U.S. National Science Foundation

OTHER TRANSACTION AGREEMENT SOLUTIONS OFFERING (OTASO)
Project: National Coordination Lead for the TechAccess: AI-Ready America Program

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1.0 PURPOSE

The U.S. National Science Foundation (NSF) Directorate for Technology, Innovation and Partnerships (TIP) has launched the TechAccess: AI-Ready America program to accelerate Artificial Intelligence (AI) readiness and adoption across the U.S. Through this solutions offering, NSF seeks to identify the National Coordination Lead (National Lead) to work alongside NSF and the national TechAccess: AI-Ready America program partners.

This program is being developed in collaboration with the NSF Directorates for STEM Education (EDU) and Computer and Information Science and Engineering (CISE), and in partnership with several federal agencies whose missions intersect with the goals of the AI-Ready America program. Current federal partners include the U.S. Department of Agriculture's National Institute of Food and Agriculture (USDANIFA), the U.S. Department of Labor's Employment and Training Administration (DOLETA), and the U.S. Small Business Administration (SBA). These partners contribute sector expertise, workforce and small business insights, extensive awardee and stakeholder networks, alignment with national initiatives, and other capabilities that help ensure the National Lead's work builds on and complements ongoing federal efforts.

2.0 SCOPE

Built around three strategic priorities, the TechAccess: AI-Ready America program will strengthen coordination around AI readiness at local, state, and national levels in collaboration with community colleges, career and technical programs, trade and technical schools, and traditional colleges and universities; leverage existing networks, partnerships, consortia, and resources to accelerate AI adoption; and identify and address gaps that must be filled to advance AI readiness.

The program defines 'AI ready' as the capacity of communities, institutions, and the workforce to understand, apply, and create with AI, supported by a continuum of literacy, proficiency, and fluency across different roles and needs. Further, it views "AI-literacy" as starting with understanding "Why AI?" and "When AI?".

The program goals are to:

1. Enable all Americans to be AI-literate and AI-ready.
2. Empower businesses—especially small and emerging enterprises—to adopt AI to increase competitiveness, productivity, and growth.
3. Support local government and organizations in harnessing the power of AI to improve public services and spur local innovation.
4. Strengthen workforce capacity to apply and innovate with AI across education, business and economic sectors, and public services.

The AI-Ready America program supports the following three types of awards:

(1) State/Territory Coordination Hubs (Coordination Hubs) – one in every state, the District of Columbia (DC), or territory in the United States –connecting partners, strengthening planning and deployment, and rapidly scaling approaches;
(2) A National Coordination Lead (National Lead) – facilitating collaboration and knowledge sharing among Coordination Hubs, coordinating priority economic sectors, and informing national AI strategies; and
(3) AI-Ready Catalyst Award Competitions – a series of topic-driven competitions issued over the course of the program to pilot and scale innovative approaches that address critical national AI readiness needs—including those related to education and workforce training, local community capacity, and small- and medium-sized business adoption.

This solutions offering is the vehicle through which the National Coordination Lead for the AI-Ready America program will be selected. Coordination Hubs will be selected through solicitation NSF 26-508, which also includes additional information about the program as a whole. Proposers should also refer to the program's initiative page for updated information about the program as it evolves, including the release of AI-Ready Catalyst Award Competitions.

3.0 ANNUAL ESTIMATE AND PERIOD AND PLACE OF PERFORMANCE

Subject to the availability of funds, NSF anticipates making a five-year commitment to an organization selected for the National Lead award under this solutions offering with an expected award amount of $5,000,000 per year. The place of performance of any agreement made under this solutions offering will be within the United States at the awardee site.

4.0 INSTRUMENT AND APPROACH

Through this solicitation, NSF contemplates the issuance of an Other Transaction (OT) pursuant to the CHIPS and Science Act, 42 U.S.C. § 19116. An Other Transaction Agreement is not a Federal Acquisition Regulation (FAR)-based procurement contract nor a financial assistance transaction, but another system of contracting available to NSF by statute. NSF intends to make one award resulting from this solicitation. The award is expected to be structured as a combination of fixed-price and milestone-based payments, with the specific structure to be determined during contract negotiations. Prospective proposers should be aware that, as a pre-condition to the start of the award performance period, the awardee must stand up the National Lead organization.

This solicitation contemplates a competitive evaluation and award process. NSF will receive and evaluate proposals from interested organizations and perform a down-select based on the evaluation factors identified in this solicitation. Entities that are selected as part of this review may be invited to participate in oral presentations.

Detailed workstreams (including those described in section 6), data -handling, research security, privacy requirements, and other conditions will be finalized during OT agreement negotiations and may be refined as program priorities evolve over the period of performance. Any such refinements must be jointly discussed with NSF in advance, documented through agreement modifications, and justified to confirm that the work remains in scope and to address any associated budget implications. The award ceiling will remain at the amount specified in Section 3.

5.0 BACKGROUND AND ELIGIBILITY

Any responsible source organization (excluding foreign entities) may submit a proposal for consideration. All proposing organizations must have an active registration in the Federal Government's System for Award Management (SAM) prior to submitting a proposal (www.sam.gov). Proposing organizations are responsible for maintaining an active registration at the time of award and throughout the project period of performance. A proposal can involve multiple organizations, but the proposal must be submitted by a lead organization with subcontracts, as needed, to other participating organizations. An eligible organization can submit a maximum of one proposal as a lead.

