CRM Implementation & Modernization

REQUEST FOR PROPOSAL

Document Reference USO-EnterpriseCRM2024

March 8, 2024

KEY DATES	
RFP Posted Online	March 8, 2024
Request for Proposal Released	March 15, 2024
Deadline for Questions	March 22, 2024
Q&A Shared with all Vendors	March 29, 2024
Deadline for Proposals	April 26, 2024
Down select Notification	May 3, 2024
Target Week for Presentations	May 13 – 17, 2024
Projected Award Date	May 24, 2024
Projected Start Date	June 10, 2024

After reviewing this document, if you wish to participate in the RFP, please download and complete the RFP Vendor Participation Request Form prior to the Release date.

Once the RFP has been released, we can no longer accept new vendors to participate.

*Please note, you must download the request file and open with Adobe. It will not function properly if opened in your web browser.

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ABOUT THE USO

For the people who serve. Since 1941, the United Service Organizations, Inc. ("USO") — a private, nonprofit organization — has served the people 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 a public charity and not part of the federal government.

We are a family of dedicated staff and 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 worldwide, increasing annual service connections, and boosting transition services for our service members and their families throughout their time of duty. Our service members will know that the USO is always by their side, in every corner of the world.

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

BACKGROUND

In 2020, the USO initiated a new Strategic Plan. One of its pillars, "Digital Transformation", has the goal of enabling the organization to strengthen every aspect of its work— service delivery, fundraising, marketing, and workforce development— by creating a digital, data-driven set of integrated tools and processes. Our vision is to create the best customer experience, foster resiliency among our service members and their families, and invite all Americans to join their service journeys.

We seek to maximize our service delivery, expand our reach, and facilitate impactful interactions with service members and their families to better understand and meet their current and future needs. To be successful, we must be able to address those needs in a timely and relevant fashion.

The USO is currently challenged to provide a 360-degree holistic view of our constituent base, particularly current and prospective donors. Additionally, we have the opportunity to reimagine how we serve and deliver to service members and their families from the ground up through the implementation of an enterprise constituent relationship management ("CRM") platform using the Salesforce Nonprofit Cloud.

A successfully deployed and user-adopted enterprise CRM platform will:
- Increase fundraising revenue through a better understanding of USO supporters and the ability to create a personalized donor engagement strategy and journey
- Reduce information silos across the organization, creating an improved data flow across fundraising, mission delivery, and volunteer programs that report key metrics more quickly
- Enable dashboard and reporting features that eliminate manual data analysis and release staff effort from administrative activities and allow for greater growth in constituent relationships
- Decrease weeks-long timelines for distilling captured data to insights and answer strategic questions with access to vital information sooner
- Enhance the personalized approach to mission delivery that empowers the USO to reach more service members and families in impactful ways with our best-in-class services.

PROJECT SUMMARY

The USO is seeking proposals from qualified software application integrators (the "Bidder") for the implementation of enterprise-capable Constituent Relationship Management ("CRM") using components of the Salesforce Nonprofit Cloud, creating a 360-degree and holistic view of customers, donors, and volunteers. The proposed solution will include, but is not limited to, the software, training, documented processes, and all components required to provide a fully functional and sustainable system.

The Bidder should be experienced in nonprofit management and with the needs and requirements of a nonprofit our size and have a comprehensive knowledge of the software application(s). Our goal is to reduce information silos across the organization, remove manual reporting and data analysis, decrease the manpower required to gather relevant data, and increase USO's ability to create personalized engagement strategies across our stakeholder base by adopting a comprehensive software application solution in accordance with the terms and conditions set forth in this Request for Proposal ("RFP").

The USO has included within this RFP document a list of high-level requirements and specifications for the solution along with guidelines for submitting a proposal. All services noted in this proposal are considered by the USO to be within the capacity of any full-service software vendor. No requirement and specification should be construed as an attempt on the part of the USO to limit competitive bidding. However, the possibility exists that a particular requirement and/or specification may potentially eliminate one or more prospective Bidders.

The USO conducted staff interviews, best practice research, and analysis of current tool limitations to determine the following high-level needs of our future enterprise CRM:

360 constituent view

A new CRM needs to provide a 360-degree constituent view to allow the USO to see all interactions with the USO.

