



Online Giving: Landing Pages

REQUEST FOR PROPOSAL

Document Reference USO-D&M-LNDPGS2019

July 16, 2019

KEY DATES	
Request for Proposal Released	July 16, 2019
Deadline for Questions	July 23, 2019
Deadline for Proposals	August 2, 2019
Notification of Down-select and Presentation	August 9, 2019
Deadline for Presentations	August 23, 2019
Projected Award Date	September 6, 2019
Projected Start Date	September 23, 2019



ABOUT THE UNITED SERVICE ORGANIZATIONS

The USO strengthens America's military service members by keeping them connected to family, home and country, throughout their service to the nation. We are the *Force Behind the Forces*SM.

For more than 77 years, the USO, a private, nonprofit organization, has served the men and women of the U.S. military and their families throughout their service – from the moment they join, through their deployments and as they transition back to their communities.

Today's service members need the care, comfort, connection and support that can only be provided by an organization that is with them at every point of their military journey, wherever they serve. The USO is continuously adapting to the needs of our men and women in uniform and their families so they can focus on their important mission.

Although the USO is congressionally chartered and works in close partnership with the Department of Defense, the USO is not part of the federal government.

We are a family of volunteers, sustained by the charitable contributions of millions of generous Americans and united in our commitment to support America's service members by keeping them connected to the very things they've sworn to defend – family, home and country. Our work is America's most powerful expression of gratitude to the men and women who secure our nation's freedoms.

Last year, the USO launched the four-year, \$500 Million Fueling the Future Campaign, a bold initiative that will give our service members the critical connections they need to stay strong and resilient. By 2020, the USO will expand access to USO centers and programs around the world, increase annual service connections and boost transition services for our service members and their families throughout their time of duty. In every corner of the world, our service members will know that the USO is always by their side.

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PROJECT SUMMARY

This project will deliver a consolidation of web donation landing page technology and incorporate field-proven strategies for improving the conversion performance of these pages. Technology consolidation will enable the USO to provide a more consistent donor experience, improve metric capture and reportability, and increase the capability for internal USO staff to maintain landing pages and meet future campaign needs.

The impact of the technology consolidation will be an increase in web donation conversion rates, an improved integration of landing page data within the broader USO data landscape, and enhancements to security of donor personal and payment information.

The USO seeks to team with a vendor whose expertise in the non-profit web donation channel is matched by their development of donor experiences which incorporate the most applicable best practices from commercial e-commerce. The selected vendor will implement their recommendations in an agile and cost-effective manner, delivering an operational system with change management assistance that achieves all the business requirements stated in this RFP.

Purpose

The USO expects to make one award under this RFP. The period of performance will be as bid by the awardee. The anticipated contract award date is approximately September 6, 2019.

This will be a Time and Materials contract. The Vendor will operate at the direction of and receive guidance from the USO.



RECOMMENDED STEPS FOR SUBMISSION

1. Review the Requirements

Examine all sections of the RFP and learn about the USO.

2. Consider the Evaluation Criteria

Consider the organization eligibility requirements and the USO's specific requirements to see whether your organization, your interests, and your capabilities fit this project. Check with the USO for any modifications or amendments up to the submission deadline.

3. Develop Your Proposal

Develop your response to accomplish the Scope of Work (SOW).

4. Follow Submission Guidelines

See the [Submission Guidelines](#) section of this document.

5. Submit Your Proposal

Proposals are due by 5 P.M. (ET) on August 2, 2019.



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BACKGROUND

For more than 78 years, the USO has been the nation's leading organization to serve the men and women in the U.S. military, and their families, throughout their time in uniform. From the moment they join, through their assignments and deployments, and as they transition back to their communities, the USO is always by their side.

Today's USO continuously adapts to the needs of our men and women in uniform and their families, so they can focus on their very important mission. We operate USO centers at or near military installations across the United States and throughout the world, including in combat zones, and even un-staffed USO service sites in places too dangerous for anyone but combat troops to occupy.