An organization selected as the National Lead will be prohibited, for the duration of the award, from serving as a lead or partner on any State/Territory Coordination Hub awards or future Coordination Hub proposal submissions, and from participating as an applicant in AI-Ready Catalyst Award Competitions.

In compliance with the CHIPS and Science Act of 2022, section 10636 (person or entity of concern prohibition) (42 U.S.C. 19235) and section 10632 (malign foreign talent program prohibition)(42 U.S.C. § 19232), the following entities and individuals are not eligible to perform work under the OT agreement resulting from this solutions offering:

- Organizations on the Department of Commerce's Bureau of Industry and Security (BIS) Entity List;
- Any entity identified under section 1260h of the William M. (Mac) Thornberry National Defense Authorization Act (NDAA) for FY 2021 (10 U.S.C. 113 note; Public Law 116-283). The most recent list of entities may be found at here;
- Any "foreign entities of concern" as defined in section 10638(3) of the CHIPS and Science Act of 2022, which includes, among others, entities owned by, controlled by, or subject to the jurisdiction or direction of the government of the Democratic People's Republic of North Korea, the People's Republic of China, the Russian Federation, or the Islamic Republic of Iran; and
- Individuals who are a party to a *Malign Foreign Talent Recruitment Program*. The CHIPS and Science Act of 2022 defines a Malign Foreign Talent Recruitment Program as any program, position, or activity that is sponsored by a foreign country of concern that includes compensation in exchange for activities that may violate research security regulations. See full definition of a Malign Foreign Talent Recruitment Program here.

5.1 Characteristics of a Highly Qualified Organization

The National Lead is encouraged to assemble a team with a complementary set of partners to collectively deliver on program goals. These partners may include, for example, industry consortia, philanthropic organizations, non-profit entities, academic institutions (K-16), workforce and training organizations, and other entities that contribute relevant expertise or capabilities.

An organization serving as the National Lead must additionally demonstrate the following characteristics:

1. Capability to Execute an OT Award

The lead organization must have institutional capability to perform under an OT agreement, including flexible management approaches, streamlined compliance structures, and an understanding of how NSF's OT mechanism operates and how it differs from traditional NSF instruments. Direct experience working under OT authorities is beneficial but not required. Organizations without prior OT experience should demonstrate a clear readiness and institutional capability to operate effectively under this mechanism.

2. Operational Agility and the Ability to Stand Up a Semi-Autonomous Program Unit

The lead organization must be able to rapidly establish and manage a dedicated program team with appropriate governance, staffing, financial systems, and subcontracting capabilities. This team must be

able to function with agility, adapt to evolving program needs, and execute work at the pace required for national-scale coordination.

3. Comprehensive Expertise in AI Readiness Across Technical, Policy, Educational, and Applied Contexts
The proposing team must collectively bring deep technical understanding of AI, awareness of policy and regulatory considerations, and experience supporting education, workforce, and industry in becoming "AI-ready." This includes demonstrated experience with AI readiness planning, capacity building, and implementation—not limited to academic or research perspectives, but also including applied, hands-on, experiential, and/or field-oriented readiness work. Expertise may be distributed across partners, and together the team should credibly cover the full scope at a level appropriate for national coordination.

4. National Convening Power and Trusted, Neutral Stewardship
The lead organization must have demonstrated credibility and the ability to convene and coordinate across multiple states and territories and across sectors such as education, workforce, industry, and government. The lead organization should be recognized as a neutral, trusted entity that can maintain robust governance, avoid conflicts of interest, and support stakeholders at the national level.

5. Demonstrated Commitment of Key Personnel
To ensure effective execution of the National Lead responsibilities, the proposing team must identify Senior Key Personnel with significant and sustained time commitments to this award. For purposes of this solicitation, Senior Key Personnel (SKP) refers to individuals who are essential to the leadership, management, or technical execution of the proposed National Lead's scope of work. At minimum, the individual serving in the National Lead role (equivalent of the Principal Investigator) must commit no less than 75% full-time effort (0.75 FTE) to the project. Other core leadership roles should reflect meaningful levels of effort commensurate with their responsibilities. If SKP are proposed through subcontractor organizations, proposers must specify their FTE commitments and roles with the same clarity as for SKP employed by the lead organization.

6. Capacity to Execute the Full Set of Workstreams
The proposing team must demonstrate the capability to carry out all workstreams described in section 6, any additional workstreams included in the team's proposal, and any others established during OT agreement negotiations, and must be able to adapt activities as program needs evolve.

6.0 PERFORMANCE WORKSTREAMS
This section outlines the seven performance workstreams that the National Lead will be responsible for executing. Each workstream includes its objectives, required activities, and suggested timelines.

All workstreams should be understood in the context of the program goals described in section 2. These goals provide the framing for how the National Lead will design, prioritize, and execute activities under each workstream.

6.1 Workstream 1: State/Territory-level Coordination Hub Support and Technical Assistance
Provide direct support to State/Territory Coordination Hubs through, for example, Hub convenings focused on knowledge sharing, delivering targeted technical assistance, and elevating and disseminating effective practices. The task of the National Lead within this workstream is to enable, assist, and amplify state/territory efforts, and not to implement programs itself. Support under this workstream should strengthen Coordination Hubs' ability to carry out the five required responsibilities outlined in solicitation NSF 26-508 — (1) building a statewide public inventory of AI learning opportunities and resources; (2) developing a strategic plan for AI readiness; (3) providing deployment support; (4) coordinating

workforce training; and (5) convening priority economic sectors — as well as additional areas of need identified through ongoing needs assessments with Hubs.

