



## STAFFING LEVEL ANALYSIS 2021

### REQUEST FOR PROPOSAL

Document Reference USO-STAFFANALYSIS2021

March 15, 2021

KEY DATES	
Request for Proposal Posting	March 15, 2021
Request for Proposal Released	March 22, 2021
Deadline for Questions	April 5, 2021
Projected Questions & Answers Response	April 12, 2021
Deadline for Proposals	April 26, 2021
Notification of Downselect and Presentation	May 3, 2021
Deadline for Presentations	May 12, 2021
Projected Award Date	May 17, 2021
Projected Start Date	May 24, 2021



## 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**



## PROJECT SUMMARY

The purpose of this request is to seek and retain a qualified consulting agency to conduct a staffing analysis to determine the optimal organizational structure and staffing requirements to facilitate efficient and effective delivery of program services in the field. There are approximately 240+ centers located worldwide operating with approximately 500-600 employees in the field, and over 30,000 volunteers. The USO headquarters and regional staff will not be included in this assessment.

The selected consulting agency will assist the USO to answer the following questions:

- What is the optimal staffing level at each center/location to provide quality programs and services?
- Does the center/location have sufficient staffing levels and/or skills to provide oversight, supervision, training, and relationship management of volunteers in support of programs and services?
- What are the key drivers behind employee sentiments regarding adequate staffing levels?
- What staffing strategies and actions should be implemented in the near-term, mid-term, and long-term?
- What are the best strategies to respond to scheduled and unscheduled absences, holidays, training, etc.?
- Are there workflow and work process bottlenecks and inefficiencies that could be improved to deliver program services more efficiently and effectively?

The successful bidder will be an agency that best demonstrates how they will apply a proven approach to designing an optimal organizational structure and determining staffing requirements. They will be able to identify why they are the best agency to work with the USO and why they are positioned to provide actionable recommendations.

## PURPOSE

The USO expects to make one award under this RFP. The period of performance is **May 24, 2021 – December 31, 2021**. The anticipated contract award date is approximately **May 17, 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.

**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. Key Organizational Documents and Center/Location Metrics

**1.1** The consulting agency will conduct a review and analysis of key organizational documents including but not limited to position descriptions for employees and volunteers, program overview documents, process and operational documents, and organization structure.

**1.2.** The consulting agency will conduct a review and analysis of all 240+ center metrics containing but not limited to geographic, demographic, organizational, volunteer, budget, and program data. The consulting agency will produce a report regarding their findings and recommendations.

#### Task 2. Employee Perceptions, Needs, and Wants Regarding Staffing Levels

The consulting agency will conduct interviews and/or focus groups to understand the key drivers regarding employee perceptions, needs, and wants regarding staffing levels and produce a report regarding their findings. Questions for consideration may include:

- What is it that employees feel they cannot get completed?
- What are their major obstacles?
- What pressure, if any, are they feeling? Why?
- What could the USO do to help solve their staffing challenges?
- What is their ideal staffing scenario?
- What makes them successful with their current staffing levels?

#### Task 3. Workload Study and Staffing Level Analysis

The consulting agency shall provide the services required to perform an analysis of the workload, staffing pattern, leave pattern, and other factors that influence the staffing level of centers/locations. There are approximately 500-600 employees across 240+ centers/locations worldwide and 30,000 volunteers. When making recommendations, the consulting agency will consider the key roles and functions of employees in delivering programs and services and which roles volunteers can and cannot fill.

**3.1.** The consulting agency will develop and execute a plan to collect time-study data on the work volume. Work volume may include the direct, indirect, and operational tasks employees are completing in support of providing services. The consulting agency will document the tasks employees are performing and the time spent on those tasks.

**3.2.** The consulting agency will collect and analyze information regarding staffing patterns, leave patterns, and other factors that influence the staffing levels.



**3.3** The consulting agency will provide insight into whether a center/location is overstaffed, understaffed, or adequately staffed. The consulting agency will recommend gap closing options (short-term, mid-term, and long-term) and expected impacts based on assessment. Additionally, the consulting agency will provide strategies to respond to scheduled and unscheduled absences, holidays, training, etc.