Personalized Journeys

A new CRM needs to provide different journeys for different types of donors and different types of programs.

Automated Processes

A new CRM needs to include automated processes to save USO staff time. Automated processes include but are not limited to automatic emails and SMS messages.

Easy to use

To support staff uptake and usage, a new CRM would need to be intuitive to use and learn.

One CRM

A new CRM needs to meet the needs of the entire USO accommodating the requirements of different departments, while consolidating the skills required for support

Easy Reporting

A new CRM needs to provide easy to use reporting and dashboards, as well as an integration with PowerBI, to provide insights into USO outcomes.

Integration with some current systems

To minimize disruption, a new CRM would need to integrate with mission-critical current systems.

Standard Security Requirements

The platform would need to meet standard security requirements to protect USO data. This includes encryption and role-based access to ensure proper levels of data access.

Additionally, the scope of functionality may include the following, at a minimum:

Function	Requirements
Data	- Scale to support more than 6 million active contact records - Manage a gift volume of more than 1.6 million annual gifts and approximately 13 million historical gift records - Scale to support 20-50 million opportunity records - Have core fields, regardless of contact type - Include a reporting tool for operational tracking while also supporting integration with the Microsoft Azure USO Data Lakehouse and other USO tools for analytics - Have specific fields for each contact type - Support the ability to include custom fields and/or label unassigned fields that are unique to USO needs
Fundraising	- Track fundraising/donor amounts and the source of donation (web, check, etc.) - Keep and display a record of communications sent to donors (across multiple communications channels) - Include records of known prospects prior to their first gift (including the source of lead generation) - Track and manage recurring gifts - Track donor interests - Include Moves Management and Portfolio management tracking and reporting to measure fundraising progress and success. - Include Constituent Contact Reporting to measure meaningful and strategic activities. - Indicate on a donor profile if they are a USO volunteer - Include the ability to indicate if a donor is a veteran - Include the ability to indicate that a donor used USO services/programs as a service or family member - Provide the capability for donors to be linked to family units and/or corporate accounts (household level vs the individual level) - Track different donor types by constituency coding (individual vs. organizations) - Provide for log of in-kind donations pledged and received by donor, maintenance of a catalog of values for recurring types of products, and reporting on in-kind activity. - Record and track donor participation in events - Track if donations were made for specific programs (restricted) or as a result of specific campaigns - Allows for automated workflows for donor onboarding - Allows for automated workflows for fundraising staff onboarding/offboarding - Automated workflows to track and manage recurring gifts - Support grant management, from application to award to stewardship/impact reporting

Communications	• Track whether users have opened USO communications across channels (email, SMS, etc.) • Support SMS and push notifications for urgent communications • Include constituent contact information • Track communication preferences • Support custom email templates to align with USO brand • Support the automation of constituent marketing through multiple channels • Support the automation of failed payment messaging for recurring donors • Send automated personal and thoughtful messages (e.g., Birthday or Service Anniversary emails or texts)
Integration	• Include capabilities for email marketing • Integrate data with the USO Data Lakehouse (Azure) • Integrate data with the USO Volunteer Management System (Digital Cheetah) • Integrate with USO Mobile Application/Digital Experiences • Integrate with Content Management System (USO.org) • Integrate with Stripe to read payment, customer, and subscription data • Allow for bulk uploads of data • Integrate with a backup/recovery tool • Ensure data synchronization across platforms (Customers, Leads, Donors, Volunteer) • Provide flexible API integration for external partners and/or applications
Platform	• Support personalized donor/customer journeys using AI-driven insights • Holistic gift-processing functions to support donor segmentation and acknowledgement, including the unique requirements of in-kind acknowledgment • Support multi-channel marketing campaigns (email, social, web, etc.) • Ensure compliance for marketing communications (e.g. GDPR and state-level requirements) • Provide a 360-degree view of each constituent, capturing all interactions • Allow for creation of personalized dashboards • Provide regular updates without disrupting user experience • Support role-based dashboards for different staff roles • Ensure high availability, especially during peak fundraising events • Offer personalized content and experiences for users • Support community forums for engagement • Allow for each content updates • Segment constituents for targeted outreach • Design and automate personalized donor journeys • Monitor and engage with social media mentions related to USO • Maintain functionality for service members and their families to register for USO programs

