



Donor Segmentation Research

REQUEST FOR PROPOSAL

Document Reference USO-DonorSegmentRsrch2021

August 19, 2021

KEY DATES	
Request for Proposal Posted	August 19, 2021
Request for Proposal Released	August 30, 2021
Deadline for Questions	September 13, 2021
Q&A Shared with all Vendors	September 20, 2021
Deadline for Proposals	October 4, 2021
Projected Award Date	October 11, 2021
Projected Start Date	October 18, 2021



ABOUT THE UNITED SERVICE ORGANIZATIONS

Amidst extraordinary global change, United States military service members continue to rise to every challenge our country asks them to face. Each day, they voluntarily make sacrifices for our nation, selflessly stepping into danger to be a force for good in the world. But what does it take to keep them strong? It takes a force – a Force Behind the Forces®.

We are the *Force Behind the Forces*. The USO strengthens America's military service members by keeping them connected to family, home and country, throughout their service to the nation. We believe that all Americans — united in spirit and action for our service members — can change lives, communities, our military and our country, all for the better. Together, we express America's gratitude and commitment to the Armed Forces.

Since 1941, the USO, a private, nonprofit organization, has served the men and women in 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. Whether they're in Iraq, South Korea or on the front lines of the COVID-19 pandemic – military members and their families need to know there is a force behind them ensuring that home is always by their side. Through a global network of more than 250 USO centers, the USO provides programs, services and entertainment focused on connection, strengthening, wellness and resiliency.

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. Millions of generous donors, tens of thousands of volunteers and a few hundred employees form the *Force Behind the Forces*. Fueled by the collective impact of this network of military supporters, we go where no other nonprofit organization goes to keep our service members connected to everything that gives meaning to their service.

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

United Service Organizations
2111 Wilson Blvd, Suite 1200
Arlington, Virginia 22201



PROJECT SUMMARY

This research is a critical, foundational input into the development of the USO Brand Transformation effort which is a key strategic priority for the organization. Through this effort, the USO has the goal of increasing the awareness of the USO's relevance and value of the mission to a broader swath of the American public. Within this strategic priority, there is also a goal to grow and maintain a healthy Direct Response file as a way to increase revenue generation to ensure full support of the USO mission in the years to come. Specifically, we would like to acquire a large number of incremental individual donors who are of younger generations than the majority of our current donors, who skew strongly to Baby Boomer and Silent Generation members. In order to accomplish these goals, we must ensure our brand transformation strategy is guided by a strong understanding of our new priority donor segment(s). With this clarity about the key prospect group we are targeting, we can focus our marketing and communication efforts to drive donor acquisition more effectively.

Learning objectives

Key learning objectives of this research:

1. Develop an attitudinal quantitative USO donor segmentation that can be used to identify and prioritize distinct segments of U.S. Non-Profit donors for donor acquisition. Will need to enable
 - a. Ability to identify individuals who fall into each segment through a screening process
 - b. Quantification of the revenue opportunity by segment (number of people represented in each segment and indicators of annual donations)
 - c. Actionability for marketing and communication efforts (e.g., directional information about communication channel usage/media consumption, areas of geographic concentration)
2. Gain a deeper, qualitative understanding of the prioritized segment(s) so that the quantitative data is even more actionable. This includes
 - a. Insights behind barriers and triggers to USO donation as identified in the segmentation
 - b. Understanding key aspects of their non-profit donation behavior, such as what drives donation timing, amount, and the "competitive set" formulation for them
 - c. Reactions to refined USO overall brand positionings, including reframed brand promise and key reasons-to-believe (such as impact of core programs, organizational attributes, and "brand legacy.")

The USO expects to make one award under this RFP. The period of performance is from October 18, 2021 to March 18, 2022.

The anticipated contract award date is approximately October 11, 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 \$250,000 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 October 4, 2021.