At a minimum, the National Lead will execute the following specific activities under this workstream:

- **Conduct National Support Needs Assessments:** Gather input from Coordination Hubs to identify needs and gaps that guide tailored support and enable effective implementation of AI readiness strategies. Assessments should surface state-specific needs and highlight common challenges that require national solutions.
- **Develop a Technical Assistance Framework and Support:** Create a flexible model for providing advisory services, deployment guides, and implementation support tailored to needs of the Coordination Hubs. The framework should include mechanisms for rapid response to emerging challenges and guidance for integrating national standards and exemplary practices. Technical assistance should be responsive to Coordination Hubs' requests and aligned with the priorities identified in the needs assessment.
- **Design and Launch Communities of Practice:** Create structured forums for Coordination Hubs' leads and sub-groups to share learning and align work across states and territories.
- **Organize an Annual Coordination Hub Convening:** Plan and host an in-person convening annually for all Coordination Hubs to review progress, align strategies, strengthen cross-state/territory collaboration, and identify opportunities for joint planning.
- **Create and Maintain Shared Resources:** Develop, for example, templates for statewide AI readiness plans, performance metrics, and sector-specific implementation guides, based on content being generated by Coordination Hubs. Maintain a national repository of best practices and tools accessible to all Coordination Hubs. Resources should be updated regularly based on Coordination Hubs' feedback and evolving program priorities.
- **Support alignment of AI-readiness performance metrics:** Work with Coordination Hubs to develop, refine, and align AI-readiness performance metrics that reflect both local priorities and national program goals. Provide guidance, templates, and technical assistance to ensure Hub-level metrics are comparable, meaningful, and able to feed into national-level KPIs. This includes supporting Hubs in defining measures of participation, skill development, deployment impact, and other indicators of AI-readiness progress.
- **Monitor and Assess Effectiveness of Support:** Implement mechanisms for feedback from Coordination Hubs and continuous improvement.
- **Coordination with External Efforts:** Serve as a single point of contact for external organizations—including national and international AI-related initiatives—and support Coordination Hubs by identifying and facilitating relevant engagements with external efforts, whether surfaced by the Coordination Hubs, the National Lead, or federal partners.

Suggested Timeline and Milestones (non-exhaustive):

- **By month 3:** Complete a needs assessment with Coordination Hubs funded in Round 1 of the State/Territory Coordination Hub solicitation, and draft technical assistance framework based on assessment findings.
- **By month 6:** Launch initial communities of practice; publish initial shared resource templates and make repository accessible to Coordination Hubs; and schedule first annual in-person convening.
- **By month 12 and beyond:** Conduct first annual convening and document outcomes, demonstrate implementation of technical assistance framework, expand communities of practice, and refine resources based on feedback from Coordination Hubs.

6.2 Workstream 2: National-Level Knowledge Sharing, Visibility, and Identification of Gaps

Maintain national visibility and knowledge sharing by creating and managing public-facing information and communication activities that provide a nationwide view of program progress, sector initiatives, and

opportunities for engagement. This workstream also plays a critical role in identifying gaps across the AI-Ready America ecosystem—surfacing where additional resources, capacity, or coordination may be needed by Coordination Hubs, partners, or the broader federal, industry, and civic landscape.
This workstream ensures transparency, informs stakeholders, and integrates with other national-scale efforts.

At a minimum, the National Lead will execute the following specific activities under this workstream:

- **Develop publicly accessible tools and resources that:**
    - Provide accessible, data-driven insights into overall program progress as well as transparent, state-level comparative information—such as participants served, engagement by sector, and progress toward key milestones and AI-readiness performance metrics—to surface insights, highlight leading practices, and motivate strong performance across Coordination Hubs.
    - Depict how Coordination Hubs, sectors, and national initiatives relate to one another—offering a coherent view of the national AI-readiness ecosystem that helps identify collaboration opportunities, reduces duplication, and strengthens alignment across states and sectors.
    - Ensure that public-facing information from Coordination Hubs is readily surfaced and accessible.
    - Serve as an entry point for individuals, organizations, and companies to engage with AI-Ready America as participants and/or partners.
- **Spotlight efforts across all workstreams from the Coordination Hubs and National Lead:**
    - Highlight representative activities.
    - Feature success stories and emerging best practices from across the network.
- **Offer engagement opportunities:**
    - Host webinars, virtual briefings, and other outreach and engagement events to onboard new stakeholders and share updates.
    - Maintain a calendar of upcoming events and collaboration opportunities.
- **Identify and surface gaps:**
    - Analyze information from Coordination Hubs, sector coordination efforts, public-facing tools, and national engagement to identify gaps in resources, capacity, or coordination. Summaries of identified gaps should help Coordination Hubs, the AI-Ready America program, federal partners, industry, and others understand where additional support or investment may be valuable.
- **National Visibility and Network Representation:**
    - Elevate AI-Ready America's work by representing the program within national and international AI-related networks and sharing progress and insights from across the Coordination Hubs.