	• Enable internal collaboration among USO staff
Security	• Provide granular access controls to records (i.e. read/ write) • Allow for role-based access to certain fields • Allow for encryption of sensitive data • Encrypt any interactions • Encrypt data storage • Integrate with authentication providers (i.e. Azure AD) for single sign-on and multi-factor authentication
Self-Service Constituent Portal(s)	• Include a self-service constituent portal that provides profile specific (donor, service/family member) capabilities • Allow constituent to update their contact information • Allow constituent to indicate communications preferences • Allow donors to access tax documents • Allow donors to update recurring donations, make additional donations, and/or access their donor giving history

PURPOSE

The USO expects to make one award under this RFP. The period of performance is as proposed by the vendor and agreed to by USO, to accomplish the stated USO goals and requirements.

The anticipated contract award date is approximately **05/24/2024**.

The successful bidder will present a proposal for project management, technical approach, and change enablement that clearly demonstrates how vendor execution enables the USO to achieve the following success metrics, among others:

- Increased engagement - In 2022, the USO served 787k unique service members and spouses. We will struggle to achieve our current 2026 goal of serving 1 million unique individuals (a ~25% increase over three years) under our legacy systems. After completion of the enterprise CRM, we estimate we can double the number of unique served in 2026 (~1 million) by the end of 2030 (~2 million).
- Return rate (to centers and programs) - By the end of Q3 2023, the average number of visits per person was 5. Continued modernization increases visibility and usage tracking across programs and services and allows USO to make better recommendations throughout the military service journey.
- Staff efficiencies - Decrease administrative time; based on current user feedback, we believe that a modernized database will redirect more than 54,000 annual staff hours from administrative time spent recording data to service-member facing mission delivery.
- Increased revenue - Similar-sized organizations have experienced increases in fundraising revenue through an increase in donor retention, donor value, and new donor conversion following the implementation of enterprise CRM with the ability to target more specialized segments with personalized messaging.
- Employee adoption and experience – Monitoring employee logins, service desk ticket submission, creation of dashboard/reports, and training attendance we will expect to see stable increases in employee adoption following go-live. Additionally, we expect that a successful platform will result in an increase in the bi-annual employee experience survey score for "Do you feel you have the tools you need to do your job effectively?"

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 the RFP.

Submission Deadline

All proposals must be submitted no later than 5 pm (ET) on **4/26/2024**.

SCOPE OF WORK (SOW)

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

Tasks and Subtasks

1. **Task 1- Project Management**

The Vendor will provide project management support throughout the lifecycle of the project. This includes the management and oversight of all contractor activities to satisfy the requirements identified in this SOW, communications, coordination with USO stakeholders, financial tracking, and periodic reporting.

The contractor shall identify a Project Manager ("PM") by name, who shall serve as the primary interface and point of contact with the USO-assigned project manager.

Task 1 for this project shall include the following subtasks:

1. Subtask 1.1 <u>Kickoff Meeting.</u> Coordinate and conduct a project kickoff meeting, including but not limited to the following topics.

   a. Introduction of team members and personnel involved with the project delivery including roles and responsibilities.
   b. Overview of understanding of the objectives of the project.
   c. Overview of notional project timeline with identification of critical path highlighting dependencies on USO staff for successful implementation.
   d. Communication plan.
   e. Risk assessment of top project risks including proposed risk mitigation highlighting areas of assistance needed from USO.
   f. Projected project financial burn line from kickoff through project completion.

2. Subtask 1.2 <u>Weekly Progress Report.</u> Provide weekly progress summary in Microsoft Word or PowerPoint form, including but not limited to the following:

   a. Summary of activities completed in the previous week.
   b. Planned activities for the following week.
   c. Upcoming key project milestones.
   d. Newly identified risks.
   e. Questions or concerns requiring USO response and action.

