



USO Direct Response Marketing
REQUEST FOR PROPOSAL
Document Reference USO-DIRRESPNSMKTNG2022
December 22, 2022

KEY DATES	
RFP posted on uso.org and RFPDB sites	December 22, 2022
Request for Proposal Released	December 30, 2022
Deadline for Questions	January 13, 2023
Q&A Shared with all Vendors	January 20, 2023
Deadline for Proposals	January 27, 2023
Projected Award Date	February 10, 2023
Projected Start Date	March 1, 2023

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



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 purpose of this request is to retain a qualified, high-performing Agency to provide telemarketing services for the Direct Response Marketing Program of the United Service Organizations (USO).

Expertise in monthly giving donor recruitment and retention, on-demand voice broadcast and mid-level thank you calls, with proven success, are key to the Agency selected to manage the USO's telemarketing efforts. The Agency should have the capability to conduct top quality calls, provide a positive donor experience, offer competitive pricing, and generate long-term revenue from donors.

The chosen Agency will partner with the USO, and external agencies, to create a superior outbound telemarketing program that enables the organization to diversify the source of sustainer conversion as well as offer a personalized, engaging way to retain donors and reinstate those that have lapsed. It is crucial for the Agency to help build a comprehensive, reliable, value-driven telemarketing program that thrives year after year to support the organizations' mission.

PURPOSE

The USO expects to make one award under this RFP. The projected period of performance begins March 1, 2023.

The anticipated contract award date is February 10, 2023.

This will be a **Services and Materials contract**. Any related travel expenses required to support the Contract, if encountered during this contract, will be absorbed by the telemarketing Agency and not billable to the USO. The Agency will operate at the direction of and receive guidance from the USO when travel is required.

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 January 27, 2023, **via Coupa Sourcing**.



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 January 27, 2023.



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BACKGROUND

Expertise and experience in monthly giving donor recruitment and retention, on-demand voice broadcast and mid-level thank you calls, with proven success, are key considerations for USO in its selection of an Agency to manage the its telemarketing efforts. The Agency should have the capability to conduct top quality calls, provide a positive donor experience, offer competitive pricing, and generate long-term revenue from donors.

The selected Agency will work with the USO, and other agencies, to create a superior outbound telemarketing program that enables the organization to diversify the source of sustainer conversion as well as offer a personalized, engaging way to retain donors and reinstate those that have lapsed. It is crucial for the Agency to help build a comprehensive, reliable, value-driven telemarketing program that thrives year after year to support the organization's mission.



PROJECT REQUIREMENTS

Scope of Work (SOW)

The Agency selected will be responsible for performing all tasks and subtasks listed below, as well as additional tasks to be assigned, and meet mutually agreed upon deliverable dates.

Telemarketing Program Quantities

Sustainer Invitation (new and existing current donors): Estimated quantity – 100,000

Sustainer Upgrades (current sustainers): Estimated quantity – 24,000

Sustainer Lapsed Reactivation (sustainers who have cancelled): Estimated quantity – 26,000

Mid-Level Thank You's (current mid-level donors): Estimated quantity – 200 per month

Voice Broadcasting: Estimated quantity – 700,000, two campaigns per year

Tasks and Subtasks

Task 1: Agency is responsible for project management, data segmentation and script development, creation and deployment of fulfillment materials, and execution of all aspects of the telemarketing sustainer program.

Subtask 1.1 in support of Task 1: Collaborates with USO staff, and external consulting partners, to develop an effective strategy that is integrated with the organization's direct mail and digital direct response initiatives and creates a comprehensive donor journey. Agency partners with the team to identify opportunities and efficiencies to optimize the program and meet performance goals. RFP should include overall approach to conducting an exceptional telemarketing sustainer program with data-driven strategies that are measured, evaluated, and continuously improved.

Subtask 1.2 in support of Task 1: Provides campaign strategy documents for sustainer initiatives which may include: invite to new and existing donors, upgrade/upsell offers, additional gifts, cultivation calls, and lapsed reactivation efforts. Strategy briefs should consist of the campaign schedule, audience segmentation and modeling recommendations, revenue/expense projections, creative/messaging approach and suggested testing (messaging, ask amounts, premiums, etc.). Reviews documents with USO staff for feedback and approval prior to the launch of the sustainer campaigns. RFP should include an example of this document.

Subtask 1.3 in support of Task 1: Incorporates USO Home Team branding into the telemarketing efforts including scripts, pledge letters and email creative.

Subtask 1.4 in support of Task 1: Partners with the USO, and other agencies, to identify audience selection and determine file segmentation approach. The goal is to maximize the performance of each campaign resulting in meeting or exceeding the projected revenue while staying within the approved budget. Agency will consult with the USO if results indicate extending certain efforts could increase performance of telemarketing overall.