KEY DATES	
Request for Proposal Posted	August 23, 2021
Request for Proposal Released	August 30, 2021
Deadline for Questions	September 13, 2021
Q&A Shared with all Vendors	September 20, 2021
Deadline for Proposals	October 4, 2021
Projected Award Date	October 11, 2021
Projected Start Date	October 18, 2021



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 October 4, 2021.



Contents

ABOUT THE UNITED SERVICE ORGANIZATIONS	iii
PROJECT SUMMARY	iv
RECOMMENDED STEPS FOR SUBMISSION	vi
BACKGROUND	2
PROJECT REQUIREMENTS	3
Scope of Work (SOW)	3
Tasks and Subtasks.....	3
Key Deliverables.....	4
Period of Performance.....	7
Proposal Evaluation Criteria	8
Overview	8
SUBMISSION GUIDELINES	9
Post-Submission Information.....	10
Withdrawal or Modification of Proposals	10
Late Submissions.....	10
Best and Final Offers	10
Retention of Proposals.....	10
Post-Award Information	10
Anticipated Award Date	10
Post-Award Conference/Kickoff Meeting.....	11
Notice to Proceed.....	11
Period of Performance	11
Documentation Requirements.....	11
Basis of Compensation to the Vendor.....	11
Debrief – Post-award.....	12
Protests/Appeals.....	12
Appendix A: Past Performance Chart	13



BACKGROUND

This research is the most critical, foundational input into the development of the Brand Transformation strategy which is the Key Initiative of Strategic Priority #2 in the USO's Strategic Plan. This priority has the goal of *increasing the awareness of the USO's relevance and value of the mission to a broader swath of the American public*. Within this strategic priority, we also have a goal to grow and maintain a healthy Direct Response file as a way to increase revenue generation to ensure full support of the USO mission in the years to come. Specifically, we would like to acquire a large number of incremental individual donors who are of younger generations than the majority of our current donors. In order to accomplish these goals, we must ensure our brand transformation strategy is guided by a strong understanding of our new priority donor segment(s). With this clarity about the key prospect group we are targeting, we can focus our marketing and communication efforts to drive donor acquisition more effectively.

Learning objectives

Key learning objectives of this research:

3. Develop an attitudinal quantitative USO donor segmentation that can be used to identify and prioritize distinct segments of U.S. Non-Profit donors for donor acquisition. Will need to enable
 - a. Ability to identify individuals who fall into each segment through a screening process
 - b. Quantification of the revenue opportunity by segment (number of people represented in each segment and indicators of annual donations)
 - c. Actionability for marketing and communication efforts (e.g., directional information about communication channel usage/media consumption, areas of geographic concentration)
4. Gain a deeper, qualitative understanding of the prioritized segment(s) so that the quantitative data is even more actionable. This includes
 - d. Insights behind barriers and triggers to USO donation as identified in the segmentation
 - e. Understanding key aspects of their non-profit donation behavior, such as what drives donation timing, amount, and the "competitive set" formulation for them
 - f. Reactions to refined USO overall brand positionings, including reframed brand promise and key reasons-to-believe (such as impact of core programs, organizational attributes, and "brand legacy.")



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.

Tasks and Subtasks

1. Task 1 - Quantitative segmentation of prospective donors

The Vendor will design, develop, field and analyze a large-scale, quantitative attitudinal and claimed-behavioral segmentation study that can be effectively used to 1) identify current distinct prospective donor segments within Generations X & Y, 2) quantify the market opportunity of each segment, 3) prioritize the USO's strategic targeting plans, and 4) inform a marketing communications effort – both creative development areas to explore and channel usage to drive donor conversion. Research must include an alienation-check cell of current Baby Boomer USO donors that is large enough to provide statistical confidence in a comparison with the primary sample.