3. Subtask 1.3 <u>Monthly Progress Report and Meeting.</u> Provide monthly progress summary, including but not limited to the following:

   a. Summary of accomplishments in the previous month.
   b. Progress relative to project schedule with updated revised dates and explanation of changes to project schedule as needed.
   c. Projected activities for the upcoming month.
   d. Financial status including expenditures to date relative to projected burn line and estimated burn to completion.

4. Subtask 1.4 <u>Risk Management</u>. Define and execute a risk management plan communicating the risks, mitigation strategies, and (if applicable) resolution plan for issues.

   a. Identify and document the risks to successful project completion. Documentation to include the probability and impact of the identified risks

   b. Develop mitigation strategies to minimize the probability of occurrence

   c. Monitor and manage the risks throughout the lifecycle of the project

2. Task 2 – Discovery & Design of CRM Data Architecture

Demonstrating technical knowledge of current systems, the Salesforce Nonprofit Cloud, and using the methodology of their choice, the vendor shall initiate a discovery and design phase that identifies the CRM data architecture necessary to achieve a comprehensive and actionable view of constituents throughout their USO-interaction journey. That design shall consider, but not be limited to, role-based access requirements, cross-department and individual business unit reporting, and the people/process enablement necessary for long-term application success.

Task 2 for this project may include the following subtasks and associated deliverables:

1. Subtask 2.1 – <u>Data Access</u>
   a. User roles and data access needs
   b. System configuration in terms of profiles, permission sets, apps, and other Salesforce-specific elements used to manage access to data and features
   c. Data encryption configuration
   d. Required authentication mechanisms
   e. Compliance with USO's and Salesforce's security requirements
   f. Procedure for requesting, approving, granting, and revoking user access on an ongoing basis
2. Subtask 2.2 – <u>Data Model</u>
   a. Database(s) design, both conceptual and physical
   b. Data definitions and shared vocabulary: business glossaries, data dictionaries, etc.
   c. Core/business-unit specific constituent data elements
3. Subtask 2.3 – <u>Data Integration</u>
   a. Data flows for data production, processing, storage, and consumption of data
   a. Integration/data sharing with other systems
4. Subtask 2.4 - <u>People/Process Enablement</u>
   a. O&M personnel needs
   b. Confirmation of data governance & stakeholder RACI
   c. Business, data, and technical ownership
   d. Process, skill, mindset, literacy, collaboration needs for ongoing CRM success

3. Task 3 – Implementation of Donor Relationship Management

The USO Development & Marketing team utilizes four primary and many secondary CRM-like applications to house, manage, and analyze donor data. Primary applications include Raiser's Edge NXT, Direct Mail Database (DMDB), a .NET in-house portal for credit card transactions and source code management (CCTrans), and a vendor-provided email acquisition and marketing platform (HUB). These disconnected legacy applications are largely designed to support specific fundraising channels and, despite efforts to improve data integration, provide limited visibility to the full story of a donor's support for and interaction with the USO.

Demonstrating knowledge of fundraising strategies, technology, and best practices, the vendor shall use the methodology of their choice to conduct the requirements gathering, implementation, and testing necessary to consolidate current donor relationship/fundraising data platforms to a single Salesforce instance.

Task 3 for this project may include the following subtasks and associated deliverables:

1. Subtask 3.1 – Requirements Analysis and Design. Conduct workshops and interviews with key stakeholders across the Major Gifts, Planned Giving, Corporate Alliances, Direct Response, Events Management, Volunteer Management, Marketing, Development Operations, Operations, and Finance teams to gather CRM requirements.
    a. Document the functional and non-functional requirements
    b. Prioritize requirements based on business needs of the stakeholder groups
    c. Define automated processes to support the identified requirements and milestones of donor journeys
    d. Design the Salesforce Nonprofit Cloud components necessary to meet the identified requirements and align with business needs
2. Subtask 3.2 – Data Migration. Conduct an assessment of current data quality and completeness, the future process needs to be supported by donor data, and plan to migrate relevant data to the new enterprise CRM platform.
    a. Develop a data migration strategy
    b. Execute the data migration tasks according to the approved plan
    c. Validate the migrated data to ensure accuracy
3. Subtask 3.3 – Salesforce Setup/Implementation. Complete the configuration and testing necessary to implement the approved application design.
    a. Configure the Salesforce Nonprofit Cloud components according to the approved design
    b. Develop customizations, as necessary, to support identified functional and non-functional requirements
    c. Configure/Build integration to external applications as necessary to meet business needs
    d. Conduct testing to configuration and customization work as designed to meet the approved business requirements
4. Subtask 3.4 – Documentation and Knowledge Transfer. Support the long-term success of the platform through the completion of functional and technical documentation that will be used in ongoing operations and maintenance.
    a. Document the configuration and customization steps taken to implement the approved platform
    b. Conduct knowledge transfer, data integration toolset, and CRM administration training sessions with functional application owners, the Development Operations team, and internal USO Salesforce administrators
    c. Document lessons learned and post-implementation modifications to inform future modernization/enhancement efforts

