



## Acknowledgement & Welcome Series

REQUEST FOR PROPOSAL

Document Reference USO-ACKNWLCM2024

March 28, 2024

KEY DATES	
RFP Posted	March 28, 2024
Request for Proposal Released	April 3, 2024
Deadline for Questions	April 10, 2024
Projected Questions & Answers Response	April 15, 2024
Deadline for Proposals	April 25, 2024
Downselect Notification (If needed)	April 30, 2024
Projected Award Date	May 15, 2024
Projected Start Date	June 1, 2024

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 the request file and open with Adobe. It will not function properly if opened in your web browser.



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## **About The USO**

For the people who serve.

The USO is the leading nonprofit organization dedicated to the well-being of all people serving in the United States military and their families. Since 1941, the USO has been by the side of service members throughout their military service. Impactful programs and services are provided through our 250+ locations around the world, a robust care package delivery program, live and virtual entertainment events, military spouse and youth programming, and much more.

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. The USO relies on the financial generosity of individuals, organizations, and corporations to support our mission delivery activities, and this mission delivery is powered by a large, dedicated volunteer corps.

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](http://www.uso.org/about)*



## **Project Summary**

Successful and timely acknowledgement of gift receipting is an important part of building and maintaining donor loyalty which support our growth goals. The USO is seeking an Agency partner to perform the following services for its acknowledgement and welcome series:

- Provide high quality and excellent customer service to work with USO on timely execution of these two programs.
- Print, personalize and distribute twice weekly donor acknowledgements.
- Produce ongoing a four-part welcome series to onboard new donors to the USO.
- Store material inventory storage.
- Annual volume in FY2023 = 950,000 records

The successful bidder will be able to help the USO achieve its 10-year plan to achieve \$76 million in gross revenues while focused on successfully positioning the USO to donors as an urgent and worthy mission in a very competitive philanthropic marketplace.

The USO expects to make one award under this RFP. The period of performance is **June 1, 2024 – May 31, 2026**.

The anticipated contract award date is approximately **May 15, 2024**

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 during 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.

Anticipated funding for this project will be approximately **\$250,000.00**

**THE USO RESERVES THE RIGHT TO MAKE NO AWARD OR TO CANCEL THE RFP.**

## **Submission Deadline**

All proposals must be submitted no later than **5 pm (ET) on April 25, 2024**.



## **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.

For the Q&A period, each bidding vendor may submit questions via the messages tool in the Coupa Sourcing Portal. The answers will be shared with all vendors participating in the RFP.

### **Tasks and Subtasks**

#### **Acknowledgement program:**

**Task 1: Produce versioned acknowledgement packages twice weekly. Include pricing should we determine we want to distribute acknowledgements three times a week.**

- a. Receive files twice weekly from USO's data vendor.
- b. Prep file with data hygiene and postal processing.
- c. Provide print, laser personalization, lettershop, bindery & mail services.
- d. Send barcode proofs to Cager provider for approval
- e. Send laser set ups to USO for approval

Current schedule:

- Friday Ack -> mails Wednesday
- Tuesday Ack -> mails Saturday

**Task 2: Provide suggestions to improve efficiency.**

**Task 3: Provide counts and postal 3602s to USO for reconciliation purposes at the close of each month.**

**Task 4: Store inventory as needed**

Package Specifications, Versioning:

Version 1: Donations less than \$100

- Monarch carrier with standard window, stamped 3rd class NP (with some 1st class packages)
- BRE coded ZBRE (and no stamping)
- 1-page 8.5"x11" Personalized Thank You letter
- 1-page 8.5"x11" Personalized Gift Acknowledgement statement with reply attached to bottom of page

Version 2: Donations greater than \$100

- #10 carrier with standard window, stamped 3rd class NP (with some 1st class packages)
- BRE coded ZBRE (and no stamping)
- 1-page 8.5"x11" Personalized Thank You letter
- 1-page 8.5"x11" Personalized Gift Acknowledgement statement with reply attached to bottom of page

Version 3: Donations of \$2,500+

- Package does not contain BRE and gift acknowledgement does not have a reply.
- High Value donors with \$2500+ gifts receive only (no BRE or Gift Acknowledgement/reply)
  - o 8 ½ x 11 personalized letter
  - o Closed face #10 OE



**Welcome Series**

**Task 1: Produce a four-part welcome series to all new USO donor records.**

- Receive files twice weekly from USO’s data vendor.
- Prep file with data hygiene and postal processing.
- Provide print, laser personalization, lettershop, bindery & mail services.
- Send barcode proofs to Cager provider for approval.
- Send laser set ups to USO for approval.