Suggested Timeline and Milestones (non-exhaustive)

- **By month 3:** Deliver an initial set of publicly accessible tools and resources that provide early program insights and surface preliminary indications of potential gaps in resources, capacity, or coordination across states and sectors. Make public-facing information from Coordination Hubs easily accessible.
- **By month 6:** Begin spotlighting efforts across State/Territory Coordination Hubs and the National Lead, and begin engagement opportunities.
- **By month 12 and beyond:** Expand the set of publicly accessible tools and resources, increase the frequency and depth of highlighted stories and best practices, broaden opportunities for stakeholders to engage with AI-Ready America, connect with other relevant networks and national initiatives, and routinely surface gaps that become apparent.

6.3 Workstream 3: National AI Deployment Support

Establish specialized national-level AI deployment capacity that Coordination Hubs may access if/when their locally led AI Deployment Support efforts exceed the scope of Workstream 1. This workstream provides advanced expertise and implementation capabilities that individual states or territories are unlikely to develop independently, complementing—rather than duplicating—the Hubs' support for civic organizations, small- and medium-sized businesses, and other locally grounded entities. All activities under this workstream should be informed by demonstrated needs surfaced by Coordination Hubs and partners and stakeholders central to the National Lead.

Activities under this workstream may include, but are not limited to:

- **Identify and validate national level needs:** Work closely with Coordination Hubs and others to determine where specialized AI deployment capacity is clearly required and not feasible at the state or territory level.
- **Practitioner training, skilling, or credentialing:** As appropriate, develop national-level training, competency frameworks, and credentialing pathways to grow a pipeline of qualified AI deployment practitioners who can support states, territories, and local organizations.
- **Practitioner support capacity (e.g., AI Deployment Corps):** If identified as a need, establish a national pool of specialized practitioners—such as experts in applied AI deployment, curriculum design, workforce development, sector-specific implementation, evaluation, or other areas—available to provide targeted expertise or surge support upon request.

Suggested Timeline and Milestones (non-exhaustive):

- **By month 3:** Complete an initial assessment of national level AI deployment needs surfaced by Coordination Hubs. Establish criteria and processes for determining when national level deployment support is warranted.
- **By month 6:** Launch initial, needs validated national supports (e.g., targeted practitioner expertise or foundational training materials). Begin developing practitioner training or credentialing components if/where strong demand is demonstrated.
- **By month 12 and beyond:** Expand national level deployment support capacity based on evolving, evidence-based needs.

6.4 Workstream 4: Industry and Philanthropy Engagement

To enable greater program impact and support increased national coordination, partner with industry and philanthropic organizations to contribute resources, expertise, and direct assistance—supporting State/Territory Coordination Hubs, National Coordination Lead activities, and AI-Ready Catalyst Awards. Where appropriate, coordinate with relevant federal partners to ensure alignment with national initiatives. This workstream ensures that the program leverages external capabilities and investments to amplify impact.

At a minimum, the National Lead will execute the following specific activities under this workstream:

- **Develop and implement a national engagement strategy:**
    - In coordination with NSF and the program's federal partners, identify and prioritize potential partners across industry and philanthropic organizations who are aligned with the goals of the AI-Ready America program.
    - Create mechanisms for partners to contribute to specific awards or to specific workstreams and activities (e.g., deployment support, workforce training, sector-specific initiatives, AI-Ready Catalyst Awards).
- **Facilitate partnerships and resource contributions:**
    - Align partner contributions with needs identified by Coordination Hubs and the workstreams of the National Lead.

    - Secure financial and/or in-kind support (e.g., technical expertise, tools, cloud computing support, data storage and management, other infrastructure) to complement program funding.
- **Promote sustained collaboration:**
    - Host briefings, roundtables, and targeted outreach and engagement events to maintain partner engagement and expand participation.
    - Develop communication materials that highlight partnership impact stories and partnership opportunities.

Suggested Timeline and Milestones (non-exhaustive):

- **By month 6:** Launch initial engagement strategy and begin outreach to priority industry and philanthropic organizations.
- **By month 12 and beyond:** Formalize partnerships, integrate contributions into program activities, and expand engagement through ongoing events and communications.

6.5 Workstream 5: National Coordination Within Priority Sectors

The purpose of this workstream is to selectively strengthen coordination in priority sectors where national level support is needed and not already well served by existing efforts. Sector selection should be informed in part by Coordination Hub input, supplemented by perspectives from other key stakeholders and national partners. The National Lead should focus on sectors where Coordination Hubs identify clear gaps, opportunities for shared tools, or needs for alignment—not areas where strong sector coordination already exists. The National Lead should propose a transparent process for surfacing candidate sectors and presenting recommendations to NSF for approval.

At a minimum, the National Lead will execute the following activities under this workstream:

- **Identify priority sectors:** Work with Coordination Hubs and other key stakeholders to determine sectors where national level support would add substantial value.
- **Curate and share sector-focused resources:** Compile and disseminate tools, implementation guides, regulatory considerations, and examples relevant to selected sectors. When strong resources or sector initiatives already exist, the National Lead should amplify and connect rather than recreate them.
- **Facilitate targeted cross sector learning:** Where appropriate, convene sector stakeholders and Coordination Hubs to surface challenges, share effective approaches, and identify areas of cross sector transferability.
- **Support pathways for small businesses and K–16 education where relevant:** Integrate opportunities for small business participation and connections to K–16 readiness efforts.

