



## **HISPANIC MARKETING INITIATIVE 2021**

### **REQUEST FOR PROPOSAL**

Document Reference USO-HISPANICMKT2021

March 1, 2021

<b>KEY DATES</b>	
<b>Request for Proposal Released</b>	<b>March 8, 2021</b>
<b>Deadline for Questions</b>	<b>March 22, 2021</b>
<b>Projected Questions &amp; Answers Response</b>	<b>March 29, 2021</b>
<b>Deadline for Quotes &amp; Proposals</b>	<b>April 12, 2021</b>
<b>Projected Award Date</b>	<b>April 19, 2021</b>
<b>Projected Start Date</b>	<b>April 26, 2021</b>



## ABOUT THE UNITED SERVICE ORGANIZATIONS

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

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

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

Although the USO is congressionally chartered and works in close partnership with the Department of Defense, the USO is not part of the federal government. Millions of generous donors, tens of thousands of volunteers and a few hundred employees form the *Force Behind the Forces*. Fueled by the collective impact of this network of military supporters, we go where no other nonprofit organization goes to keep our service members connected to everything that gives meaning to their service.

For more information, visit [www.uso.org/about](http://www.uso.org/about)

**United Service Organizations**  
**2111 Wilson Blvd, Suite 1200**  
**Arlington, Virginia 22201**  
**Phone: (703) 908-5265**



## **PROJECT SUMMARY**

The Vendor selected will lead the USO's inaugural effort to engage and raise brand awareness and understanding of the USO's mission and services among the U.S. Hispanic community. The goal of the proposal is to help the USO serve and support Hispanic audiences, communicate our programs and services by focusing on a thoughtful and authentic internal and external approach. We are aiming to inspire Hispanic service members and their families to acknowledge the USO and encourage them to use our services worldwide in a culturally conscious way. In subsequent years, the USO would build a case for support within our donor engagement strategy with corporate partners and a major gift community.

## **PURPOSE**

The USO expects to make one award under this RFP. The period of performance is **April 26, 2021 – December 31, 2021**. The anticipated contract award date is approximately **April 19, 2021**.

This will be a **Time and Materials contract**. All labor will be delivered through a **Time and Materials contract**. Any related travel expenses required to support the contract if encountered in the course of this contract will be billable on a cost reimbursable basis with no fee. The Vendor will operate at the direction of and receive guidance from the USO.

**Funding for the attached SOW will be between \$400,000 to \$450,000.**

**The USO reserves the right to make no award or to cancel this RFP.**



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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: Discovery: Audit and Research

The Vendor will conduct an audit of existing USO Hispanic Marketing and Communications efforts and garner stakeholder alignment. By starting on the inside, the USO can authentically tell the story to the outside. The Vendor will evaluate what the USO does today to support Hispanic service members and their families and spouses. This includes interviewing internal stakeholders and reviewing communications materials—messaging, brochures, talking points, statements, letters and general information that has been sent out to the Hispanic community—and the frequency with which they are sent. In addition, the Vendor will evaluate the local and national media attention and news coverage the USO has garnered in Hispanic outlets to understand how the organization is covered in the Hispanic media, which will inform the type of media relations and engagement that is required. The Vendor will also evaluate the USO's digital properties to determine what improvements or changes are needed to ensure the USO's message resonates with the Hispanic community. (Note: Vendor should also differentiate between Hispanics of Central American descent and Hispanics of South American descent to understand trends where possible per location.)

Projects may include but are not limited to:

- Subtask 1.1 ..... Internal USO Audit: Internal research of programs, services and USO-owned channels, stakeholder interviews, focus groups and surveys.
- Subtask 1.2 ..... External Audit of Military and USO Correlation/Opportunity: Before the USO embarks on this effort, it is important to fully understand how Hispanics view and perceive the USO's mission and services, and the reach the organization has been able to achieve. For that reason, we request a comprehensive public opinion research. These findings will help guide our messaging and strategy to better reach the USO's needs and goals and consolidate its presence within the Hispanic community. This audit should also include insight into how Hispanics view the armed forces and those serving in the military in addition to the USO.
- Subtask 1.3 ..... Summary Report on Findings and Key Insights

#### Task 2: Strategy and Plan

The Vendor will use the Task 1 Completed Audit and Summary Report to develop an internal and external Hispanic Marketing and Communications Engagement Strategic Plan and presentation. This may include a memo with a plan to showcase the strategy. The plan should have a supporting presentation deck that will be presented at the executive level.



Projects may include but are not limited to:

- Subtask 2.1 ..... Comprehensive Strategic Plan with Ranked Recommendations (Short- and Long-Term) Timeline and estimated Budget: The PDF of the document of the Subtask 2.1 should be provided as an addendum.
  - Note: Please rank the recommendations (high-low priority) and supply estimated budget. This will help support Task 3.
- Subtask 2.2 ..... Executive Report and In-person/Virtual Presentation to USO Leadership: Drilled down/high-level version of the Comprehensive Report no longer than 15 PPT slides that will serve as the Executive Presentation to the USO senior staff. Visuals and graphics are highly encouraged rather than heavy text.