USO airport centers throughout the country offer around-the clock hospitality for traveling service members and their families. Our trademark USO tours bring America and its celebrities to service members who are assigned far from home, to entertain them and convey the support of the nation. And our many specialized programs offer a continuum of support to service members throughout their journey of service, from the first time they don the uniform until the last time they take it off.

The USO is not part of the federal government. A congressionally chartered, private organization, the USO relies on the generosity of individuals, organizations and corporations to support its activities, and is powered by a family of volunteers to accomplish our mission of connection.

In order to maintain, and expand, execution of our current mission, the USO executes multi-channel campaigns for donor acquisition and cultivation. These efforts span multiple solution providers and technology platforms, all supporting customer acquisition or contribution processing.



PROJECT REQUIREMENTS

Scope of Work (SOW)

The Vendor selected will define and implement a landing page strategy which incorporates best practices from commercial e-commerce to achieve improved lead generation, first-time gifts, and sustainer conversion.

Tasks and Subtasks

1. Task 1 – Project Management

The Vendor will provide project management support throughout the lifecycle of the project. This includes the management and oversight of all vendor activities to satisfy the requirements identified in this SOW, communications and coordination with USO stakeholders, financial tracking and periodic reporting. The vendor shall identify a Project Manager, (PM) by name who shall serve as the primary interface and point of contact with the USO assigned project manager. The designated PM shall be considered key personnel and shall participate in the oral presentation as described in the submission guidelines below.

Task 1 for this project shall include the following subtasks.

- 1.1 Subtask 1.1 - Kickoff Meeting. Coordinate and conduct a project kickoff meeting including but not limited to the following topics.
 - i. Introduction of team members and personnel involved with the delivery of the project including roles and responsibilities.
 - ii. Overview of understanding of the objectives of the project.
 - iii. Overview of notional project timeline with identification of critical path highlighting dependencies on USO staff for successful implementation.
 - iv. Communication plan
 - v. Risk assessment of top project risks including proposed risk mitigation highlighting areas of assistance needed from USO.
 - vi. Projected project financial burn line from kickoff through project completion.
- 1.2 Subtask 1.2 - Weekly Progress Report. Provide weekly progress summary including but not limited to the following:
 - i. Summary of activities completed in previous week
 - ii. Planned activities for following week.
 - iii. Newly identified risks



iv. Questions or concerns requiring USO response and action

1.3 Subtask 1.3 – Monthly Progress Report. Provide monthly progress summary including but not limited to the following:

- i. Summary of accomplishments in the previous month
- ii. Progress relative to project schedule with updated revised dates and explanation of changes to project schedule as needed.
- iii. Projected activities for the upcoming month.
- iv. Financial status including expenditures to date relative to projected burn line and estimated burn to completion

2. Task 2 - Discovery

Using methodology of their choice, the vendor shall initiate a discovery phase to capture current and desired landing page performance, validate the needs for the resultant web channel strategy, and analyze current USO.org website to determine optimal deployment architecture and approach.

Task 2 for this project may include:

- 2.1 Subtask 2.1 Requirements analysis. The vendor shall conduct requirements capture and ideation sessions to determine the desired capabilities and conversion outcomes. The results of this phase will include user experience funnels, process flows and a backlog of requirements for implementation. The vendor shall gain USO validation and sign off on desired requirements prior to implementation.



Sample Requirements (Not Comprehensive)