Suggested Timeline and Milestones (non-exhaustive):

- **By month 6:** Identify an initial set of priority sectors based on Coordination Hub input; begin curating and sharing relevant resources.
- **By month 12 and beyond:** Expand sector coordination only as appropriate; deepen resource development, broaden stakeholder participation, and support cross sector learning.

6.6 Workstream 6: Develop and Execute AI-Ready Catalyst Award Competitions

The AI-Ready Catalyst Award Competitions are designed to rapidly pilot and scale approaches that address high-priority national needs in AI readiness. Competitions are likely to take one of two forms:

Cohort-Based Competitions which support groups of awards to jump-start new approaches or scale proven models; and
Strategic Implementation Awards which supports a single award with national reach.

Catalyst Award Competitions may be executed either by NSF or by the National Lead, depending on program needs. When executed by the National Lead, Catalyst Awards will be issued as subawards under this OT agreement, funded through allocations approved by NSF. If the National Lead is tasked with executing Catalyst Award Competitions, NSF anticipates providing additional funds to support the Catalyst Awards. The National Lead will design and administer the full competition lifecycle—including applicant-facing operations, review management, and preparation of award documentation—while NSF retains responsibility for approving competition topics, confirming evaluation criteria, and authorizing the National Lead's recommended funding allocations.

When the National Lead runs a competition, it will manage the full competition life cycle in partnership with NSF—from design and review processes to onboarding and post award support (e.g. collaboration, learning, and dissemination). When NSF runs a competition, the National Lead will still provide post award support.

During negotiations, NSF and the selected awardee will define the expected scope of the National Lead's competition management responsibilities for the first 12 months.

In the case where the National Lead executes the competition, at a minimum the National Lead will execute the following activities under this workstream:

- **Design Competition Models:** Develop cohort-based or strategic-implementation competition structures that enable rapid piloting or scaling of AI readiness approaches.
- **Develop Processes and Criteria:** Establish clear competition topics, evaluation criteria, review structures, and award decision processes in coordination with NSF.
- **Execute End-to-End Competitions:** Launch calls for proposals, support applicants, manage application intake, coordinate reviews, synthesize reviewer input, prepare documentation for NSF approval of award allocations, and issue Catalyst Award subawards/subcontracts in accordance with the approved funding decisions and the National Lead's OT agreement.
- **Ensure Compliance:** Implement competition processes that meet federal expectations for privacy, data handling, research security screening, and integrity.
- **Support Awardee Implementation:** Provide technical assistance and facilitate communities of practice that enable awardees to collaborate, share learning, and align with program goals.
- **Document and Share Learnings:** Capture insights from award activities and share resources, tools, and effective practices across the AI-Ready America network.

Note that NSF will not require access to the National Lead's application management systems beyond what is necessary for oversight and research security screening. Specific access requirements will be negotiated during award.

Suggested Timeline and Milestones (non-exhaustive):

- **By month 6:** Onboard awardees from Catalyst Award Competitions executed by NSF.
- **By month 12 and beyond:** Participate in NSF-run Catalyst Award Competitions to gain an understanding of the merit review approach to be undertaken. Suggest competition topics based on stakeholder input. The National Lead is likely Execute competitions starting in year 2.

6.7 Workstream 7: Documentation and Reporting of Progress Towards Technical Milestones, Performance Metrics, and Key Learnings

Collect, organize, and report data on progress toward program goals, technical milestones, and key learnings. This includes establishing Key Performance Indicators (KPIs) that enable NSF and its program partners to monitor progress, assess effectiveness, and ensure the National Lead is advancing the goals of

the AI-Ready America program. The reporting framework developed under this workstream should integrate data flows from Workstreams 1 and 2 to the maximum extent feasible, including aligning and reconciling performance metrics used across these workstreams to ensure consistency and reduce duplicative reporting.

At a minimum, the National Lead will execute the following specific activities under this workstream:

- **Implement and execute a structured reporting framework:**
  - Define standardized templates and processes for capturing progress across all workstreams and in standing up and executing the National Lead as an organization.
  - Ensure timely submission of milestone updates and performance metrics.
  - Define standardized templates and processes for budget reporting.
  - Deliver concise progress summaries for NSF and partners at agreed intervals, with written reports provided quarterly, an annual report, and additional discussions at least monthly.
- **Develop targeted analytical briefs:**
  - Produce analytical briefs and/or issue summaries on topics of high importance identified through program activities, including trends surfaced through Coordination Hubs, sector coordination efforts, deployment activities, and national-level knowledge sharing. These papers should synthesize insights, identify emerging needs or opportunities, and provide actionable recommendations for NSF, federal partners, and the broader AI readiness ecosystem.
- **Conduct a structured, independent evaluation of program implementation and outcomes:**
  - Develop and execute an evaluation plan that assesses effectiveness across all workstreams, including progress toward technical milestones, quality and impact of National Lead activities, and adoption outcomes across Coordination Hubs. The evaluation should include qualitative and quantitative methods, track performance against established program performance KPIs, surface systemic lessons learned, and provide actionable recommendations to NSF on program improvement and scaling.

Suggested Timeline and Milestones (non-exhaustive)

- **By 3 months:** Establish initial program performance KPIs and targets—finalized in consultation with NSF—develop the reporting framework, and begin reporting.
- **By Month 6:** Begin formulating evaluation activities.
- **By month 12 and beyond:** Develop analytical briefs as topics of significance emerge.