Task 1 for this project may include:

- Subtask 1.1 in support of Task 1: Vendor will develop a detailed research methodology design based on a robust understanding of the USO's current strategic situation and needs by reviewing key documents as provided by the USO and through conversations with key members of the USO team. The vendor may also recommend other needed inputs for the segmentation to be successful.
- Subtask 1.2 in support of Task 1: Vendor will lead the development process for the segmentation study. This includes managing the timeline, driving and guiding the screener and questionnaire development, leveraging non-profit industry best practices, and including key USO stakeholders as defined by the client.
- Subtask 1.3 in support of Task 1: Vendor will field the segmentation study and manage all technical aspects of its execution, including recruitment. The sample size will be representative of the agreed upon respondent "universe" (ex. 26-55 current nonprofit donors) and large enough to conduct the statistical analysis needed to develop robust segments with actionable differentiating factors.
- Subtask 1.4 in support of Task 1: Vendor will conduct detailed statistical analysis of the quantitative study data, including identification of key correlations that can be used to determine defined prospective donor segments for the USO. Report for Task 1 will be developed and shared with USO project team. Report will include key insights, segment information, and full results from study, which can be in an Appendix.

2. Task 2 - Follow-on qualitative of the prioritized segment(s)

The Vendor will design and execute a phase of qualitative research following the quantitative study that will provide the USO team with a deeper, richer understanding of the primary segment(s) that will be targeted for conversion to USO donation. This research will include learning on the barriers and triggers to USO donation, insights into their donation behavior, and reactions to refined USO brand positioning elements (such as brand promise and reasons-to-believe.).



Task 2 for this project may include:

- Subtask 2.1 in support of Task 2: Vendor will develop a research design that delivers against the identified learning objectives and is executable in the given timeframe. The design should allow for key USO team members to observe, or even participate in, the interactions with the priority segment donors.
- Subtask 2.2 in support of Task 2: Vendor will execute the qualitative research. This includes recruitment and screening, project management, moderation with respondents, and any technical management needed to activate approved research methodology
- Subtask 2.3 in support of Task 2: Summary report of Task 2 will be created and delivered. It should include insight themes and key learnings that build on or are incremental to learnings from the quantitative. It should include evocative elements that help the USO team internalize the key insights, such as verbatims, images and videos. This summary should include full and rich "Personas" for each of the segments explored in the qualitative phase.

3. Task 3 - Final summary report

The Vendor will develop and present a final project report that includes an executive summary that articulates the prioritized segments, the overarching core insights, and recommended actions to drive conversion among the priority segment(s).

Task 3 for this project may include:

- Subtask 3.1 in support of Task 3: Vendor should draft synthesized full report and share with primary USO contact for feedback and discussion.
- Subtask 3.2 in support of Task 3: Vendor will present a curated version of the final report to USO leadership. Specific audience for this presentation to be determined by the USO project lead. Modality of this presentation (e.g., in person or virtual) to be determined based on needs of the USO and the current status of the Covid-19 pandemic.
- Subtask 3.3 in support of Task 3: Final version of the full presentation, including quantitative and qualitative phases, and addressing any key feedback from the presentation to senior leadership, should be delivered to the USO project lead.

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	October – December 17, 2021
2. Task 2	December 18, 2021 – February 18, 2022
3. Task 3	February 19 – March 18, 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.
- Maximum length: 3 pages

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 2 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 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.
 - 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.



Period of Performance

The period of performance for the project is from October 18, 2021 to March 18, 2022.

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; Juneteenth; 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)).

Proposed 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, in USO's sole discretion, 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 Forms in Coupa Sourcing and **Upload** responses.
 - Statement of Understanding
 - Technical Task 1
 - Technical Task 2
 - Technical Task 3
 - Management Approach
 - Management Plan
 - Proposed Project Team Members
 - Subcontracting Plans
 - Corporate Qualifications
 - Past Performance
 - Cost Proposal

Cost (Items & Lots)

- **Enter Total Cost of Your Proposal**



Post-Submission Information

Withdrawal or Modification of Proposals

A Vendor may modify or withdraw its proposal on or before October 4, 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 constitute a contract and 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 October 11, 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 5 months ending on March 18, 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			