1. Page management includes such functionality as the ability to:
 - a. Globally change copy on all or a subset of landing pages in production
 - b. Adjust presented dollar handles (values) on contribution pages based on variables passed in the URL string
 - c. Dynamically populate products based on dollar values when presenting a "Wishbook" (symbolic gift) contribution page
 - d. Support page logic to present different dollar values for initial gift versus monthly giving upsell
 2. Transaction processing and user flow manipulation to include such functionality as:
 - a. Supporting integration of Apple Pay or Google Pay
 - b. Allowing for different "payment models" such as "pay the fee" (credit card transaction fee) or covering shipping costs for premiums
 - c. Presenting one click donate options
 - d. Presenting upsells over "payment processing" pages to drive upsell clickthrough
 3. Data handling and management to include such functionality as:
 - a. Passing metadata to USO systems for all transactions, including those that are declined or if a refund is issued
 - b. Managing donor "subscriptions" (sustainer payments) to allow for upselling recurring donation amount without USO staff intervention
- 2.2 Subtask 2.2 Web Donation Landing Page and Channel Recommendations. The vendor shall identify the gaps in functionality between the current instances and the desired capabilities identified during requirements analysis and make recommendations of the optimal web channel donation strategy and system to include benefits, challenges, timeline, and costs of the strategy or other options as recommended. Web channel strategy recommendations will be evaluated based on the estimated achievement of:
- i. **Conversion Performance**
 - i. Superior conversion rate as compared to the existing forms. The specific metrics will vary by landing page type.
 - i. Lead Generation: email sign-ups and first-time gift
 - ii. Donation Form: Donation and upsell (second gift or sustainer)
 - ii. The ability to configure tracking metrics per page without code development
 - ii. **Ease of Use and Integration with the USO Technical Universe**
 - i. Mobile first design to align with the device preference of our users
 - ii. Fully manageable by USO staff or agencies, allowing for page creation via a repeatable "templated" process. Should not require intervention of implementation partner to deploy, manage or retire pages in the future.
 - iii. Pages must be designed to comply with the USO's design pattern library and brand guidelines.
 - iv. Navigating between landing pages and USO web properties should provide a consistent "look and feel"



- v. Must support use of source codes to provide attribution
- vi. Will support placement of tags (e.g. Google Tag, Google Analytics, ...), pixels (e.g. Facebook, Twitter, ...), custom JavaScript and HTML code on all associated pages in the user journey to support multivariate testing, heatmapping and passing variables to the data layer for third party tools.
- vii. Support multiple user flows based on the form type and USO business requirements

2.3 Subtask 2.3 Security Controls and Technical Recommendations. The vendor shall identify the baseline requirements and gaps in technology between the current instances and the desired security and technical capabilities identified during requirements analysis and make recommendations. Security and Technical recommendations will be evaluated based on the estimated achievement of:

i. Integration

- i. Must integrate to Stripe's USO account for payment processing
 - i. Must support passing of USO standard tracking metadata with each payment transaction, as defined by the USO's Stripe Implementation Guidelines, to allow for downstream data correlation
 - ii. Must be possible to configure the sequence of calls to Stripe API to create data records as defined by USO workflows. For example, one-time donations are represented in Stripe as an individual Transaction while upsells are represented as an individual Transaction plus a Subscription
 - iii. Must use Stripe's tokenization approach to process payments
- ii. Should support of additional payment gateways, including digital wallets
- iii. Should have secure API layer with access control to enable integration with other systems and data extraction for analytics
 - i. Including extraction of data from interactions that don't result in a donation payment

ii. Security and Compliance

- i. Must use TLS 1.2 protocol for secure communication and maintain the most current protocol for the duration of the contract.
- ii. Must include role-based security with ability to assign access to functionality as well as read, write and delete permissions separately
- iii. Should target a preferred PCI Compliance Level of SAQ A-EP
 - i. No credit card or other payment information stored locally, passed through any back-end servers, or retained for any period. This includes storage in hard devices as well as in-memory
 - ii. Must provide PCI compliance attestation documentation no less than annually that includes a clear statement of what was considered "In Scope" for the attestation
 - iii. Must provide permission for external and, if VPN exists, internal ASV scan and penetration test conducted by the USO
 - iv. Must provide statement on how PCI Requirement 6.6 (protection of public-facing web applications) is handled.



