



USO Planned Giving (Amended)

REQUEST FOR PROPOSAL

Document Reference USO-PlannedGiving2021

November 16, 2021

KEY DATES	
Amended Request for Proposal Released	November 16, 2021
Deadline for Questions	November 22, 2021
Q&A Shared with all Vendors	November 29, 2021
Deadline for Proposals	December 23, 2021
Target Time Frame for Oral Presentations	December 27, 2021 – January 14, 2022
Projected Award Date	January 19, 2022
Projected Start Date	January 31, 2022



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
2111 Wilson Blvd, Suite 1200
Arlington, Virginia 22201**



PROJECT SUMMARY

The USO seeks a contractor(s) to plan, develop and execute an organization-wide planned giving marketing program that will resonate with key constituents, identify new gifts and provide meaningful stewardship of donors at the national and local level. The goal is to consistently grow the number of planned gifts in the pipeline triple annual bequest revenue over the next five years. The current planned giving marketing program includes traditional forms of promoting planned giving including print/electronic newsletters, targeted mailings on estate and gift planning, social media postings, webpage on USO.org, and basic messaging in direct mail solicitations. For many years, the program has lacked a full time planned giving staff person until a director was hired in May 2021. The transition from a federated structure to a single corporation ("One USO") provides an opportunity for growth in all facets of planned giving. Most of the planned giving activity to date has been done on the national level with little coordinated activity done at the region and local levels. On average, the USO has approximately 50 to 60 new estates open each year with bequest revenue ranging from \$1MM to \$5MM annually. There are approximately 130 members of the "1941 Legacy Society". The USO also seeks to identify a partner capable of guiding and collaborating on new marketing, prospecting and stewardship strategies, including but not limited to planned giving direct mail, electronic/digital marketing, web-based promotions, social media, prospect identification, cultivation, stewardship and legacy society promotions. The purpose of this RFI is to identify a vendor with the capacity to provide requested services (listed below), who demonstrates an understanding of the USO's mission, and whose management plan and services best suit the current day needs of the USO and its planned giving program.

PURPOSE

The USO expects to make one award under this RFP. The period of performance is from **January 31, 2022 to December 31, 2022**. The anticipated contract award date is approximately **January 19, 2022**.

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 23, 2022** 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 23, 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.

For many years, the program has lacked a full time planned giving staff person until a director was hired in May 2021. The transition from a federated structure to a single corporation ("One USO") provides an opportunity for growth in all facets of planned giving. Most of the planned giving activity to date has been done on the national level with little coordinated activity done at the region and local levels. On average, the USO has approximately 50 to 60 new estates open each year with bequest revenue ranging from \$1MM to \$5MM annually. There are approximately 130 members of the "1941 Legacy Society".



PROJECT REQUIREMENTS

Scope of Work (SOW)

The USO seeks a vendor to plan, develop and execute an organization-wide planned giving marketing program that will resonate with key constituents, identify new gifts and provide meaningful stewardship of donors at the national and local level. The goal is to consistently grow the number of planned gifts in the pipeline triple annual bequest revenue over the next five years.

The current planned giving marketing program includes traditional forms of promoting planned giving including print/electronic newsletters, targeted mailings on estate and gift planning, social media postings, webpage on USO.org, and basic messaging in direct mail solicitations. The USO also seeks to identify a vendor capable of guiding and collaborating on new marketing, prospecting and stewardship strategies, including but not limited to planned giving direct mail, electronic/digital marketing, web-based promotions, social media, prospect identification, cultivation, stewardship and legacy society promotions.

The purpose of this RFP is to identify a vendor with the capacity to provide requested services, who demonstrates an understanding of the USO's mission, and whose management plan and services best suit the current day needs of the USO and its planned giving program.

Key Deliverables

The Vendor should include a list of Key Deliverables they warrant as pertinent to the SOW in executing their vision and approach to the USO Planned Giving Project.

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

- Based on the Scope of Work, present your vision of the services you would provide to satisfy the overall needs of USO Planned Giving Project.

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.

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 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.

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

1. Quote for Services

1.1 Provide your quote to include proposed Billing Rates per Person/Labor Category and Hours required to meet the USO Planned Giving Project Requirements. Travel will be reimbursed, at cost, according to USO travel guidelines (based on federal travel regulations).

TERMS AND CONDITIONS

Period of Performance

The period of performance is from **January 31, 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 proposals

Acceptance of Coupa Sourcing Event

- Click on the link provided in the email invite from Coupa Sourcing
- Download **Coupa Sourcing 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 Step-By-Step Documentation**
- Download **Supporting Documentation** (If applicable)
- Download **Cover Letter** Document
- Upload completed **Cover Letter**
- Download **Key Deliverables** Document
- Upload **Key Deliverables** Document

Forms

- **Download** Technical Proposal Forms in Coupa Sourcing and **Upload** responses
 - Statement of Understanding
 - Technical Solution
 - Management Approach
 - Management Plan
 - Proposed Project Team Members
 - Subcontracting Plans (if applicable)
 - 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 for selected vendors to provide an oral presentation.

Withdrawal or Modification of Proposals

A Vendor may modify or withdraw its proposal on or before December 23, 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 **January 19, 2022**.

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 11 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 rework 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			