4. Task 4 – Modernization of Mission Delivery Relationship Management

The USO Operations, Programs, and Entertainment (OP&E) team currently utilizes two Salesforce instances (SPARTAN and Transition) daily to enter, track, and analyze mission delivery. The current system is USO-centric, not customer-centric. It forces our OP&E data team to undertake the time-consuming task of weaving together disparate data and business practices across multiple data sources.

Demonstrating technical knowledge of current systems, the Salesforce Nonprofit Cloud, and using the methodology of their choice, the vendor shall conduct the requirements gathering, implementation, and testing necessary to consolidate the two Salesforce instances currently supporting mission delivery and to modernize service/family member relationship management.

Task 4 for this project may include the following subtasks and associated deliverables:

1. Subtask 4.1 – <u>Requirements Analysis and Design</u>. Conduct workshops and interviews with key stakeholders across the Operations, Programs, Global Entertainment, Transition, Regional/Center, Customer Marketing, and Finance teams to gather CRM requirements.
   a. Document the functional and non-functional requirements
   b. Prioritize requirements based on business needs of the stakeholder groups
   c. Define automated processes to support the identified requirements and milestones of donor journeys
   d. Design the Salesforce Nonprofit Cloud components necessary to meet the identified requirements and align with business needs
2. Subtask 4.2 – <u>Data Migration</u>. Conduct an assessment of current data quality and completeness, the future process needs to be supported by mission delivery data, and the plan to migrate relevant data to the new consolidated mission delivery platform.
   a. Develop a data migration strategy
   b. Execute the data migration tasks according to the approved plan
   c. Validate the migrated data to ensure accuracy
3. Subtask 4.3 – <u>Salesforce Setup/Implementation</u>. Complete the configuration and testing necessary to implement the approved application design.
   a. Configure the Salesforce Nonprofit Cloud components according to the approved design
   b. Develop customizations, as necessary, to support identified functional and non-functional requirements
   c. Configure/Build integration to external applications as necessary to meet business needs
   d. Conduct testing to configuration and customization work as designed to meet the approved business requirements
4. Subtask 4.4 – <u>Documentation and Knowledge Transfer</u>. Support the long-term success of the platform through the completion of functional and technical documentation that will be used in ongoing operations and maintenance.
   a. Document the configuration and customization steps taken to implement the approved platform
   b. Conduct knowledge transfer sessions with functional application owners and internal USO Salesforce administrators
   c. Document lessons learned and post-implementation modifications to inform future modernization/enhancement efforts

5. **Task 5 – Comprehensive Change Management**

Using the methodology of their choice, the vendor shall develop and execute a comprehensive change management strategy that spans the phases of the CRM implementation project to provide awareness, gain commitment, execute training, and facilitate the adoption of the new platform across stakeholder groups.

Task 5 for this project may include the following subtasks and associated deliverables:

1. Subtask 5.1 – <u>Change management strategy and communications</u>. The vendor shall provide a change management strategy that includes identification of all impacted stakeholder groups, steps to address change readiness and user adoption, stakeholder readiness assessment, and communications plan including draft communications materials to accomplish sufficient awareness to ensure adoption and full utilization of the deployed system. The strategy will include all USO stakeholders impacted by the system as well as the projected impact on external stakeholders.
2. Subtask 5.2 - <u>User training</u>. The vendor shall prepare and deliver user training materials and conduct initial delivery of the user training. The training materials will describe all user capabilities and be delivered in a format that can be updated with subsequent system changes. In addition, the training will be delivered in a format that will support retraining with employee turnover. The combined artifacts will describe the end-to-end functionality of the system including reports and dashboards.
3. Subtask 5.3 – <u>Future Opportunities Roadmap</u>. The vendor shall provide a backlog of any identified requirements not prioritized by the business units for implementation with this effort. Documentation shall include the vendor's proposed roadmap for future implementation of these requirements and recommendations based on industry best practices.