Specifically, in the areas of code review, code security scans, and web application firewalls setup

- iv. Must provide spam control mechanisms in front-end and back-end to fight against card runners and bots
 - v. Must capture security records for auditing of actions performed through the service
 - vi. Should support SSO to integrate authentication with Azure Active Directory
 - vii. Should support 2-factor authentication with ability for Admins to enforce it on other users
 - viii. Regular upgrades to maintain good levels of security (libraries, frameworks, etc.)
- iii. Service Availability and Support**
- i. System Availability of 99.999% with a clear definition of how it's achieved and maintained. This is especially critical in Q4.
 - i. Provide 24/7 Support capabilities with specified SLAs, contact channels and critical issue escalation defined
 - ii. Consistent performance and response times for donors in different geographies
 - iii. Robust help documentation. It must be maintained and stay current as system evolves
 - iv. Training and business consulting services as needed by client
 - v. Service must be able to seamlessly scale as donor base and usage grows
 - vi. Robust quality control, development and security processes that guarantee uptime, good user experience and clean integrations
 - i. Should use USO owned accounts and services for source control, requirements tracking and documentation, hosting, monitoring, etc.

3. Task 3- Implementation

Using methodology of their choice, the vendor shall design, test, implement and deploy their recommendations, meeting all the agreed upon requirements determined and validated during discovery.

Task 3 for this project shall include the following subtasks.

- 3.1 Subtask 3.1 Enablement and Configuration. The vendor shall either create a new or utilize an existing sandbox to configure the solution based on the approved user stories captured during the discovery phase and approved by the USO.
- 3.2 Subtask 3.2 Test and Validation. The vendor shall compose User Acceptance Test (UAT) test scripts, conduct UAT events validating the accepted requirements and assist USO in the conduct of joint user acceptance testing. The UAT will confirm end to end functionality including any integration designed with the resultant system.

4. Task 4 – Change Management

The vendor shall provide sufficient knowledge transfer and change management support to facilitate the successful adoption, utilization of full capabilities and successful maintenance of the deployed system.



Task 4 for this project will include the following subtasks.

- 4.1 Subtask 4.1- Change management strategy and communications. The vendor shall provide a change management strategy that includes an impact assessment of all impacted stakeholder groups, steps to address change readiness and user adoption, stakeholder readiness assessment, and communications plan including draft communications materials to accomplish sufficient awareness to ensure adoption and full utilization of the deployed system. The strategy will include all USO stakeholders impacted by the system as well as projected impact on external stakeholders.
- 4.2 Subtask 4.2- User training. The vendor shall prepare and deliver user training materials and conduct initial delivery of the user training. The training materials will describe all user capabilities and be delivered in a format that can be updated with subsequent system changes. In addition, the training will be delivered in a format that will support retraining with employee turnover. The training shall include but not limited to Quick Reference Guides, training sessions recorded in .mp4 format and other training artifacts as proposed. The combined artifacts will describe the end to end functionality of the system including reports and dashboards.
- 4.3 Subtask 4.3- System administrator training- The vendor shall provide 1:1 system administrator training which reviews the specifics of the solution architecture and any integration built in the deployed system.

Key Deliverables

The Vendor shall provide the following deliverables according to the tentative time frames identified in the tables below. Final time frames will be negotiated post-award between the Vendor and the USO.



SOW and/or Task Specific Deliverables	Timing
1. Task 1.1 - Project kickoff meeting - Slides including but not limited to the elements listed in task 1.1	Within 3 working days of contract award
2. Task 1.1 - Project Plan as described in task 1.1.iii	Within 3 working days of contract award to be approved within 5 working days of receipt.
3. Task 1.1 - Kick off meeting – Meeting minutes	Within 3 working days of completion of kickoff meeting
4. Task 1.2 - Weekly reports- including but not limited to the elements listed in task 1.2	No later than 12:00 PM EST on Monday of each week, reporting for the prior week
5. Task 1.3 - Monthly reports- including but not limited to the elements listed in task 1.3	Within 3 business days of the first of each month.
6. Task 2.1- User stories, donor experience/flow diagrams, and implementation backlog	Upon completion of discovery phase, updates prior to implementation start
7. Task 3.2 - User Acceptance Test Scripts, test result and remediation result summary	As proposed and approved in the project plan
8. Task 4.1 - Change Management Strategy as described in task 4.1	As proposed and approved in the project plan
9. Task 4.3 - Systems administrator training as described in task 4.3	As proposed and approved in the project plan
10. Task 3 - Implemented technology solution that supports the creation and deployment of landing pages (both acquisition and contribution)	As proposed and approved in the project plan
11. Task 3 - Onboarding training, complete with written documentation	As proposed and approved in the project plan



Period of Performance

The period of performance for the project will be as negotiated by the winning bidder.