Subtask 1.5 in support of Task 1: Provides results and strategic recommendations including campaign enhancements, extensions, course corrections and testing justifications with metrics to drive performance and meet goals at acceptable CPDR's.

Subtask 1.6 in support of Task 1: Creates caller fact sheets, frequently asked questions with answers, and customized scripts. Within the agreed upon timeframe, designs, prints and fulfills audience specific pledge and reminder letters, and creates and deploys customized emails or provides content for digital agency to handle.

Task 2: Agency provides projected telemarketing sustainer campaign metrics, develops expense and revenue budgets, and delivers detailed reporting and analytics for the program with recommendations for improvement.

Subtask 2.1 in support of Task 2: Expense budget should come in at or below the projection. Agency discloses all expected costs for the telemarketing program in the RFP.

Subtask 2.2 in support of Task 2: Realistic revenue projections should be set from the beginning of each campaign and annually. The telemarketing sustainer program should meet or exceed the expectations, achieving growth in this channel to successfully acquire sustainers.

Subtask 2.3 in support of Task 2: Each campaign is expected to meet a specific number of sustainers recruited, contacts per hour, credit card rate, pledge rate, fulfillment rate and average gift. Retention of the sustainers acquired is vital to the programs' success.

Subtask 2.4 in support of Task 2: Agency provides account summary reports in a format agreed upon by the USO including weekly fulfillment and segment performance, daily calls and donations, actuals versus projections, sustainer signups versus one-time gifts, calls versus pledge letters versus emails, performance analysis reports and a budget tracker throughout each campaign and annually for the telemarketing program.

Subtask 2.5 in support of Task 2: Agency must submit invoices through USO's preferred invoice payment system.

Task 3: Agency ensures high quality control of the telemarketing sustainer program.

Subtask 3.1 in support of Task 3: Complies with applicable charitable fundraising requirements and files necessary state registrations and notices in a timely manner. Must have the ability to accept donations via phone and be PCI and TCPA compliant.

Subtask 3.2 in support of Task 3: Maintains exceptional data management and hygiene including: do not call records, telemarketing responsive files, phone append services, email address collection, suppression of required Do Not Call lists and USO provided files as well as capture, record and store cell phone consent.

Subtask 3.3 in support of Task 3: Agency conducts effective training of outbound communicators to ensure protocols and scripts are followed to maintain the projected calls per hour. Callers must adhere to USO's brand and values while being passionate about the organizations' mission. Provides an excellent telephone experience to donors, leaving them feeling appreciated and valued for their support whether they make a gift or not. Although scripted, the calls should sound natural and conversational, not be overly aggressive, and prioritize the donors' wishes.



Subtask 3.4 in support of Task 3: Use FTP site for secure file transfers and accommodate import/export file layouts when providing completed calls, pledge updates, corrections for name/address/phone/email, removals with reasons, refusals, solicit code requests, etc. RFP should include detailed processes for sending data back to the USO.

Subtask 3.5 in support of Task 3: Enters credit card donations into an online pledge form and, if required in the future, work with USO to build an API (application programming interface) to use for credit card capture/transfer and processing of donations.

Subtask 3.6 in support of Task 3: Throughout each campaign, Agency monitors callers for quality control and allows the USO to participate in call monitoring (through live calls and/or reviewing recorded calls). A call mitigation strategy/process is required to handle complaints.

Task 4: Agency supports weekly thank you calls to Mid-level donors giving \$1,000 or more

Subtask 4.1 in support of Task 4: Accepts and processes data files containing Mid-level donors that have recently donated and conduct top-quality thank you calls to those individuals. Manages any requests/changes from donors, as necessary.

Subtask 4.2 in support of Task 4: Provides effective training of telemarketers to ensure positive, inspiring, meaningful calls are made to the USO's valuable Mid-level donors.

Subtask 4.3 in support of Task 4: Ensures the quality control requirements listed above in applicable Task 3 and subtasks are followed for the Mid-level audience.

Subtask 4.4 in support of Task 4: Provides reporting on calls made to and the feedback received from Mid-level donors. Monthly return of data file of callers reached is sent to USO data vendor for upload.

Task 5: Agency provides on-demand voice broadcast capabilities in tandem with USO direct mail appeals.

Subtask 5.1 in support of Task 5: Creates effective scripting for voice broadcasting initiatives that maximizes performance of direct mail appeals.

Subtask 5.2 in support of Task 5: Provides recording tools to support voice broadcast efforts. RFP should include details behind what the Agency offers and the tools' capabilities.

Subtask 5.3 in support of Task 5: Provides phone append services for files received and sends new/changed information back for upload into the USO database.

Subtask 5.4 in support of Task 5: Manage all aspects of the distribution of voice broadcast to USO donors ensuring timelines are met and regulations are followed.