KEY DELIVERABLES

The Vendor shall provide the following deliverables according to the tentative time frames identified in the tables below. Final time frames will be negotiated post-award between the Vendor and the USO.

SOW and/or Task-Specific Deliverables	Timing
1. Subtask 1.1 – Project kickoff meeting presentation – including but not limited to the elements listed in Task 1.1	Within two weeks of award
2. Subtask 1.2 – Weekly Progress Report - Provide weekly progress summary, including but not limited to the elements listed in Subtask 1.2	Friday of each project week
3. Subtask 1.3 – Monthly Progress Report – Provide monthly executive progress summary, including but not limited to the elements listed in Subtask 1.3	Within 5 business days of the first of the month
4. Subtask 1.4 – Risk Management – Provide, and update on at minimum a monthly basis, a listing of project risks, to include the probability, impact, mitigation activities, and any risks that have become issues	Initial delivery within 3 working days of the project kickoff presentation, updated monthly at a minimum
5. Task 2 – CRM Data Architecture – including but not limited to the data access, data model, data integration, and people/process enablement elements listed in subtasks 2.1 through 2.4	Upon completion of Task 2
6. Subtask 3.1 – Donor Relationship Management requirements gathered from the workshops/interviews with key stakeholders from Subtask 3.1 and the Salesforce Nonprofit Cloud design necessary to meet those requirements	Upon completion of Subtask 3.1 and prior to the start of Subtask 3.3
7. Subtask 3.2 – Data Migration strategy and plan to populate the future donor relationship management system with relevant donor and gift data	As proposed
8. Subtask 3.3 – Configuration and testing of the Salesforce Nonprofit Cloud design approved by USO in Subtask 3.1	As proposed

9. Subtask 3.4 – Documentation and knowledge transfer including, but not limited to, the elements listed in Subtask 3.4	As proposed
10. Subtask 4.1 – Mission Delivery Relationship Management requirements gathered because of the workshops/interviews with key stakeholders from Subtask 4.1 and the Salesforce Nonprofit Cloud design necessary to meet those requirements	Upon completion of Subtask 4.1 and prior to the start of Subtask 4.3
11. Subtask 4.2 – Data Migration strategy and plan to populate the future mission delivery relationship management system with relevant mission delivery data	As proposed
12. Subtask 4.3 – Configuration and testing of the Salesforce Nonprofit Cloud design approved by USO in Subtask 4.1	As proposed
13. Subtask 4.4 – Documentation and knowledge transfer including, but not limited to, the elements listed in Subtask 4.4	As proposed
14. Subtask 5.1 – Change management strategy – Identification of impacted stakeholder groups, change readiness assessment of those stakeholder groups, steps to address change readiness and user adoption, and the schedule and types of communications to accomplish awareness and adoption	As proposed
15. Subtask 5.2 – User Training – User training materials containing, but not limited to, the elements described within Subtask 5.2	As proposed
16. Subtask 5.3 – Future Opportunities Roadmap – Backlog of identified requirements not prioritized for implementation, proposed roadmap for future delivery of the backlogged requirements	As proposed

SOW DETAILS FOR PROPOSAL SUBMISSION

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

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

Management 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 ensure 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 the 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 the planned usage of subcontractors

Corporate Qualifications

The work described in this RFP must be performed quickly and meet exceptionally high-quality standards. It is essential that the Vendor demonstrate the technical and subject-matter expertise to design and conduct the activities described in the Scope of Work and to put qualified staff in place to begin work rapidly. The Vendor must also have the ability to organize and manage resources and personnel effectively.