Other Requirements

Furnishing of Equipment/Property

The Vendor shall furnish its own office, equipment, personnel, and technology.

Place of Performance

With the exception of travel and/or specific requirements as outlined in the RFP that relate to the Scope of Work and/or Tasks and Deliverables, the Vendor is required to provide the facilities necessary to execute the SOW. The Vendor shall choose its staff or acquire the necessary personnel support and provide suitable work facilities.

Hours of Service

The Vendor shall be available Monday through Friday, between 8:30 am and 5:30 pm (ET). USO has regular observance of federal holidays: New Year's Day; Birthday of Martin Luther King, Jr.; Washington's Birthday; Memorial Day; Independence Day; Labor Day; Veterans Day; Thanksgiving Day; Day after Thanksgiving Day and Christmas Day.

Insurance

The Vendor, at its own expense, shall provide and maintain the general liability insurance in support of an awarded contract for the entire duration, including option years, with \$1 million minimum coverage and up to \$3 million or at a level required and relevant to the project requirements. The Vendor assumes absolute responsibility and liability for any and all personal injuries or death and/or property damage or losses suffered due to negligence of the Vendor's personnel in the performance of the services required under this contract.

Non-Disclosure Agreement

The Vendor shall not release any sensitive, confidential, or proprietary information without prior written approval from the USO. At the time of contract award, the Vendor may be required to sign a Non-Disclosure Agreement (NDA), and at each subsequent option year, if applicable and exercised.

Organizational Conflict of Interest

The Vendor agrees to disclose any conflicts of interest on the part of Vendor that has the potential to bias or has the appearance of biasing its obligations under this RFP. Vendor warrants that there is no undisclosed conflict of interest in Vendor's other contracts or agreements or other employment or in the operation of Vendor's business with the proposed services to be performed under this RFP.



Compliance

Upon the request of employees or other persons with disabilities participating in official business, the Vendor must arrange necessary and reasonable accommodations for the impaired individual(s) per Section 508 of the Rehabilitation Act of 1973, as amended (29 U.S.C. § 794 (d)).



PROPOSAL EVALUATION CRITERIA

Overview

The USO will evaluate proposals in compliance with the Scope of Work and requirements stated in this RFP. An award will be made to the Vendor who proposes the best value, with the technical solution being most important. The USO will consider the evaluation factors indicated below. See Submission Guidelines (below) for a description of the categories.

The USO reserves the right to reject proposals that are unreasonably low or high in price. The price will be determined with regard to the fulfillment of the requirements listed in the Scope of Work.

Category	Weight of Rating Factor
Technical Solution	40%
Management Approach	10%
Past Performance	30%
Cost	20%

USO will assign the following evaluation scores:

- **Outstanding** – The Vendor has demonstrated that there is a high probability of success in a combination of past results, low risk, and professional distribution of services.
- **Good** – The Vendor has demonstrated that there is a good probability of success in a combination of past results, moderate risk, and professional distribution of services.
- **Fair** – The Vendor has demonstrated that there is marginal probability of success in a combination of past results, marginal risk, and professional distribution of services.
- **Poor** – The Vendor has not demonstrated that there is a reasonable probability of success in this services-based effort.



SUBMISSION GUIDELINES

Submissions should be organized into two separate volumes, sent as separate files. Volume I shall be a Technical Approach describing the knowledge, experience and capabilities that the Vendor possesses in order to successfully plan, prioritize and manage the tasks included in the Scope of Work. Volume II shall be the cost proposal for execution of the Technical Approach.

