



USO Planned Giving

REQUEST FOR PROPOSAL

Document Reference USO-PlannedGiving2021

October 14, 2021

KEY DATES	
Request for Proposal Online Posting	October 14, 2021
Request for Proposal Released	October 25, 2021
Deadline for Questions	November 8, 2021
Q&A Shared with all Vendors	November 15, 2021
Deadline for Proposals	December 6, 2021
Projected Award Date	December 20, 2021
Projected Start Date	January 1, 2022

After reviewing this document, if you wish to participate in the RFP, please download and complete the [RFP Vendor Participation Request Form](#) prior to the Release date. Once the RFP has been released we can no longer accept new vendors to participate.

**Please note you must download this file and open with Adobe. It will not function properly if opened in your web browser*



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®. Since 1941, the USO — a private, nonprofit organization — has served the men and women of the U.S. military, and their families, throughout their time in uniform – 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 a congressionally chartered organization and works in close partnership with the Department of Defense (DoD), 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.

The USO remains dedicated to expanding access to USO centers and programs around the world, increasing annual service connections and boosting 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.

USO meets all 20 Better Business Bureau Standards for Charity Accountability and is a gold-level GuideStar Exchange participant, demonstrating its commitment to transparency.

For more information, visit www.uso.org/about

United Service Organizations
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Arlington, Virginia 22201



PROJECT SUMMARY

Developing a targeted planned giving program is a priority for the organization. The goal is to consistently grow 1941 Legacy Society membership and triple annual bequest revenue over the next five years. The transition from a federated structure to a single corporation (“One USO”) provides an opportunity for growth in all facets of planned giving. We want to develop a marketing plan/strategy that will resonate with key constituents, identify new gifts and provide meaningful stewardship of donors at the national and local level. Although planned giving should be available to all constituents, the focus should be on the silent generation and baby boomers that make up a large segment of the donor file. A systematic marketing effort with consistent branding and messaging will be a big key to success.

PURPOSE

The USO expects to make one award under this RFP. The period of performance is from **January 1, 2022 to December 31, 2022**. The anticipated contract award date is approximately **December 20, 2021**.

This will be a **Time and Materials contract**. All labor will be delivered through a **Time and Materials Contract**. Any related travel expenses required to support the contract if encountered in the course of this contract will be billable on a cost reimbursable basis with no fee. The Vendor will operate at the direction of and receive guidance from the USO.

Funding for the attached SOW will be between \$225,000 and \$300,000. The USO reserves the right to make no award or to cancel this RFP.

Submission Deadline

All proposals must be submitted no later than 5 pm (ET) on **December 6, 2021** through Coupa Sourcing.

The USO reserves the right to make no award or to cancel this RFP at any time.

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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 pm (ET) on December 6, 2021.



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BACKGROUND

Developing a targeted planned giving program is a priority for the organization. The goal is to consistently grow 1941 Legacy Society membership and triple annual bequest revenue over the next five years. The transition from a federated structure to a single corporation (“One USO”) provides an opportunity for growth in all facets of planned giving. We want to develop a marketing plan/strategy that will resonate with key constituents, identify new gifts and provide meaningful stewardship of donors at the national and local level. Although planned giving should be available to all constituents, the focus should be on the silent generation and baby boomers that make up a large segment of the donor file. A systematic marketing effort with consistent branding and messaging will be a big key to success.



PROJECT REQUIREMENTS

Scope of Work (SOW)

The Vendor selected will be responsible for performing all tasks and subtasks listed below, as well as additional tasks to be assigned, and mutually agreed upon deliverable dates. Vendor will hold monthly meetings with planned giving staff to review activities listed below, and adjust marketing plan as warranted.

Tasks and Subtasks

1. Task 1 - Develop and host planned giving webpage with reporting analytics

The Vendor will design and host a planned giving webpage that is user friendly, compatible with mobile devices, and conform to USO (United Service Organizations) branding. The page should have a custom URL (Universal Record Locator) and be easy to navigate. Content should be relevant, timely and easily understood by prospective donors and professional advisors. The page should also contain customized content for 1941 Legacy Society, including donor names and list of membership benefits. The page should be mission focused, educational, and present a compelling message for supporting the USO through planned giving. Vendor will give access to USO or provide staff support to edit webpage content as needed.