7.0 WRITTEN PROPOSAL

Proposals for the OT contract shall be direct and concise and use at least an 11-point font and letter-sized pages (i.e., 8 ½" by 11") with 1" margins on all sides. Tables or graphs may use a 10-point font size. The proposal shall be submitted as a PDF. Proposals that do not meet these format specifications may be removed from consideration.

7.1 Title Page
(Does not count towards the proposal page limit)

The title page must include the lead organization's name, unique entity identifier (UEI) number, point of contact for communications, and the contact information for that point of contact.

7.2 Body of the Proposal

The body of the proposal must provide concise and comprehensive information describing how the proposing organization will support the objectives outlined in this solutions offering. Proposals must include all Components, Parts, and required Supplemental Material described below and must use the

specified headers. The narrative portion may not exceed 20 pages, and proposers must adhere to the page limits specified for each component. Proposals that do not meet these format requirements may be removed from consideration.

Component 1 - Vision and Approach to Workstreams (up to 3 pages)
Describe the proposing team's vision for national coordination and how it aligns with program goals, purpose of the National Lead, and the specific workstreams described in section 6.

Items to include but not limited to:

- An overall vision as well as a concise vision for each workstream described in section 6, highlighting how each workstream will contribute to advancing a coherent national strategy. Additional workstreams may be proposed if they do not fit within the already named workstreams and the proposing team believes they are essential to program success.
- Where relevant, describe how the vision and approaches complement, strengthen, and leverage existing national efforts related to AI readiness, demonstrating the proposing team's understanding of the national landscape.

Component 2 – Work Plan, Milestones, and Performance Metrics (up to 8 pages)
Present a clear work plan aligned with each of the seven workstreams described in sections 6.1-6.7 and any additional workstream(s) described in Component 1 of the proposal. The plan should include contracting milestones, timelines, and measurable indicators of progress. The information in this component must align with the budget and leveraged resource commitments from partnering organizations.

For each workstream, items to include but not limited to:

- A phased implementation plan, including key milestones and deliverables for each phase.
- How progress will be monitored, including a set of at least six performance metrics by which each phase will be tracked.
- How the need for changes to focus and approach will be assessed.

Component 3 – Organizational and Team Expertise, and Partnership Rationale (up to 7 pages)
Describe specific information about the qualifications and capabilities of the proposing team to take on the role of the National Lead and should be organized into the two parts described below.

Part 1 — Team Expertise and Partnership Rationale
Describe the expertise, structure, and composition of the proposed National Lead team, including the roles of partners and subcontractors and how the team collectively covers the capabilities required for the award.

- **Lead organization overview:** A short introduction of the organization's purpose, history, and value proposition describing why your organization is the right fit to partner with NSF and partners on this activity.
- **Organizational chart:** visual depicting the proposed structure of the National Lead, including personnel, titles, FTEs, and affiliated organization.
- **Key Personnel and Roles:** Describe the key personnel who will lead and execute the National Lead responsibilities (up to three sentences per individual).
- **Partnership Rationale and Structure:** Include a table summarizing all partner organizations and the capabilities they provide.
- **Subcontractors:** If subcontractors are proposed, provide brief descriptions of their roles and explain how their involvement fills capability gaps or enhances the team's ability to execute the workstreams. Indicate how quickly subcontractors can be onboarded.

- **Team Collaboration, Governance, and Decision Making:** Describe any key governance structures, decision-making processes, and any planned use of governance, advisory boards, or external experts to support execution of the award.

Part 2 — Foundational Organizational Capabilities
Describe how the lead organization meets each of the characteristics required of the National Lead, as outlined in section 5.1—Characteristics of a Highly Qualified Organization. The narrative should include specific prior experience, where applicable.

Component 4 – Resource Mobilization and Leveraging Additional Support (Up to 2 pages)
Explain strategies for attracting additional resources to complement NSF funding and enable full implementation of the National Coordination Lead's responsibilities across its set of workstreams throughout and beyond the award period. This section should expand on the proposing team's understanding of the national landscape and the role of the National Lead within that.

Items to include, but not limited to:

- Plans for securing additional financial support, in-kind support, or access to resources, in industry, philanthropy, or other sources.
- Plans for coordinating with other substantial national efforts.
- How these resources and efforts will be integrated into the lead's activities to expand reach and impact.

Supplemental Material (Required)

- **Appendix A - Biosketches:** Provide a biosketch for each Senior Key Personnel (1 page per biosketch) listed in Component 3 of the proposal narrative.
- **Appendix B - Partnerships:** for the set of partners listed in Component 3 of the proposal narrative:
  - Provide a partner commitment summary- table.
  - Provide a Letters of collaboration/commitment from each partner (up to 0.5 pages for each).
- **Appendix C - Capability to Execute an Other Transaction (OT) Award:** Provide a letter from the Authorized Organizational Representative confirming the organization's ability to execute an OT.
- **Appendix D - Demonstrated Ability to Execute Workstreams:** Submit up to three example projects that demonstrate the organization's capabilities and will facilitate NSF's review, evaluation, and selection process described in this solutions offering. Limited to 1 page per example. Each example must contain, at least, the following information:
  - Title and location of the project.
  - Period of performance.
  - Place of performance.
  - Description of the project and its relevance to the workstreams described in this solutions offering.
  - The role your organization played in the project.
  - Project results or key achievements and the extent to which the organization was successful in achieving project objectives on time and in budget.