All text should be Arial or Times New Roman font, no less than 11 point with one-inch margins and single spaced. Graphics and tables may be included. We accept MS Word, MS Excel, or Adobe PDF formats.

To ensure completeness, please refer to the Vendor Checklist (Appendix B).

Each submission must include a cover letter with following information:

- Vendor's name and mailing address
- Reference to the solicitation Documentation Reference (USO-D&M-LNDPGS2019)
- Technical and Contract points of contact (name, phone number, and e-mail address)
- Business size (large, small, state/federal certifications—MBE, 8(a), HUBZone, etc.)
- Dunn & Bradstreet Number (DUNS)
- Federal Tax ID (EIN, TIN, SS)
- Affirmation that the quote is valid for at least 30 days
- A statement specifying the extent of agreement with all terms, conditions, and provisions included in the solicitation and agreement to furnish any or all items upon which prices are offered at the price set opposite each item
- Acknowledgement of any amendments by reference

Questions must be submitted to procurement@uso.org, referencing Document Reference USO-D&M-LNDPGS2019 in the subject line, no later than 5:00 P.M. (ET) on July 23, 2019.

Volume I: Technical Approach

Describe the plan to provide, prioritize, and manage the tasks included in the Scope of Work. Include the knowledge, experience, and capabilities related to provision of the range of support needs described.

1. Statement of Understanding

State a clear understanding of the mission of the USO, the Entertainment department and this project.

2. Technical Solution and Implementation Approach

Describe your proposed approach to each of the requirements included in tasks 2 through 4 of the Scope of Work.



3. Management Approach

Describe a plan to manage the operation to ensure successful program support, including program management, financial controls, quality assurance, internal controls, and staffing.

3.1. Management Plan

- Describe the overall plan for organizing, staffing, and managing the tasks required by the SOW in accordance with task 1. Indicate how roles and responsibilities will be divided, decisions made, work monitored, and quality and timeliness assured.
- Explain how this management and staffing plan will enable the Vendor to start projects quickly, conduct multiple projects concurrently, complete complex tasks within narrow time periods, and assure quality of products

3.2. Proposed Project Team Members/Key Personnel

- List proposed project team staff, sub-vendors, and consultants. Identify key personnel to include but not limited to the Project Manager (PM), the Solution Architect (SA)/ Technical Architect (TA). For key personnel, state of level of effort.
- Provide qualifications for all proposed team members. Include proposed job title and a brief description of qualifications, including education and experience with Salesforce implementation projects.
- Describe how the individual expertise of each proposed team member and the combined, complementary expertise of the project team are appropriate for supporting each of the requirement sections of the RFP.

3.3. Subcontracting plans

- If the proposal includes sub-vendors, we encourage large businesses to meet federal small business, labor surplus area, and minority business requirements.

4. Past Performance

It is essential that the Vendor demonstrate the previous experience required to design and conduct the various activities described in the Scope of Work. Of particular interest is experience in responding to similar requests from other clients or customers for implementation of web donor landing pages with similar requirements.

- For the Vendor and each proposed major sub-vendor, identify up to three existing projects or projects completed within the last five years that are consistent in scope, nature, and effort for commercial customers, Non-Profit clients, or local, state, or federal governments.
- Provide the information requested in Appendix A.
- For each selected project, provide a synopsis of work performed Provide information on problems encountered on the contracts and subcontracts and corrective actions taken to resolve those problems.



Volume II: Cost Proposal

Volume II: Cost Proposal should be distinct and separate from Volume I: Technical Proposal. If needed, a brief budget narrative (no more than two pages) may be included to clarify unusual budget items or calculations.

Provide the total cost of the vendor bid with a breakout of projected cost by Vendor bid phase with hours, roles and bid rates for all proposed personnel.

Provide all assumptions used in the preparation of the submitted budget and with dependencies on USO personnel.

Submission Deadline

All proposals should be sent no later than 5 pm (ET) on August 2, 2019 to procurement@uso.org with Document Reference USO-D&M-LNDPGS2019 in the subject line.