#### **Task 4. Workflow and Work Process Improvements**

The consulting agency will identify workflow and work process bottlenecks and inefficiencies; recommend work process and workflow improvements; and recommend organizational structure and staffing models that facilitate efficient and effective delivery of program services in the field.

#### **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: 1 page

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

- Describe your proposed approach to each requirement included in the Scope of Work.
- Maximum length: 8 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.

##### **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: 2 pages

##### **3.2 Proposed Project Team Members**

- List proposed project team staff and Identify key personnel. For key personnel, state level of effort.
- Provide bios for all proposed team members. Include proposed job title and a brief description of qualifications, including education and experience. Bios should be no longer than half-page.



- 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: 3 pages

### **3.3 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, 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 corrective actions taken to resolve those problems. Do not provide general information on performance on the contracts because we will obtain that information from the references.

## **Cost Proposal**

### **1. Quote for Services**

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



Sample templates for labor category and rates:

**Pricing by Task**

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

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

**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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### Submission Deadline

All proposals should be submitted on or before **April 26, 2021** at 5 pm (ET) 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
1. Monthly Status Report	Monthly for duration of the project
2. In-Progress Review providing an overview of work completed to date, briefing of initial findings, and planned activities.	Approximately 60 days following the award of the project
3. Center/location metrics report including findings and recommendations (Task 1.2)	Approximately 30 days following the award of the contract
4. Employee key drivers report (Task 2)	Approximately 60 days following the award of the contract
5. Workload time-study report (Task 3.1)	Approximately 105 days following the award of the contract
6. Staffing analysis and gap-closing report (Task 3.3)	Approximately 120 days following the award of the contract
7. Workflow and process improvements findings and recommendations report (Task 4)	Approximately 150 days following the award of the contract
8. Briefing of findings and recommendations	As requested, following delivery of reports

**Period of Performance**

The period of performance for the project is **May 24, 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



Category	Weight of Rating Factor
Technical Solution	50%
Management Approach	15%
Past Performance	15%
Cost	20%

USO will assign the following evaluation scores:

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

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

- **Supplier Response**
  - **Format**
    - All text should be Calibri 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 ‘**Terms & Conditions**’
    - Download ‘**Coupa Step-By-Step Documentation**’
    - Download ‘**Cover Letter**’ Guide
    - Upload completed “**Cover Letter**”
    - Upload “**Presentation**” (if applicable)
  - **Forms**
    - **Download** “Scope of Work” Questionnaires
      - Technical Solution
      - Management Solution
      - Corporate Qualifications
      - Past Performance
      - Cost Proposal
    - **Upload** completed responses to each “Scope of Work” Questionnaire
  - **Items and Lots**
    - Add total cost



### **Vendor Proposal Downselect**

Using the evaluation factors and scoring stated within the Proposal Evaluation Criteria of this RFP, the USO will Downselect the submitted vendor proposals, giving selected vendors the opportunity to provide an oral presentation.

The expected notification date for down-select is May 3, 2021

### **Oral Presentation Guidelines**

Selected vendors shall conduct a Virtual Presentation of their proposed plan to provide, prioritize, and manage the tasks included in the Scope of Work. The presentation shall be delivered either in Adobe PDF format or compatible with Microsoft PowerPoint 2016. Cost should not be discussed during this presentation.

The total duration of the presentation will be a total of 60 minutes, starting when the lead presenter indicates readiness to proceed. Following the 60-minute presentation period, the vendor team will be placed in a virtual waiting room. After a 10-minute caucus period the vendor team will be invited back into the meeting for a 20-minute question and answer session with the evaluation team.

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

### **Post-Submission Information**

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

A Vendor may modify or withdraw its proposal on or before **April 26, 2021, at 5:00 pm (ET)** through Coupa Sourcing.

#### **Late Submissions**

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

#### **The expected notification date for down-select is August 9, 2019. 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 **May 17, 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 7 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. 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:

	Contract 1	Contract 2	Contract 3
<b>Name of contract</b>			
<b>Name of client or customer</b>			
<b>Contract type</b>			
<b>Dates of performance</b>			
<b>Total contract value</b>			
<b>Program manager and telephone number</b>			
<b>Contracting officer and telephone number</b>			
<b>Administrative contracting officer, if different from contracting officer, and telephone number</b>			