### **Task 3: Execution and Amplification**

The Vendor will execute on the agreed upon tasks from the Executive Report to the USO senior leadership as well as build upon the short- and long-term opportunities, pending budget.

Projects may include but are not limited to:

- Subtask 3.1..... Pending audit, develop budget, timeline and staffing plan to execute long term engagement strategy.

### **Scope of Work Format Detail**

#### **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.
- Maximum length: 2 pages

#### **2. Technical Solution**

- Describe your proposed approach to each requirement included in the Scope of Work.
- Maximum length: 2 pages

#### **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.
- Maximum length: 3 pages

#### **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
- Maximum length: 3 pages

### **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.
- Maximum length: 2 pages

### **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.
- Maximum length: 1 page

### **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).
- Maximum length: 2 pages

## **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.
- Maximum length: 3 pages



## 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							

#### Pricing by Key Personnel

*Note: You may add as many rows as necessary.*

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

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





## TERMS AND CONDITIONS

### Project Summary

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### Purpose

The USO expects to make one award under this RFP. The period of performance is **April 26, 2021 –**

**December 31, 2021.** The anticipated contract award date is approximately **April 19, 2021.**

This will be a **Time and Materials Contract.** All labor will be delivered through a **Time and Materials Contract.** Any related travel expenses required to support the contract if encountered in the course of this contract will be billable on a cost reimbursable basis with no fee. The Vendor will operate at the direction of and receive guidance from the USO.

### Submission Deadline

All quotes and proposals should be sent no later than 5 pm (ET) on **April 12, 2021** through Coupa Sourcing.

### 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
Subtask 1.1 ..... Internal USO Audit: Internal research of programs, services and USO-owned channels, stakeholder interviews, focus groups and surveys.	April 2021 – June 2021
SOW and/or Task Specific Deliverables	Timing
Subtask 1.2 ..... External Audit of Military and USO Correlation/Opportunity: Before the USO embarks on this effort, it is important to fully understand how Hispanics view and perceive the USO’s mission and services, and the reach the organization has been able to achieve. For that reason, we request a comprehensive public opinion research. These findings will help guide our messaging and strategy to better reach the USO’s needs and goals and consolidate its presence within the Hispanic community. This audit should also include insight into how Hispanics view the armed forces and those serving in the military in addition to the USO.	April 2021 – June 2021
Subtask 1.3 ..... Summary Report on Findings and Key Insights	June – July 2021



Subtask 2.1 ..... Comprehensive Strategic Plan with Ranked Recommendations (Short- and Long-Term) Timeline and estimated Budget: The PDF of the document of the Subtask 2.1 should be provided as an addendum.	July 1 – July 29, 2021
Subtask 2.2 ..... Executive Report and In-person/Virtual Presentation to USO Leadership: Drilled down/high-level version of the Comprehensive Report no longer than 15 PPT slides that will serve as the Executive Presentation to the USO senior staff. Visuals and graphics are highly encouraged rather than heavy text.	July 1 – July 29, 2021
Subtask 3.1..... Pending audit, develop budget, timeline and staffing plan to execute long term engagement strategy.	August – December, 2021

**Period of Performance**

The period of performance for the project is **April 26, 2021 – December 31, 2021**.

**Other Requirements**

**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 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; 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 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. 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)).

### **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 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 unreasonable low or high in price.

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

<b>Category</b>	<b>Weight of Rating Factor</b>
<b>Technical Solution</b>	35%
<b>Management Approach</b>	35%
<b>Past Performance</b>	10%
<b>Cost</b>	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.



## Supplier Response

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 format.

### Attachments

- Download **Supporting Documentation** (If applicable)
- Download **Cover Letter** Guide
- Upload completed **Cover Letter**

### Forms

- **Download** Scope of Work Forms in Coupa Sourcing and **Upload** responses.
  - Statement of Understanding
  - Technical Task 1: Audit and Research
  - Technical Task 2: Strategy and Support
  - Technical Task 3: Execution and Amplification
  - Management Task 1: Management Approach
  - Management Task 2: Management Plan
  - Management Task 3: Proposed Project Team Members
  - Management Task 4: Subcontracting Plans
  - Corporate Qualifications
  - Past Performance
  - Cost Proposal

### Cost (Items & Lots)

- **Enter Total Cost of Your Proposal**



## **Post-Submission Information**

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

A Vendor may modify or withdraw its proposal on or before **April 5, 2021, at 5:00 pm**. 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 **April 19, 2021**.

### **Post-Award Conference/Kickoff Meeting**

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

## **Notice to Proceed**



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

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

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

#### **Period of Performance**

The performance period of this contract is from the start date established in the Notice to Proceed and continuing for a one-time project-based effort, **lasting 8 months (December 31, 2021)**. 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:

	<b>Contract 1</b>	<b>Contract 2</b>	<b>Contract 3</b>
<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>			