2. Task 2 - Create customized planned giving materials

The Vendor will design and produce customized brochures, booklets, display ads other collateral material in print ready and electronic format. Brochure and booklet topics should include general estate planning, retirement plan assets, stock/securities, charitable remainder trusts, charitable gift annuities and other topics as warranted according to marketing strategies. Material should be customized according to USO branding and created in such a way to allow for local customization across organization regions.

3. Task 3 – Planned giving promotional plan

The vendor will work with a staff team to draft and implement a planned giving marketing plan with bi-monthly or quarterly activities. Tactics should be designed to educate and motivate prospective donors, identify/secure new gifts and grow bequest revenue over time. Subtask to include:

Task 3 for this project may include:

- Subtask 3.1 in support of Task 3: 4 print mailings to direct mail donors (approx. 40,000 to 60,000 donors per mailing) focusing on will planning, retirement plan assets, charitable gift annuities and charitable remainder trusts. Each mailing should include breakdown of all costs including design, set-up, printing, mailing & reply envelopes, postage, brochures or booklets, staff time etc. Brochures and/or booklets should be available in electronic and pre-printed formats.
- Subtask 3.2 in support of Task 3: 4 email campaigns strategies designed as precursors or follow-up to print mailings. All costs should be broken down. All costs (same quantities as print mailings).
- Subtask 3.3 in support of Task 3: 1 print campaign to educate board members about planned giving, define their role, outline the importance of their participation, and highlight ways they can set up planned gifts and declare membership in the 1941 Legacy Society.
- Subtask 3.4 in support of Task 3: Design 6 buck slips or insert cards that can be placed and tested in bi-monthly direct mail campaigns. Topics should include wills, estate planning, gifts that provide income and tax benefits, gifts of retirement plan assets, 1941 Legacy Society and gifts of securities.



- Subtask 3.5 in support of Task 3: Design 6 planned giving pop-up ads with active link to USO planned giving page and/or electronic brochure/booklet.
- Subtask 3.6 in support of Task 3: 2 donor surveys (electronic or print) structured to get planned giving prospects to self-identify. Costs should include all related expenses.

Vendor will work with appropriate staff to analyze donor file to determine appropriate audience to target, topic of promotion marketing piece and format (electronic and/or print) to be used. Vendor will establish metrics and goals to evaluate short and long-term success of each promotional effort. Results should be tracked and reported monthly with a printed executive summary of activity and results delivered at year end.

4. Task 4 – Legal & Tax Expertise

- Vendor will provide technical support on legal and tax ramifications of complex gift planning issues when and if they arise.

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 Develop and host planned giving webpage analytics	January 15, 2022
2. Task 2 Create customized planned giving materials	February 1, 2022 (1 st batch) and ongoing as needed
3. Task 3 Planned giving promotional plan	January 31, 2022

Technical Proposal

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

Statement of Understanding

- State a clear understanding of the mission of the USO and this project.
- Maximum length: 2 pages

Technical Solution

- Describe your proposed approach to each requirement included in the Scope of Work.
- Maximum length: 4 pages not including graphs, graphics, charts, etc.



Management Approach

Describe a plan to manage the operation to ensure successful program support, including program management, financial resources or ability to obtain them, equipment and facilities, quality assurance, internal controls, and staffing.

Management Plan

- Describe the overall plan for organizing, staffing, and managing the tasks required by the SOW. 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
- Maximum length: 3 pages

Proposed Project Team Members

- List proposed project team staff, subcontractors, and consultants. Identify key personnel. For key personnel, state of level of effort.
- Provide resumes for all proposed team members. Include proposed job title and a brief description of qualifications, including education and experience. Resumes should be no longer than two pages.
- 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.
- Maximum length: 2 pages not including Resumes

Subcontracting plans

- If the proposal includes subcontractors, we encourage large businesses to meet federal small business, labor surplus area, and minority business requirements.
- If applicable, please provide a description of planned usage of subcontractors
- Maximum length: 1 page

Corporate Qualifications

The work described in this RFP must be performed on a 'time is of the essence' basis and meet exceptionally high-quality standards. It is essential that the Vendor demonstrate the technical and subject-matter expertise to design and conduct the activities described in the Scope of Work and to put qualified staff in place to begin work rapidly. The Vendor must also have the ability to organize and manage resources and personnel effectively.