Oral Presentation

Vendor Proposal Down-Select

Using the evaluation factors and scoring stated within Proposal Evaluation Criteria of this RFP, the USO will down-select the submitted vendor proposals for the opportunity to provide an oral presentation.

The expected notification date for down-select is August 9, 2019.

Presentation Guidelines

The vendor shall conduct an Oral Presentation of their proposed plan to provide, prioritize, and manage the tasks included in the Scope of Work. The presentation shall be delivered either in Adobe PDF format or compatible with Microsoft PowerPoint 2016. The presentation shall be designed such that it can be presented in an office location with the availability of public WIFI. No new information, examples or changes to the technical approach may be introduced with the oral presentation. Cost should not be discussed during this presentation.

The total duration of the presentation will be total of 60 minutes, starting when the lead presenter indicates readiness to proceed. At the end of 60 minutes of elapsed time the presentation will be terminated. Any slides not covered during the 60-minute period will not be evaluated, and information covered on those slides will be omitted from the proposal.

The Vendor may only present the slides that have been previously submitted at the submission deadline date. Modifications to slides after the deadline will not be accepted. The slides will be loaded and ready to present using USO provided equipment. If desired, the vendor may project using Vendor provided equipment that is equipped with HDMI or display port connection, provided they notify USO in advance of their intention. Additionally, remote presentation via video conferencing is permissible if the USO is notified in advance.



Following the 60-minute presentation period the vendor team will be escorted to an adjacent location for a 10-minute caucus. After the 10-minute caucus period the vendor team will be invited back into the briefing room for a 20-minute question and answer session with the evaluation team. Any questions posed to the vendor team must be answered by the members from the bidder delivery team present at the orals presentation. The bidder team may caucus if desired to address any questions from the evaluation team.

It is desirable for the presenters to be primarily composed of the bid delivery team key personnel. At a minimum, the bid Solutions Architect or Technical Architect, Project Manager, and Change Management lead must present the sections of the presentation that apply to their area of delivery. In addition, other proposed participants or leads of any bid project phase are also encouraged to present. A short introduction or overview by corporate staff other than the delivery team is permissible, however vendor teams that include excessive participation by non-delivery personnel members will be penalized. Every presenter shall introduce themselves by their title and position on the proposed delivery team.

Although not required, it is desirable for the presenters to be primarily composed of the bid delivery team key personnel. When introductions are made, the presenter (s) shall identify whether they will be involved with delivery post award, and if so in what role. Multiple presenters are acceptable. Every presenter shall introduce themselves by their title and position on the proposed delivery team.

Presentation Submission Deadline

All presentations should be sent no later than 5 pm (ET) on August 23, 2019 to procurement@uso.org with Document Reference USO-D&M-LNDPGS2019 in the subject line.



POST-SUBMISSION INFORMATION

Withdrawal or Modification of Proposals

A Vendor may modify or withdraw its proposal upon written, electronic, or facsimile notice if received at the location designated in the solicitation for submission of proposals not later than the closing date and time for receipt of proposals.

Late Submissions

Late proposals, requests for modification, or requests for withdrawal shall not be considered, unless a late modification of a successful proposal makes terms more favorable for the USO.

Best and Final Offers

Subsequent to receiving the original proposals, USO reserves the right to notify all technically acceptable Vendors within the competitive range and to provide them an opportunity to submit written best and final offers (BAFOs) at the designated date and time.

BAFOs shall be subject to the late submissions, late modifications, and late withdrawals of proposals provision of this RFP. After receipt of a BAFO, no discussions shall be reopened unless the USO determines that it is in the USO's best interest to do so (e.g., that information available at that time is inadequate to reasonably justify Vendor selection and award based on the BAFOs received). If discussions are reopened, the USO shall issue an additional request for BAFOs to all technically acceptable Vendors still within the competitive range.

At its discretion, the USO reserves the right to also invite Vendors who are technically acceptable to make a presentation to the USO on the proposed effort for technical and management approaches identified in the submission. The USO will notify Vendors who meet the qualifications and provide the date, time, and format for the presentation.