- Describe partnerships with relevant current and future applications that will contribute to the successful achievement of USO business success metrics for this project
- 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 fundraising or volunteer management clients, or local, state, or federal governments.
- Complete the table in Appendix A.
- For each selected project, submit a synopsis of work performed (no longer than two pages). Provide information on problems encountered on the contracts and subcontracts and corrective actions taken to resolve those problems. Do not provide general information on performance on the contracts because we will obtain that information from the references.

Cost Proposal

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

Sample templates for labor category and rates:

- **Pricing by Task**

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

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

- **Pricing by Key Personnel**

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

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

TERMS AND CONDITIONS
Coupa Sourcing Management Software

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

Furnishing of Equipment/Property

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

Place of Performance

With the exception of travel and/or specific requirements as outlined in the RFP that relate to the Scope of Work and/or Task Deliverables, the Vendor must 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 regularly observes federal holidays: New Year's Day; Birthday of Martin Luther King, Jr.; Washington's Birthday; Memorial Day; Juneteenth; Independence Day; Labor Day; Veterans Day; Thanksgiving Day; Day after Thanksgiving Day and Christmas Day.

Insurance

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

Non-Disclosure Agreement

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

Organizational Conflict of Interest

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

Compliance

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

PROPOSAL EVALUATION CRITERIA

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

The USO reserves the right to reject proposals that are 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.

Category	Weight of Rating Factor

Technical Solution	30%
Management Plan & Approach	30%
Past Performance	20%
Cost	20%

The USO will assign the following evaluation scores:

- **Outstanding** – The Vendor has demonstrated a high probability of success in a combination of past results, low risk, and professional distribution of services.

- **Good** – The Vendor has demonstrated a good probability of success in a combination of past results, moderate risk, and professional distribution of services.

- **Satisfactory** – The Vendor has demonstrated a moderate probability of success in a combination of past results, moderate risk, and professional distribution of services.

- **Fair** – The Vendor has demonstrated that there is a marginal probability of success in a combination of past results, marginal risk, and professional distribution of services.

- **Poor** – The Vendor has not demonstrated that there is a reasonable probability of success in this services-based effort.

SUBMISSION GUIDELINES

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

Acceptance of Coupa Sourcing Event
- Click on the link provided in the email invite from Coupa Sourcing
- Download **Coupa Sourcing Vendor Guide**
- Download and review **RFP Document including the Terms and Conditions**

Attachments
- Download RFP Response Forms

Forms
- Upload completed RFP Response Forms

Items and Services
- Enter cost per task
- Enter the total proposed cost

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

Withdrawal or Modification of Proposals
A Vendor may modify or withdraw its proposal on or before **04/26/2024.** This is done through Coupa Sourcing.

Late Submissions
Late proposals, requests for modification, or requests for withdrawal shall not be considered.

Best and Final Offers

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

BAFOs shall be subject to the late submissions, late modifications, and late withdrawals of proposals provision of this RFQ. After receipt of a BAFO, no discussions shall be reopened unless the

USO determines that it is in the USO's best interest to do so (e.g., that information available at that time is inadequate to reasonably justify Vendor selection and award based on the BAFOs received). If discussions are reopened, the USO shall issue an additional request for BAFOs to all technically acceptable Vendors still within the competitive range.

At its discretion, the USO reserves the right to also invite Vendors who are technically acceptable to present 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 **05/24/2024**

Post-Award Conference/Kickoff Meeting

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

Notice to Proceed

Immediately upon receipt of notice of award, the Vendor shall take all necessary steps to prepare for the 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 the anticipated contract is from the start date established in the Notice to Proceed and continuing for a one-time project-based effort, lasting 12 months or longer as annual contract renewals are possible based on the needs and requirements of the Locations service. 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 type contract for the SOW and budget that is proposed, negotiated with the USO during the contract award or the Best and Final Offer process, and listed in the agreement executed between the organizations. Any Vendor quality issues that result in the re-drafting of work or increased labor required to meet deliverables during the performance of the contract are the financial responsibility of the Vendor, and re
work will be done at the Vendor's expense.

Billing and Payment Procedures

The USO currently utilizes electronic invoicing. Invoices shall be provided to the USO on a monthly basis by submission to the "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.