7.3 Proposal Budget and Budget Justification

(No page limit)
A budget projection and accompanying budget justification must set forth the amount of funding requested, by budget category, for the first 12 months of effort. The budget justification shall provide a

detailed breakdown for each category as well as a rationale to support the expenses proposed. The budget justification must contain sufficient information to allow for meaningful evaluation of the proposed level of effort.

Subject to the availability of funds, the actual funding provided to an organization under this solutions offering will be subject to negotiation prior to making any award.

Direct Labor – Breakdown of direct labor identifying the individuals (in alignment with section 7.2 Component 3 of the proposal narrative), labor categories, pay rates, and projected level of effort devoted to the project, and their associated subtotals.

Direct Labor Overhead/Fringe Benefits – Rate(s) and base(s), and the cumulative effect on labor costs.

Materials, Supplies, and Equipment – Description and cost of materials, supplies, and equipment, to include the basis of the cost estimate (e.g., historical data, competitive market quotes, and in-house transfers).

Travel – Breakdown of travel and transportation costs for the OT contractor staff to attend in-person events in the first 12-months such as cohort convenings and outreach events. Proposed travel must include the following for each trip: the purpose of the trip, origin and destination if known, approximate duration, the number of travelers, and the estimated cost per trip must be justified based on a reasonable basis for estimation.

Subcontracts – For proposals that contain one or more subcontracts to other participating organizations to support activities under each of the workstreams listed in section 7, include a separate subcontractor budget for each planned entity that provides a comparable level of detail to the budget submitted for the overall proposal. Do not include funds that will be distributed to participating teams via subcontracts, since they will be identified and added to the OT contract post-award. For subcontractor Senior Key Personnel, proposers should align FTE levels with the responsibilities described in Workstreams 1–7 to ensure coherent and efficient execution across the partnership.

Consultant Services – Breakdown of each individual's expertise, primary organizational affiliation, normal daily compensation rate, and number of days of expected service, as well as any expected travel costs.

Other Direct Costs – Breakdown of other direct costs not already included elsewhere in the budget.

Indirect Costs – For each indirect rate (identified here and elsewhere), indicate if the proposed indirect rate and allocation base have been approved by a government audit or cognizant agency for use in proposals; when the rate(s) was approved; and the name of and telephone number of the cognizant auditor or approving official.

Fee – Fee may be proposed, and if proposed, is subject to negotiations and applicable statutory limits.

7.4 Data Management and Privacy Plan

(Limited to 2 pages)

The applications submitted to the OT contractor by researchers, innovators, and entrepreneurs are considered sensitive and confidential. Therefore, the OT contractor must adhere to safeguards and controls when handling this information. Note that the OT contractor will provide NSF with access to data necessary for program. Specific data handling and access requirements will be determined during OT agreement negotiations.

Proposals shall address within the Data Management and Privacy Plan their plans for data protection, handling, and sharing during the performance period across their organization, with NSF and others, including partners, subcontracts, and the general public. Additionally, proposals shall specify the types of data or products that will be generated as well as formats to be used and how these data or products are to be stored, preserved, and shared. As part of this, proposing organizations must describe their capability to securely manage sensitive applicant data received during future Catalyst Award Competitions.

7.5 Letters of Commitment

(No page limit)

Signed one-page letters of commitment from proposed subcontractors listed in the budget where the subcontractors outline what work they will perform as part of the effort and why they are uniquely qualified to lead that work. These signed letters of commitment should include a statement from an authorized subcontractor representative that they have read this solutions offering, understand the program's need to move quickly, and are prepared to provide the necessary resources and ramp up quickly in support of this need.

7.6 Conflicts of Interest

(No page limit)

The proposing organization must include a statement describing any potential financial interests that the organization may have that could create conflicts of interest with the work to be performed in its proposal. The proposing organization must also include their plan to resolve any potential and actual conflicts. This statement applies to the OT contractor, its employees, consultants, and any subcontractors who will perform work under the proposing organization's proposal. Given the nature of this requirement, it is possible for a conflict to arise after an award is made that is not otherwise anticipated. Due to this possibility, the OT agreement will include language requiring that the selected organization(s) notify NSF if a conflict arises post-award and how the organization(s) intend to address the conflict, including a proposed mitigation plan.

8.0 ORAL PRESENTATION

8.1 Oral Presentation Instructions

Oral Presentation: Proposers may be invited to virtual oral presentations. Any virtual oral presentations are currently estimated to occur during August or September 2026. By participating in oral presentations, proposing organizations acknowledge that they are in compliance with all solutions offering rules and parameters, in accordance with applicable laws and statutes.

Presentation Participants: No more than 8 total individuals from proposing organizations shall attend the oral presentation. Participants must be personnel that the proposing organization deems as senior key personnel and/or responsible organization official(s). Participants must be employees of the proposing organization or major subcontractors.

Oral Presentation Format: The oral presentation format will be provided to the proposing organizations invited to participate at least 1 week in advance.

A set of questions may be distributed to the invited proposing organizations. Responses to these questions will be due prior to participation in oral presentations and will be rated using the same elements and rating guidelines as described in section 9.

NSF and its program partners intend to engage in interactive dialogue during the oral presentations. These exchanges are viewed as a component of the oral presentation itself and used to clarify elements of the oral presentation.

Recording of Oral Presentations: Recording oral presentations by proposing organizations is strictly prohibited, notwithstanding local laws and regulations with regards to virtual meetings or voice-only telephone oral presentations. However, NSF reserves the right to record oral presentations. If NSF records the presentation, the recording will be considered source-selection sensitive and handled accordingly.

