



SMS Platform & Services

REQUEST FOR PROPOSAL

Document Reference USO-SMSPlatform2024

March 18, 2024

KEY DATES	
RFP Posted Online	March 18, 2024
Request for Proposal Released	March 25, 2024
Deadline for Questions	April 1, 2024
Q&A Shared with all Vendors	April 5, 2024
Deadline for Proposals	April 19, 2024
Down select Notification	April 24, 2024
Target Week for Presentations	May 6 – 10, 2024
Projected Award Date	May 20, 2024
Projected Start Date	TBD

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 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 support is 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 corp.

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



PROJECT SUMMARY

The USO is seeking a text messaging partner to perform the following services for its direct response digital program:

- Consult and set up USO SMS software for fundraising within the digital program for Acquisition, Lapsed, Pre lapsed, Mid-level, and Sustainer audiences.
- To help send messages on broadcast, analyze results, and perform testing.
- Ability to ingest data from the digital CRM (HUB)
- Provide recommendations for channel mix and/or integrated channel strategy for testing.

The successful bidder will be able to help the USO grow the SMS program to achieve \$1.25MM in gross revenues while successfully positioning the USO to donors and prospects as an urgent mission worthy of support in a very competitive philanthropic marketplace.

Additionally, the USO wishes to continue its focus on acquiring and retaining donors with improved LTV and to continue to maximize the existing donors based with a focus on retention.

PURPOSE

The USO expects to make one award under this RFP. The period of performance is 12 months.

The anticipated contract award date is approximately May 20, 2024

Anticipated funding for this project including both for platform cost and SMS credits will be between \$400,000 to \$425,000.

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 19, 2024



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.

Tasks and Subtasks

Task 1: Production Process / Maintenance & Support

1. Access to curate, segment & deploy text messages.
 - a. Access for production team to create SMS on platform, create segmentation and provide final sign-off prior to scheduling and sending text messages.
2. Ability to curate and deploy MMS.
 - a. Includes opt-in/opt-outs and keyword support.
3. Testing capabilities with different portions of our current opted -in list.
4. List maintenance (i.e. bounce monitoring, cleaning of bad numbers, etc.)
5. Software support & maintenance
 - a. Platform / dashboard training
 - b. Afterhours support and contact

Task 2: Audience Segmentation

1. Audience segmentation based on criteria including, but not limited to:
 - a. Donor status (supported by Hub data sync)
 - b. Donation date
 - c. Opt-in date
 - d. Most recent click dates.
 - e. Link clicked status.
 - f. Tags (created by admins/users through upload)
2. Results sharing on a send-by-send basis.
3. Profile match with Hub
4. Bulk removal of tags
5. Advanced segmentation
6. Saving searches to reuse
7. Combining criteria
8. Donor type identification on platform (i.e. sustainer vs. one-time donor)

Task 3: Migration Support & Technical Requirement

1. Pulling lists from previous platform with information requested
2. Creation of custom columns to match information from previous platform.
3. Upload and creation of profiles
4. Short code transition
5. API Integration to the Digital CRM (HUB)

**API Requirements include:**

1. User-level Data
 - a. APIs/webbooks to add/update phone numbers, with real-time replies as to the phone numbers.
 - b. Subscription status
 - c. APIs/webbooks to receive opt-out or otherwise removed phone numbers.
 - d. Bulk import via an API to update all records.
 - e. Allow phone numbers to be re-subscribed.
 - f. Custom data columns that can be created managed via an API, that can be used in personalization and querying.
 - g. The ability to add tags to records, and the ability to remove all tags from all users, or other method to mark an arbitrary set of records.
2. Aggregate message level data
 - a. The ability to retrieve via an API or webbook at least the following data:
 - i. Sent date/time, message content, contact source name, sent, received, bounced, clicks (unique and gross), unsubscribes.
3. Phone number level event data
 - a. The ability to programmatically retrieve event level data including sent, bounce, and click, ideally with carrier markers for each phone number.
 - b. Ideally the ability to auto-source code links. Maybe phrased as “the ability to add data from custom columns and system level data (ex., mailing ID) to URLs within messages”.
 - c. Make sure the system can do link tracking at a unique level and at a custom domain.

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. Credit Review and product updates	Monthly
2. Provide strategic input, cadence timing, segmentation input, matrix input and counts output against annual plan.	Monthly
3. Provide campaign level reporting	Monthly



SOW DETAILS FOR PROPOSAL SUBMISSION

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.

Technical Solution

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

Management Plan & 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.
- 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.

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.
- 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.

**Cost Proposal**

Provide a quote in table form that supports the entire Scope of Work, including all expected expenditures and fees. The quote should include software license cost, short code lease cost, messaging subscription fees as well as CRM integration cost. 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 #3							

- **Pricing by Key Personnel**

Name	Title/Role on Project Team	Rate	Hours	Direct Cost	Indirect Cost	Total Cost
Key Person #1						
Key Person #2						
Key Person #3						

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



TERMS AND CONDITIONS

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 Task 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; Juneteenth; Independence Day; Labor Day; Veterans Day; Thanksgiving Day; Day after Thanksgiving Day and Christmas Day. Contingency plans and afterhours support to be available during Giving Tuesday and end-of-year campaigns and any other major campaign as discussed and decided.

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 the contract award, the Vendor may be required to sign a Nondisclosure 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 the 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 the 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

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 Vendor 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 unreasonable 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	35%
Management Plan & Approach	25%
Past Performance	20%
Cost (must be at least 20%)	20%

The 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.
- **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 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 **Coupa Sourcing Vendor Guide**
- Download and review **RFP Document Terms and Conditions**

Attachments

- Download RFP Response Forms

Forms

- Upload completed RFP Response Forms

Items and Services

- Enter cost per task
- 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 for the opportunity to provide an oral presentation.

Withdrawal or Modification of Proposals

A Vendor may modify or withdraw its proposal on or April 19, 2024. 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 RFQ. 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 May 20, 2024

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 or longer as annual contract renewals are possible based on the needs and requirements of the USO. 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 variable cost-plus type 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.