This RFP does not commit the USO to engage in any business transactions or enter into any contractual obligations with Vendors.

Retention of Proposals

All proposal documents shall be the property of the USO, retained by the USO, and not returned to the Vendors.



Post-Award Information

Anticipated Award Date

The anticipated notice of award date is September 6, 2019.

Post-Award Conference/Kickoff Meeting

Upon notice of award, the USO will coordinate an award kickoff meeting within 15 days with the Vendor. Date, time, and location will be provided at the time of the award.

Notice to Proceed

Immediately upon receipt of notice of award, the Vendor shall take all necessary steps to prepare for performance of the services required hereunder. The Vendor shall have a maximum of 10 calendar days to complete these steps.

Following receipt from the Vendor of acceptable evidence that the Vendor has obtained all required licenses, permits, and insurance and is otherwise prepared to commence providing the services, the USO shall issue a Notice to Proceed.

On the date established in the Notice to Proceed (this notice will allow a minimum of seven calendar days from the date of the Notice to Proceed, unless the Vendor agrees to an earlier date), the Vendor shall start work.

Period of Performance

The performance period of this contract is from the start date established in the Notice to Proceed and continuing for a one-time project-based effort. The initial period of performance includes any transition period authorized under the contract.

Documentation Requirements

The Vendor may be required to provide documentation to support its legal ability to operate facilities in the United States.

Basis of Compensation to the Vendor

The USO expects to award a time and materials contract for the SOW and budget that is proposed; negotiated with the USO during the contract award or the Best and Final Offer process; and listed in the agreement executed between the organizations. Any Vendor quality issues that result in the re-drafting of work or increased labor required to meet deliverables during the performance of the contract are the financial responsibility of the Vendor, and re-work will be done at the Vendor's expense.



Billing and Payment Procedures

The USO currently utilizes electronic invoicing. Invoices shall be provided to the USO on a monthly basis to the email address below, with the Purchase Order number included in the subject line of the email and on the invoice.

Billing address:

USO

invoices@uso.coupahost.com

2111 Wilson Blvd, Suite 1200

Arlington, VA 22201

Debrief – Post-award

The Vendor(s) not selected may receive a post-award debriefing provided a **written** request is submitted to procurement@uso.org **within three calendar days from the Notice of an Award**. At the USO's sole discretion, the debriefing will be provided in writing or verbally.

Protests/Appeals

USO is not a government agency and therefore, USO's procurement decisions, including awards and decisions not to award, resulting from requests for procurement, requests for quotes, requests for information, or other procurement processes, are made in USO's sole discretion and are not subject to protest or right of appeal.



Appendix A: Past Performance Chart

Vendor shall submit the following information as part of the proposal for both the Vendor and proposed major subvendors. A list of three contracts completed during the past five years, or currently in process, Contracts listed may include those entered into by the federal government, agencies of state and local governments, and commercial clients. Include the following information for each contract and subcontract:

	Contract 1	Contract 2	Contract 3
Name of contract			
Name of client or customer			
Contract type			
Dates of performance			
Total contract value			
Program manager and telephone number			
Contracting officer and telephone number			
Administrative contracting officer, if different from contracting officer, and telephone number			
List of major subcontracts			



Appendix B: Submission Checklist

Cover Letter		Length
<input type="checkbox"/>	Cover Letter	As needed
Volume I: Technical Proposal		Length
<input type="checkbox"/>	Statement of Understanding	25 pages maximum
<input type="checkbox"/>	Technical Solution	
<input type="checkbox"/>	Management Approach	
<input type="checkbox"/>	Past Performance	
<input type="checkbox"/>	Appendix A: Resumes of Key Personnel	2 pages per resume maximum
<input type="checkbox"/>	Appendix B: Past Performance Table	As needed
Volume II: Cost Proposal		Length
<input type="checkbox"/>	Budget	As needed
<input type="checkbox"/>	Budget Narrative (Optional)	2 pages maximum