9.0 EVALUATION GUIDELINES

Proposals and Oral Presentations will be evaluated in accordance with the selection criteria listed in this section.

9.1 Major Criteria One: Organizational Experience, Strengths, and Capabilities

The extent to which the proposing organization demonstrates the core capabilities required of the National Lead, including:

- Ability to execute an OT award effectively;
- Operational agility to stand up and manage a semi-autonomous program unit;
- Comprehensive AI-readiness expertise across technical, policy, education, workforce, and applied contexts;
- National convening power and the ability to serve as a trusted, neutral coordinator;
- Ability to execute each of the required workstreams and any additional workstreams identified in the proposal; and
- Strength, clarity, and appropriateness of the proposed team and partnership structure, including expertise, qualifications, and time commitments.

9.2 Major Criteria Two: Workstream Execution Approach

The extent to which the proposal presents a coherent, feasible, and well-integrated plan for executing all workstreams, including:

- Clarity of vision and approach in alignment with purpose and goals of the TechAccess: AI-Ready America program;
- Clear strategies, milestones, and performance metrics;
- Realistic, phased implementation plans; and
- Evidence that the team understands the scope, complexity, and interdependencies of the workstreams.

9.3 Budget Realism and Alignment

The extent to which the proposed budget, additional resources, and justification:

- Reflect a realistic allocation of resources to accomplish the proposed work;
- Align with the proposed milestones, staffing plan, and scope of activities;
- Demonstrate understanding of the demands of standing up and operating the National Lead organization; and
- Outline credible strategies for mobilizing additional resources to expand impact beyond NSF funding.

The evaluation will be conducted using the following rating structure:

Highly Competitive	The proposal provides strong, compelling evidence that the proposing organization fully understands the requirements, presents a clear and feasible plan, and demonstrates a high likelihood of successful performance. Reviewers have high confidence that the proposing team can effectively execute the responsibilities of the National Lead and achieve the intended outcomes.
Competitive	The proposal provides adequate evidence of understanding and capability, with a plan that is generally feasible but contains minor weaknesses, uncertainties, or gaps. Reviewers have moderate confidence that the proposing team can perform successfully, though some aspects may require clarification, strengthening, or additional detail.
Not Competitive	The proposal provides insufficient evidence of understanding, feasibility, or capability. Significant weaknesses, gaps, or concerns reduce reviewers' confidence that the proposing team can successfully execute the responsibilities of the National Lead or achieve the expected outcomes.

10.0 SUBMISSION DETAILS

Proposals will not be accepted after 4:00 p.m. (Eastern Daylight Time) on July 21, 2026.

Proposals must be submitted in complete form, by an authorized organizational representative who is empowered to make certifications and representations and can commit the proposing organization to the conduct of the project. Proposals must also comply with the proposal content and format requirements listed in section 7 of this solutions offering. Proposals must be submitted via email to Benjamin Patterson (bpatters@nsf.gov).

The subject line of your submission email must include the following: "AI-Ready America National Lead Proposal"

Questions concerning this solutions offering may be accepted by the Government through 4:00 p.m. (Eastern Daylight Time) June 15, 2026. Questions must be submitted via email to ai-ready@nsf.gov. The subject line of any submitted questions must include the following: "AI-Ready America National Lead Questions".

11.0 REVIEW, EVALUATION, AND SELECTION PROCESS

Review: NSF will perform a compliance review to ensure (1) that written proposals were submitted by eligible proposing organizations; and (2) that the proposals are complete in accordance with the requirements described in this solutions offering. Following this initial compliance review, the proposals will be provided to an NSF or NSF and partners evaluation team.

Evaluation: Written proposals received in response to this solutions offering will be reviewed by the evaluation team in accordance with the selection criteria listed in section 9 of this solutions offering. After reviewing the written proposals, the technical evaluation team will create a rank ordering of the most qualified proposing organizations. Rankings will be based on confidence ratings reflecting the evaluation team's consensus assessment of an organization's potential for successful performance under the OT agreement. Proposed budgets will be reviewed for realism, reasonableness, and alignment with the proposed approach and milestones. Budget realism and alignment may inform NSF's confidence assessment, but final funding amounts and payment structure will be negotiated prior to award.

- *Oral Presentations:* Based on the evaluation of written proposals, the Agreements Officer may perform a down selection wherein NSF or NSF and partners will remove lower ranked proposing organizations from further consideration and the most qualified proposing organizations may be invited to participate in virtual oral presentations. Oral presentations are optional at NSF's discretion and are not required for NSF to enter into negotiations or award an OT agreement under this solutions offering. See sections 8 of this solutions offering for oral presentation instructions, should NSF choose to exercise this option. Following the evaluation of oral presentations, the evaluators will create a rank ordering of the prospective organization(s) deemed to best satisfy the selection criteria listed in section 9 and best qualified to perform the work according to the evaluation team's review of the oral presentations.

Selection: Subsequently, NSF will enter into negotiations with the organization that is most highly rated. If the first selected organization and NSF are unable to reach mutually agreeable terms for award, NSF will enter into negotiations with the next highest rated organization. This process will continue until an OT agreement with a selected organization is finalized or NSF decides to cancel this solutions offering.

12.0 AGENCY CONTACTS

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