Subtask 5.5 in support of Task 5: Provides reporting and performance updates/analyses from voice broadcasting efforts with recommendations for improvement and ways to leverage the program to increase results.



TECHNICAL AND MANAGEMENT PROPOSAL

Describe a plan to provide, prioritize, and manage the tasks and subtasks included in the Scope of Work. Describe the knowledge, experience, and capabilities related to provision of the range of telemarketing services described.

Include the following in your Request for Proposal:

- Pricing per calling type
- Budget and projections, based on estimated file quantities above
- Calling approach and strategy
- Communicator hiring, training, and monitoring processes
- Sample scripts and messaging, process for creating scripts, and options for customization
- Approach to balancing call volume goals with the donors' desire to chat during a fundraising call
- Quality control processes for calls and data
- Call samples and an explanation of your call policy including how long call recordings are saved and availability upon request of specific calls
- Fulfillment processes description and samples of fulfillment letters and emails
- Methodology for processing gifts and sending donor data back to USO
- Sample data files
- Sample campaign reports and analyses
- Description of the verticals that you work with and the numbers of each (non-profits, for-profits and how many of each)
- Approach to client management and bios of your proposed Account Team as well as other staff that would work with the USO (include an organization chart with operations and call center)
- Estimated number of callers that would be assigned to the USO or how this will be determined
- Overview of the timeline to launch a campaign with you, including major milestones, deliverables, and timelines
- Invoicing and billing process
- Description of additional services that you can offer, not included in the RFP
- A copy of your standard contract with terms and conditions

Statement of Understanding

- State a clear understanding of the mission of the USO and this project.
- Maximum length: 1 page

Technical and Management Approach/Plan/Solution

- Describe your proposed approach to each requirement/task included in the Scope of Work.
- Describe the plan for organizing and managing the tasks required by the SOW.
Indicate how roles and responsibilities will be divided, decisions are made, work is monitored, and quality and timeliness are assured.
- Maximum length: 10 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 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.

Corporate Qualifications

The work described in this RFP must be performed with exceptionally high-quality standards. It is essential that the Agency 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 Agency must also be able to organize and manage resources and personnel effectively.

- Describe projects that are currently being managed by the proposed staff and the biggest challenges facing your company.
- Provide a discussion of directly relevant technical and substantive experience, including a list of prior or similar projects, and what sets your company apart from your competitors.
- Describe the most exciting projects your team is working on to improve the quality and effectiveness of your services and overall success of your company.
- Include your overall philosophy/approach to regulatory compliance and how you assure compliance at all levels of your company. Also include what efforts you have in place to mitigate the risk of a ransomware attack.
- Maximum length: 5 pages

Past Performance

The Agency should be able to 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.

- Identify existing projects, or projects completed, within the last five years that are consistent in scope, nature, and effort for non-profit and/or for-profit clients. Include the number of sustainer, Mid-level and voice broadcasting programs currently or previously managed and how large/small they are/were in terms of revenue and quantities.
- If you have lost any clients in the past five years, include the reason(s) why.
- If you have been a subject of any state or federal regulatory action in the past 10 years? If so, please describe.



Cost Proposal

- Provide a quote in table form that supports the entire Scope of Work with all expected expenditures and fees (including pass through fees like postage). The quote should list key services and materials with corresponding prices. Agency should break out costs by each task/heading within the project to include key personnel working on the project.
- **Brief budget narrative** (no more than 2 pages) may be included to specify budget items or calculations.

TERMS AND CONDITIONS

Coupa Sourcing Management Software

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

Furnishing of Equipment/Property

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

Place of Performance

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 Agency is required to provide the facilities necessary to execute the SOW. The Agency shall choose its staff or acquire the necessary personnel support and provide suitable work facilities.

Hours of Service

The Agency shall be available Monday through Friday, between 8:30 am and 5:30 pm (ET). USO has regular observance of federal holidays: New Year's Day; Birthday of Martin Luther King, Jr.; Washington's Birthday; Memorial Day; Juneteenth; Independence Day; Labor Day; Veterans Day; Thanksgiving Day; Day after Thanksgiving Day and Christmas Day.

Insurance

The Agency, at its own expense, shall provide and maintain the general liability insurance in support of an awarded contract for the entire duration, with \$1 million minimum coverage and up to \$3 million or at a level required and relevant to the project requirements. The Agency assumes absolute responsibility and liability for any and all personal injuries or death and/or property damage or losses suffered due to negligence of the Agency's personnel in the performance of the services required under this contract.

Non-Disclosure Agreement

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



Organizational Conflict of Interest

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

Compliance

Upon the request of employees or other persons with disabilities participating in official business, the Agency must arrange necessary and reasonable accommodations for the impaired individual(s) per Section 508 of the Rehabilitation Act of 1973, as amended (29 U.S.C. § 794 (d)).

