



## **USO Digital Transformation Roadmap**

### **REQUEST FOR PROPOSAL**

Document Reference USOIT-DIGITALTRANSFORM 2022

January 3, 2022

<b>KEY DATES</b>	
Request for Proposal Posted	January 3, 2022
Request for Proposal Released	January 18, 2022
Deadline for Questions	January 28, 2022
Q&A Shared with all Vendors	February 4, 2022
Deadline for Proposals	February 25, 2022
Target Week for Oral Presentations	February 28 – March 4, 2022
Projected Award Date	March 11, 2022
Projected Start Date	March 21, 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](http://www.uso.org/about)*

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



## PROJECT SUMMARY

The purpose of this request is to partner with a vendor in the development of an actionable roadmap for digital transformation at the USO that details the priorities, timelines, and required investments. The goal of digital transformation at USO is to develop a data-driven culture, business processes, and technology infrastructure to advance mission delivery and fundraising efforts and to empower employees and volunteers to make data-informed decision-making. The USO identified three key strategies aligned to this objective: (1) Improve data collection and analysis capabilities to produce more efficient and effective program delivery, fundraising, and employee/ volunteer recruitment and retention, (2) The creation of new digital programs and channels to increase audiences and grow engagement through meaningful interactions among service members, military family, and donor audiences, and (3) Increase our organizational digital fluency and competence, empowering staff members to innovate and execute effectively.

The successful bidder will explore the current state at the USO, industry trends, and comparable organizations to validate our baseline and establish the foundation for transformative recommendations. Additionally, the bidder will conduct tasks to construct the future state, strategy development, and roadmap needed to build awareness, consensus, and executive/key stakeholders buy-in at the USO. The bidder shall provide a change management strategy that supports the long-term success and sustainment of transformation.

## PURPOSE

The USO expects to make one award under this RFP. The period of performance is March 21, 2022 to August 31, 2022 or as proposed by the awarded vendor.

The anticipated contract award date is approximately March 11, 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.

**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 February 25, 2022.



## 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 February 25, 2022.



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## BACKGROUND

The purpose of this request is to partner with a vendor in the development of an actionable roadmap for digital transformation at the USO that details the priorities, timelines, and required investments. The goal of digital transformation at USO is to develop a data-driven culture, business processes, and technology infrastructure to advance mission delivery and fundraising efforts and to empower employees and volunteers to make data-informed decision-making. The USO identified three key strategies aligned to this objective: (1) Improve data collection and analysis capabilities to produce more efficient and effective program delivery, fundraising, and employee/ volunteer recruitment and retention, (2) The creation of new digital programs and channels to increase audiences and grow engagement through meaningful interactions among service members, military family, and donor audiences, and (3) Increase our organizational digital fluency and competence, empowering staff members to innovate and execute effectively.

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## 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

**Task 1: Explore Current State:** Stakeholder Interviews, Research and Analyze Industry Trends, Inventory Existing Technology Architecture and Manning, and Conduct USO's Digital Capabilities Assessment and Analysis

Projects may include but are not limited to:

- *Subtask 1.1..... Conduct external (selected few donors or corporate sponsors) and internal stakeholder interviews to identify pain points and potential synergies along with key workflow/process mapping, maximize stakeholder experience, and streamline data integrity.*
- *Subtask 1.2 ..... Complete Industry Research and analysis to better understand how digital transformations are/have been beneficial in the nonprofit space. Analyze, and report on industry trends in the nonprofit vertical. The vendor will be asked to analyze and address questions such as:*
  - *What is the expected ROI on implementing a comprehensive digital transformation plan?*
  - *How have other NGOs communicated with stakeholders to get their buy-in through the initial adoption and implementation of digital transformation strategies?*
  - *What would other NGO's change about their digital transformation projects – either approach or execution that we could learn from and apply to our strategy?*
- *Subtask 1.3 ..... Conduct technology infrastructure, manning, and data architecture review with attention to gaps, efficiency, cost savings, increased data sharing across departments, and maximize ROI of Digital Transformation. This includes identifying duplicate technologies, gaps between current UX/UI best practices and current USO digital offerings and areas to improve customer interfaces (e.g., uso.org, USO app, and center check-in functionality).*
- *Subtask 1.4 ..... Combine Analysis and recommendations from stakeholder interviews, industry analysis, inventory of existing technology architecture and manning, and inputs provided by USO (including the Gap Analysis cell) to conduct USO's digital capabilities assessment. All recommendations should include new items and those required for sustainment. The results of that research will include but not limited to the following:*
  - *What the USO is doing well? What can be improved?*
  - *What digital capabilities are required to enable other strategic/business priorities?*
  - *What are the best ways to safeguard our data?*
  - *How digital transformation can help expand our value proposition to our stakeholders?*
  - *What are the best KPIs to measure impact and ROI?*
  - *What equipment, applications, infrastructure, and manning are recommended?*
- *Subtask 1.5 ..... Comprehensive Assessment and Summary Report with Recommendations no longer than 15 PPT slides that will serve as the Executive Presentation to the USO Senior*



*Leadership Team. Visuals and graphics with accompanying talking points annotated in notes are highly encouraged rather than heavy text. All data used to produce visuals and graphics will be shared with Digital Transformation Tiger Team. The findings will be used to establish the foundation for Task 2, building Digital Strategy.*

## **Task 2: Future State / Strategy Development (Vision Statement and Desired Outcomes) and Digital Transformation Roadmap**

This task seeks to build consensus and obtain the necessary approvals and executive buy-in.