- Describe projects that are currently being managed.



- Provide a discussion of directly relevant technical and substantive experience, including a list of prior, similar projects.
- Maximum length: 2 pages

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 the Vendor and each proposed major subcontractor, 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.
- Complete table in Appendix A.
- For each selected project, submit a synopsis of work performed (no longer than two pages). Provide information on problems encountered on the contracts and subcontracts and corrective actions taken to resolve those problems. Do not provide general information on performance on the contracts because we will obtain that information from the references.
- Maximum length: 3 pages

Cost Proposal

1. Quote for Services

1.1 Provide a quote in table form that supports the entire Scope of Work, including all expected expenditures and fees. The quote should list key services with corresponding prices. Quotes may be broken out by tasks / subtasks, or by key personnel. Vendors may break out costs by each task/heading within the project, or by key personnel working on the project with expected hours per month. Travel will be reimbursed, at cost, according to USO travel guidelines (based on federal travel regulations).

Sample templates for labor category and rates:



Pricing by Task

Note: Under "Task," please list each task or service from the Scope of Work or group of tasks combined into a project phase. You may add as many rows as necessary.

Task	Due Date	Type of Service/Activity	Rates (broken out by key personnel)	Hours	Direct Cost	Indirect Cost	Total Cost
Task #1							
Task #2							
Task	Due Date	Type of Service/Activity	Rates (broken out by key personnel)	Hours	Direct Cost	Indirect Cost	Total Cost
Task #3							
Subtask #1							
Subtask #2							
Subtask #3							
Subtask #4							
Subtask #5							
Subtask #6							
Task #4							



TERMS AND CONDITIONS

Period of Performance

The period of performance is from **January 1, 2022 to December 31, 2022.**

Coupa Sourcing Management Software

This RFP will be hosted using Coupa Sourcing Management Software. The Vendor is required to use Coupa Sourcing for all communication and submissions related to this RFP. The USO will provide the Vendor with all necessary tools to access the Coupa Sourcing Management Software.

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; June Nineteenth, 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.

The price will be determined with regard to the fulfillment of the requirements listed in the Scope of Work. In Coupa Sourcing, the Scope of Work is split out under forms: 1.) Technical Solution 2.) Management Solution 3.) Corporate Qualifications 4.) Past Performance

Category	Weight of Rating Factor
Technical Solution	35%
Management Approach	35%
Past Performance	10%
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

The USO utilizes **Coupa Sourcing** for all Vendor Bidding

Acceptance of Coupa Sourcing Event

- Click on the link provided in the email invite from Coupa Sourcing
- Download **Vendor Step by Step Guide**
- Download and review **Terms & Conditions**

Format

- 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 PowerPoint, MS Word, MS Excel, or Adobe PDF formats.

Attachments

- Download **Coupa Sourcing Guide for Bidding**
- Download **Supporting Documentation** (If applicable)
- Download **Cover Letter** Guide
- Upload completed **Cover Letter**

Forms

- **Download** Scope of Work Form in Coupa Sourcing and **Upload** responses utilizing a PowerPoint presentation format for all responses.
 - Statement of Understanding
 - Technical Task 1
 - Technical Task 2
 - Technical Task 3
 - Technical Task 4
 - Management Task 1: Approach
 - Management Task 2: Plan
 - Management Task 3: Project Team Members
 - Management Task 4: Subcontracting Plans
 - Corporate Qualifications
 - Past Performance
 - Cost Proposal

Cost (Items & Lots)

- **Enter Total Cost of Your Proposal**



Post-Submission Information

Vendor Proposal Down Select

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

Withdrawal or Modification of Proposals

A Vendor may modify or withdraw its proposal on or before December 6, 2021. This is done through Coupa Sourcing.

Late Submissions

Late proposals, requests for modification, or requests for withdrawal shall not be considered.

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. This will be done through Coupa Sourcing "Messaging" tool.

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 **December 20, 2021**.

Post-Award Conference/Kickoff Meeting

Upon notice of award, the USO will coordinate an award kickoff meeting within 7 days with the Vendor. The 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, **lasting 12 months ending on December 31, 2022**. 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 by submission to “Coupa Supplier Portal”. Instructions on accessing the portal will be provided post-award.

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 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 subcontractors. 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			