakeholder needs change, enhancements will be identified by USAC. This Task Orders may include introducing, designing, and implementing new technologies and architectural patterns to enhance EPC, provide O&M supports, and ensure USAC business applications meet business and consumer demands. The contractor will provide the staffing to perform the above activities.

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

One of USAC’s most critical systems is EPC. This large application, based on Appian technology, is the account and application management portal for the E-rate program. As such, it serves applicants, service providers, and their consultants, as well as all USAC internal users. The EPC system is the primary point of entry for most E-rate program transactions, reviews of applications, and notifications of USAC decisions. In EPC, program participants can complete and certify forms used to apply for E-rate support, obtain the status of their applications, submit requests, receive reminders and notifications, respond to review questions from USAC, receive official program

correspondence from USAC, and ask program-related questions. Additionally, internal USAC users rely on a series of workflows and complex business rules within EPC to flag potential program rule violations on application forms. Those requests are then routed to USAC reviewers for additional manual work, which includes contacting applicants to resolve any issues that will allow USAC to make a funding decision. Finally, the EPC system has multiple integrations with other systems within USAC to allow data from EPC to be shared across the USAC enterprise, and, as appropriate, through public-facing tools.

The current EPC system is built on the Appian product with a MySQL database hosted in the Appian cloud. The transaction data in EPC integrate with USAC Enterprise data repository for reporting and data analytics, and Great Plains Financial system for invoicing and billing. The EPC system supports more than 68,000 active users, and is used to disburse more than \$3 Billion of USF funds to schools and libraries across the country each year. The application consists of nearly 1,000 process models, with thousands of other Appian objects. The operations and maintenance activities are supported through 17 distinct Appian cloud environments which are all integrated with USAC's internal legacy applications and Data Mart through a VPN (Virtual Private Network). The size of EPC's production database is more than 22,000 megabytes (MB), and includes millions of supported documents in PDF, text, and Microsoft Office format. The production application relies on more than 700 database tables, with over 100 million distinct rows, and more than 500 stored procedures.

V. OBJECTIVES AND GOALS

USAC intends to implement all new Appian development work, technical enhancements, modernization, operations & maintenance, and production support through this task order. The contractor will provide the required qualified staff to fulfill these objectives.

VI. TASK ORDER PERIOD OF PERFORMANCE

The period of performance for the Task Order is twelve months (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 the following professional individuals to implement developments and enhancements identified by USAC and perform EPC Operation & Maintenance supports as needed.

Job Title	Qty	Key Personnel	Description
BPM/Appian Architect	2	Y	Bachelor’s Degree (Masters preferred) in Computer Science, a related field or equivalent experience. Fifteen years relevant IT experience with at least 10 years architecting BPM solutions and atleast 4years as Appian architect.
Appian Developer IV	3	Y	Bachelor’s Degree (Masters preferred) in Computer Science, a related field or equivalent experience. Ten years relevant IT experience with at least 3 years using Appian
Appian Developer-III	9		Bachelor’s Degree (Masters preferred) in Computer Science, a related field or equivalent experience. Eight years relevant IT experience with at least 2 years using Appian
My SQL DBA	1	Y	12Yrs as DBA with at least 4years using MySql

Each resource is expected to work 1,920 hours during the 12 month period. The contractor shall provide the hourly rates identified above using attachment 1 to the TORP.

A. DELIVERABLES

USAC will assign the required tasks to the individuals under this task order and the deliverables will be outlined and managed while the tasks are assigned.

X. KEY PERSONNEL & LABOR CATEGORIES

The key personnel are identified under section B. IX. 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.

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. 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.

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. Resumes, for Key Personnel, may be submitted as Attachment 1, to the response. Resumes may be no longer than two (2) 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 "Task Order #03 – EPC Development" in the subject line. Please note: all electronic submissions must be limited to a maximum size of 25 GB.