Projects may include but are not limited to:

- *Subtask 2.1.....* Working closely with the USO Digital Transformation Team, develop a Digital Vision Statement and recommended outcomes to deliver on the vision statement, that align with and supports the organization's goals and other four (4) USO 2020-2030 Strategic Priorities. The Vision Statement should include a description of the "what" and the "why", outlining the value in both qualitative and quantitative terms of the realization of the vision to the extent feasible. Recommended outcomes may include infrastructure improvements/synergies, digital capabilities, additional manpower needed to implement changes and maintain after adoption, changes to operating model and processes to leverage the future state, or human/change management techniques to aid in mindset shift with key stakeholders needed to move forward.
- *Subtask 2.2.....* Solicit executive feedback and organizational vision. This includes a discussion with the USO Senior Leadership Team (SLT) on the Digital Vision Statement and the future of USO. Utilizing the Task 1 Completed Assessment and Summary Report, the discussion will focus on the future state of USO and its Digital Strategy development. The Vendor's role is to help foster leadership buy-in, provide its expertise, and cultivate executive sponsorship. Topics addressed may include, but not be limited to:
  - Achieving the defined goals and outcomes of the strategic priorities
  - What the USO looks like, from various stakeholders, in 5 years? 10 years?
  - USO ongoing involvement and staffing resources needed to accomplish successful execution of the Digital Transformation Roadmap
  - Balancing innovation and sustainment in the future
- *Subtask 2.3 .....* Develop Digital Transformation Roadmap with key initiatives that focus on people, process, and technology that is scalable, sellable, and actionable with thoughtfully sequenced goals which define the transition of the current state to future state. This roadmap should provide clear direction on activities for digital initiatives for the next three to five years, support the execution of all USO Strategic Priorities across USO departments and geographies, address identified gaps, and help foster and maintain a data-driven culture of shared customer insights. The initiatives should be prioritized by their projected business value, mission impact and potential ROI.
- *Subtask 2.4 .....* Summarize findings and Digital Transformation Roadmap in an In-person/Virtual Presentation to USO Digital Transformation Tiger Team. Visuals and graphics with accompanying talking points annotated in notes are highly encouraged rather than heavy text. Incorporate their feedback into deliverables to USO Senior Leadership Team.





### **Task 3: Build Stakeholder Confidence and Develop Implementation and Sustainment Strategies for Change Management**

This task seeks to build key stakeholder confidence and develop implementation strategies for sustained, successful change management.

Projects may include but are not limited to:

- *Subtask 3.1.....* Develop detailed one-page summaries that break down key audiences/stakeholders, next steps, metrics, costs, internal resources required (e.g. time, personnel, etc.), gaps addressed, and any dependencies. Each summary will identify potential risks if not executed.
- *Subtask 3.2.....* Create an overall Rough Order of Magnitude (ROM) budget to execute the Digital transformation initiatives and ways to scale up or down, depending on budget cycle.
- *Subtask 3.3.....* Identify key performance indicators (KPIs) and how to measure them throughout the roadmap to measure initiatives' success.
- *Subtask 3.4.....* Create Digital Business Design with holistic consideration of the people (roles, accountability, structures, skills, and training), process (workflows, routines, and procedures), insights (using data collected to make data-driven decisions, communicating expectations and results, and how can we create a culture around it), and technology (infrastructure and applications) required to achieve the desired digital transformation outcomes. This should include USO staff levels, training resources, and other change management activities needed to achieve the objectives and outcomes of the digital transformation roadmap and ensure its sustained success.
- *Subtask 3.5.....* Recommend best practice for Internal/External Communications to key stakeholder groups.
- *Subtask 3.6.....* Final Executive Report and In-person/Virtual Presentation of the Digital Transformation Roadmap to USO Digital Transformation Team. This version of the Comprehensive Report will be used to brief the USO Senior Leadership Team and execute the plan. Visuals and graphics are highly encouraged rather than heavy text.