Quote Evaluation Criteria

The USO will evaluate proposals in compliance with the Scope of Work and requirements stated in this RFP. An award may be made to the Agency who proposes the best overall value for the USO as determined by USO in its sole discretion. The USO will consider the evaluation factors indicated below. See Submission Guidelines (below) for a description of the categories.

The USO reserves the right to reject proposals that are unreasonable low or high in price.

The price will be determined regarding the ability of the Agency to fulfill the requirements listed in the Scope of Work. In Coupa Sourcing, the Scope of Work is split out under forms: 1.) Technical Solution 2.) Management/Strategic Approach 3.) Corporate Qualifications 4.) Past Performance.

Category	Weight of Rating Factor
Technical Solution	25%
Management/Strategic Approach	25%
Past Performance	25%
Cost	25%

The USO will assign the following evaluation scores:

- **Outstanding** – The Agency has demonstrated that there is a high probability of success in a combination of past results, low risk, and professional distribution of services.
- **Good** – The Agency has demonstrated that there is a good probability of success in a combination of past results, moderate risk, and professional distribution of services.
- **Fair** – The Agency has demonstrated that there is marginal probability of success in a combination of past results, marginal risk, and professional distribution of services.
- **Poor** – The Agency has not demonstrated that there is a reasonable probability of success in this services-based effort.



Submission Guidelines

The USO utilizes **Coupa Sourcing** for all Vendor Bidding

Acceptance of Coupa Sourcing Event

- Click on the link provided in the email invite from Coupa Sourcing
- Download **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
 - Tasks 1-5
 - Technical Proposal
 - Management Plan
 - Proposed Project Team
 - Corporate Qualifications
 - Past Performance
 - Cost Proposal

Cost (Items)

- **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 January 27, 2023. 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

After receiving the original proposals, USO reserves the right to notify all technically acceptable agencies within the competitive range and to provide them an opportunity to submit written best and final offers (BAFOs) at the designated date and time. This will be done through Coupa Sourcing "Messaging" tool.

BAFOs shall be subject to the late submissions, late modifications, and late withdrawals of proposals provision of this RFP. After receipt of a BAFO, no discussions shall be reopened unless the USO determines that it is in the USO's best interest to do so (e.g., that information available at that time is inadequate to reasonably justify Agency selection and award based on the BAFOs received). If discussions are reopened, the USO shall issue an additional request for BAFOs to all technically acceptable agencies still within the competitive range.

At its discretion, the USO reserves the right to also invite agencies who are technically acceptable to make a presentation to the USO on the proposed effort for technical and management approaches identified in the submission. The USO will notify agencies who meet the qualifications and provide the date, time, and format for the presentation.

This RFP does not commit the USO to engage in any business transactions or enter into any contractual obligations with agencies.

Retention of Proposals

All proposal documents shall be the property of the USO, retained by the USO, and not returned to the agencies.

Post-Award Information

Anticipated Award Date

The anticipated notice of award date is February 10, 2023.

Post-Award Conference/Kickoff Meeting

Upon notice of award, the USO will coordinate an award kickoff meeting within 7 days with the Agency. The date, time, and location will be provided at the time of the award.

Notice to Proceed

Immediately upon receipt of notice of award, the Agency shall take all necessary steps to prepare for performance of the services required hereunder. The Agency shall have a maximum of 10 calendar days to complete these steps.



Following receipt from the Agency of acceptable evidence that the Agency has obtained all required licenses, permits, and insurance and is otherwise prepared to commence providing the services, the USO shall issue a Notice to Proceed.

On the date established in the Notice to Proceed (this notice will allow a minimum of seven calendar days from the date of the Notice to Proceed unless the Agency agrees to an earlier date), the Agency shall start work.

Period of Performance

The performance period of this contract is from the start date established in the Notice to Proceed and continuing as long as the USO and Agency both agree that the relationship and services provided are mutually beneficial. The initial period of performance includes any transition period authorized under the contract.

Documentation Requirements

The telemarketing Agency may be required to provide documentation to support its legal ability to operate facilities in the United States.

Basis of Compensation to the Vendor

The USO expects to award a Services and Materials contract for the SOW and budget that is proposed; negotiated with the USO during the contract award or the Best and Final Offer process; and listed in the agreement executed between the organizations. Any Agency quality issues that result in the re-drafting of work or increased labor required to meet deliverables during the performance of the contract are the financial responsibility of the Agency, and re-work will be done at the Agency's expense.

Billing and Payment Procedures

The USO currently utilizes electronic invoicing. Invoices shall be provided to the USO on a monthly basis by submission to "Coupa Supplier Portal". Instructions on accessing the portal will be provided post-award.

Debrief – Post-award

The agencies not selected may receive a post-award debriefing provided a written request is submitted to procurement@uso.org 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 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			