Schedule: Thursday Welcome Series (includes new donors from Friday and Tuesday pull) -> following Wednesday

**Task 2: Provide counts and postal 3602s to USO for reconciliation purposes at the close of each month.**

**Task 3: Store inventory as needed**

Letter 1: Therapy Dogs  
 #10 Window Envelope, 2/1 24# White Wove  
 7 x 14 Letter with Perf Remit, 4/1, 60# White Offset  
 #9 Closed Face BRE, 1/1, 24# White Wove

Letter 2: You and the USO  
 #10 Window Envelope, 2/1 24# White Wove  
 7 x 10.625 Letter, 4/0, 60# White offset  
 #9 Closed Face BRE, 1/1, 24# White Wove

Letter 3: Warrior Centers  
 #10 Window Envelope, 2/1 24# White Wove  
 7 x 14 Letter with Perf Remit, 4/1, 60# White Offset  
 #9 Closed Face BRE, 1/1, 24# White Wove

Letter 4: When Disaster Strikes  
 #10 Window Envelope, 2/1 24# White Wove  
 7 x 10.625 Letter, 4/0, 60# White offset  
 #9 Closed Face BRE, 1/1, 24# White Wove

**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. Acknowledgements: Provide Print, DP, Laser, Bindery and Mail twice weekly for USO’s donor transactions.	Bi-Weekly
2. Welcome Series: Provide Print, DP, Laser, Bindery and Mail as new USO’s donor transactions are provided	Weekly
3. Store inventory as necessary	Ongoing



## **Scope of Work Details**

### **Statement of Understanding**

- State a clear understanding of the mission of the USO and this project.

### **Technical Solution**

- Describe your proposed approach to each requirement included in the Scope of Work.

### **Management Approach & Plan**

- 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.
- Describe the 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.

### **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.

### **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.

### **Corporate Qualifications**

The work described in this RFP must be performed quickly 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.

### **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.
- 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.

**Cost Proposal**

Provide a quote in a rate card format. Add any recurring fee or set up fees as part of the rate card submission.

Feel free to add rows or columns to table below.

Program	QTY	Print Cost/m	Materials Cost/m	DP Cost/m	Lettershop Cost/m	Estimated Postage Cost/m	Total Cost
Acknowledgement	950,000						
Welcome Series #1							
Welcome Series #2							
Welcome Series #3							
Welcome Series #4							

- **Brief budget narrative** (no more than 2 pages) may be included to clarify unusual budget items or calculations.

**Terms & Conditions**

**Coupa Sourcing Management Software**

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

**Furnishing of Equipment/Property**

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

**Place of Performance**

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





**Hours of Service**

The Agency 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 Agency, 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 Agency assumes absolute responsibility and liability for all personal injuries or death and/or property damage or losses suffered due to negligence of the Agency's personnel in the performance of the services required under this contract.

**Non-Disclosure Agreement**

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

**Organizational Conflict of Interest**

The Agency agrees to disclose any conflicts of interest on the part of the Agency that has the potential to bias or has the appearance of biasing its obligations under this RFP. Agency warrants that there is no undisclosed conflict of interest in Agency’s other contracts or agreements or other employment or in the operation of the Agency’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 Agency 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)).

**Quote Evaluation Criteria**

The USO will evaluate proposals in compliance with the Scope of Work and requirements stated in this RFP. An award may be made to the Agency who proposes the best overall value for the USO as determined by USO in its sole discretion. 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 regarding the ability of the Agency to fulfill the requirements listed in the Scope of Work.

<b>Category</b>	<b>Weight of Rating Factor</b>
<b>Technical Solution</b>	35%
<b>Management/Strategic Approach</b>	20%
<b>Past Performance</b>	15%
<b>Cost</b>	30%



The USO will assign the following evaluation scores:

- **Outstanding** – The Agency 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 Agency has demonstrated that there is a good probability of success in a combination of past results, moderate risk, and professional distribution of services.
- **Satisfactory** – The Vendor has demonstrated that there is a moderate probability of success in a combination of past results, moderate risk, and professional distribution of services.
- **Fair** – The Agency has demonstrated that there is marginal probability of success in a combination of past results, marginal risk, and professional distribution of services.
- **Poor** – The Agency 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 **Coupa Sourcing Vendor Guide**
- Download and review **RFP Document including the Terms and Conditions**
- Questions should be submitted via the messages tool in the sourcing event.

#### **Attachments**

- Download RFP Response Forms

#### **Forms**

- Upload completed RFP Response Forms

#### **Cost (Items)**

- Enter total proposed cost

### **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. The USO reserves the right to also invite agencies 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 agencies who meet the qualifications and provide the date, time, and format for the presentation.

#### **Withdrawal or Modification of Proposals**

A Vendor may modify or withdraw its proposal in Coupa Sourcing on or before **April 25, 2024**.

#### **Late Submissions**

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

#### **Best and Final Offers**

After receiving the original proposals, USO reserves the right to notify all technically acceptable agencies 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 Agency 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 agencies still within the competitive range.

**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 agencies.

#### **Post-Award Information**

##### **Anticipated Award Date**

The anticipated notice of award date is **May 15, 2024**

##### **Post-Award Conference/Kickoff Meeting**

Upon notice of award, the USO will coordinate an award kickoff meeting within 7 days with the Agency. 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 Agency shall take all necessary steps to prepare for performance of the services required hereunder. The Agency shall have a maximum of 10 calendar days to complete these steps.

Following receipt from the Agency of acceptable evidence that the Agency 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 Agency agrees to an earlier date), the Agency 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 as long as the USO and Agency both agree that the relationship and services provided are mutually beneficial. The initial period of performance includes any transition period authorized under the contract.

##### **Documentation Requirements**

The telemarketing Agency 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 Agency 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 Agency, and re-work will be done at the Agency'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 agencies not selected may receive a post-award debriefing provided a written request is submitted to [procurement@uso.org](mailto: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 appeal or challenge.