### **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.

<b>SOW and/or Task Specific Deliverables</b>	<b>Timing</b>
1. Project kickoff slides, including introduction of team members, overview of understanding the objectives of the project, notional timeline with critical path and dependencies, communication plan, risks and projected financial burn	Within 14 calendar days of contract award and signature of MSA & SOW
2. Weekly progress reports – summary of activities completed, planned activities for the following week, upcoming key milestones, newly identified risks, and any questions/concerns requiring USO response	Weekly no later than Wednesday COB of the following week



SOW and/or Task Specific Deliverables	Timing
3. Monthly reports – summary of accomplishments, progress relative to project schedule with updated/revised dates and explanation of any changes, projected activities in the next month, financial status including expenditures to date relative to projected burn and estimate to completion	Within in 5 business days of the first of each month
4. Task 1.5 – Current state assessment and summary report with recommendations	As proposed by the vendor
5. Task 2.1 – Digital vision statement	As proposed by the vendor
6. Task 2.3 – Digital Transformation roadmap	As proposed by the vendor
7. Task 2.4 – Presentation of digital transformation roadmap and findings	As proposed by the vendor
8. Task 3.1 – One-page summaries of the key audiences/stakeholders and requirements for change management of that audience	As proposed by the vendor
9. Task 3.2 – Rough order of magnitude (ROM) budget for execution of the digital transformation initiative identified in Task 2, including options to scale up or down	As proposed by the vendor
10. Task 3.3 – Key Performance Indicators (KPIs) to measure achievement of business goals identified in Task 2 throughout roadmap execution	As proposed by the vendor
11. Task 3.4 – Digital business designs with consideration of the people, process, insights, and technology required to achieve digital transformation outcomes identified in Tasks 1 and 2	As proposed by the vendor
12. Task 3.5 – Recommended best practices for internal/external stakeholder communications	As proposed by the vendor
13. Task 3.6 – Final executive report/presentation of the digital transformation roadmap, ROM, KPIs, and change management strategy	As proposed by the vendor

## 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.*

### 1. Statement of Understanding

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

### 2. Technical Solution

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

### 3. 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.



### **3.1 Management Plan**

- Describe the overall plan for organizing, staffing, and managing the tasks required by the Scope of Work. 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

### **3.2 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.

### **3.3 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. If not applicable, please confirm it as such.

### **3.4 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 directly relevant technical and substantive experience (capabilities, skills, resources, team members, etc. that uniquely qualify the Vendor for the Scope of Work).

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

Sample templates for labor category and rates:

### Pricing by Task

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

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

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

### Period of Performance

The period of performance for the project is March 21, 2022 to August 31, 2022 or as proposed by the awarded vendor.



### **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	40%
Management Approach	10%
Past Performance	30%
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.

Digital assets (e.g., video or display units, etc.) developed for the case study should be provided through a link in the case study documentation to an easy-to-use, password protected platform.

### Attachments

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

### Forms

- **Download** Scope of Work Form in Coupa Sourcing and **Upload** responses.
  - Statement of Understanding:
  - Technical Task 1
  - Technical Task 2
  - Technical Task 3
  - Management Approach
  - Management Plan
  - Proposed Project Team Members
  - Subcontracting Plans (If Relevant)
  - Corporate Qualifications
  - Past Performance
  - Cost Proposal

### Cost (Items & Lots)

- **Enter Total Cost of Your Proposal**



## **Post-Submission Information**

### **Vendor Proposal Down Select**

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

## **Oral Presentation**

### **Presentation Guidelines**

Selected vendors shall conduct an Oral Presentations of the submitted proposal. Cost should not be discussed during this presentation.

The Vendor may present either in person at 2111 Wilson Blvd, Suite 1200, Arlington VA 22201 or virtually, at the vendors discretion. Virtual presentations can be conducted using Zoom or Microsoft Teams meeting platforms.

The total duration of the presentation will be total of 60 minutes, starting when the lead presenter indicates readiness to proceed. At the end of 60 minutes of elapsed time the presentation will be terminated. Any material not covered during the 60-minute period will not be evaluated, and information not covered will be omitted from the proposal. The Vendor may only present material that has been previously submitted at the submission deadline date. Modifications to the proposal after the deadline will not be accepted.

Following the 60-minute presentation period the vendor team will be escorted to an adjacent location or put in a virtual waiting room for a 10-minute caucus. After the 10-minute caucus period the vendor team will be invited back for a 20-minute question and answer session with the evaluation team. The bidder team may caucus if desired to address any questions from the evaluation team.

Although not required, it is desirable for the presenters to be primarily composed of the bid delivery team key personnel. When introductions are made, the presenter(s) shall identify whether or not they will be involved with delivery post award, and if so in what role. Multiple presenters are acceptable. Every presenter shall introduce themselves by their title and position on the proposed delivery team.

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

A Vendor may modify or withdraw its proposal on or before February 25, 2022. 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 March 11, 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 5 months (August 31, 2022)**, or as proposed by the vendor. 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](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 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
<b>Name of contract</b>			
<b>Name of client or customer</b>			
<b>Contract type</b>			
<b>Dates of performance</b>			
<b>Total contract value</b>			
<b>Program manager and telephone number</b>			
<b>Contracting officer and telephone number</b>			
<b>Administrative contracting officer, if different from contracting officer, and telephone number</b>			
<b>List of major subcontracts</b>			