



**REQUEST FOR PROPOSAL**

**No. HPI20230201US**

Resource Development Operations: Acknowledgement & Honor Card Fulfillment Programs

RFP Release Date:	February 1, 2023
Performance Period:	July 2023 – June 2026
Proposal Submission Deadline:	March 1, 2023
Question/ Inquiry Submission Deadline:	February 13, 2023
Electronic submission to the attention of:	Carlas Smith, Procurement Officer
Electronic submission:	RFP@HEIFER.ORG
Contact information for inquiries about this RFP:	Carlas Smith, Procurement Officer: Email to RFP@Heifer.org

## I. General Information

This document is being issued in order to solicit applications from potential partners or contractors to conduct the Acknowledgement and Honor Card Fulfillment Programs. These are year-round, ongoing programs with an estimated expense of \$400,000, funded by our general budget, that are currently being implemented in the United States. Potential partners are welcome to bid on one, multiple, or all programs as follows:

- Acknowledgement Letters & Traditional Honor Cards
- Acknowledgement Thank You Certificates
- Recipient Honor Cards
- Multiple Recipient Honor Cards

The terms of reference contain background information, the desired methodology, including objectives, the timeframe for conducting the final evaluation, and a list of deliverables. This document also contains information about the kind of expertise that Heifer seeks for this activity and guidance on how to submit a proposal to conduct the activity.

Heifer anticipates awarding a cost reimbursement contract for the Acknowledgement & Honor Card Fulfillment programs, making monthly payments to the selected Contractor based on submission of fixed fee and volume-based invoices and appropriate documentation to Heifer's Acknowledgement & Fulfillment Manager and HPI's Accounts Payable Department after the close of each month.

## II. Background

Heifer Project International (HPI) is a non-profit organization working to end hunger and poverty while caring for the earth. HPI receives tax-deductible contributions from donors throughout the United States. The Acknowledgement Program prints and mails approximately 300,000 letters to Heifer donors in the US each year. HPI utilizes multiple variations of these letters, which serve as the donor's tax record for contributions made to Heifer. The letters contain variable data captured by Heifer's CRM, including donor information and gift amount, as well as letter text and legal language. The mail package may also include inserts (promotional flyers, business reply envelope, etc.) as directed by Heifer. The estimated expense for implementation of the Acknowledgement Program is \$175,000 per year, not including postage and supplies.

A subprogram within the Acknowledgement Program is the Thank You Certificate Program, which sends approximately 3,000 letter-size certificates to churches, schools, and civic organizations each year. The certificates have variable artwork and data fields as well. The estimated expense of the Thank You Certificate Program is \$20,000 per year.

The Honor Card Fulfillment Program prints and/or fulfills greeting cards ordered by Heifer donors. There are three subprograms under Honor Card Fulfillment. All programs need to be able to handle expedited production/shipping requests (ground, express, 2-day, overnight) as well as standard first-class mail/packages, shipping throughout the United States and US Territories. Significantly fewer orders are shipped outside the US, but the capability is needed on occasion.

The first subprogram is the Traditional Honor Card Program. Pre-packaged cards are purchased by Heifer, and art is supplied by Heifer for on-demand printing of lower quantity orders. These

Traditional cards are mailed to the donor and do not include any printed personalization. If the donor has made a contribution, the card order is merged and mailed with the Acknowledgement letter in one envelope or package. Traditional Honor card orders may also be placed without a donation, thus need to be fulfilled and mailed without an Acknowledgement letter. This program typically mails out 135,000 cards per year. The mail package also includes a pick ticket for the cards, and any inserts (promotional flyer, business reply envelope, etc.) as directed by Heifer. The expense for the Traditional Honor Card program is an estimated \$115,000.

The second subprogram is the Recipient Honor Card Program. These cards are printed on-demand with Heifer's artwork and a personalized message from the donor, and then mailed to a recipient's address that the donor has specified. This program typically mails out 35,000 cards per year, with an estimated expense of \$60,000

The third subprogram is the Multiple Recipient Honor Card Program. These cards are also printed on-demand with Heifer's artwork and a personalized message from the donor, but then the card(s) are mailed back to the donor to distribute. This program typically mails out 3,500 cards per year with estimated expenses of \$20,000 per year

The Acknowledgement and Honor Card Programs have very specific seasonality, with approximately 60% of all volume occurring during a three-month peak season from November through January. The Contractor will need to be able to show capacity for HPI's peak season, and cost-saving solutions for HPI's off-peak season of February through October.

### III. Purpose and Objective

The main purpose of this RFP is to engage a partner to print and fulfill Acknowledgement letters and honor card orders on behalf of HPI.

#### a) Specific Objectives

- a. Print and fulfill letters and honor card orders in accordance with agreed upon timelines with an error rate of less than 2%.
- b. Provide .pdfs of all letters and/or cards generated/mailed on behalf of HPI.
- c. Provide reporting reflecting all services performed, fees received, expenses incurred, or other requested information at times and in a format acceptable to HPI.

#### b) Scope of work

- a. During nonpeak times (February 1 to October 31), HPI intends to send pooled files twice weekly, specific days to be determined. During peak times (November 1 to January 31), HPI intends to send files daily. Contractor will produce mailers and/or cards and mail via USPS or either FedEx or UPS within twenty-four (24) to forty-eight (48) hours from receipt of each file. Receipt of a file is determined as follows: (a) at transmission of the file if sent between 8AM EST and 5PM EST, Monday through Friday; (b) as of 8AM EST the following day if the file is sent after 5PM EST, Monday through Thursday; and (c) as of 8AM EST on the first business day following a weekend or holiday, if the file is sent during the weekend or on a holiday.
- b. Contractor shall provide HPI with files confirming successful processing and mailing of requested letters/cards, any invalid data not able to processed, and other written report or reports reflecting all other services performed, inventory on hand, fees received,

expenses incurred, or other requested information, at times and in a format acceptable to HPI.

- c. When a new letter or card is to be produced, Contractor shall provide electronic letter proofs and/or electronic card proofs to HPI using variable data. All proofs are to be returned to Contractor by HPI with change requests or approval to print.
- d. Contractor shall provide .pdfs of all letters and/or cards generated/mailed on behalf of HPI for reference and use by HPI.
- e. HPI shall pay the U.S. Postmaster through the Contractor in advance according to agreed upon shipping rates for all postage, except for whereby postage funds are drawn directly by The United States Postal Service ("USPS") or other logistic providers directly from USPS Centralized Account Processing System ("CAPS") accounts or through other payment arrangements. As a courtesy, Contractor will arrange for common carrier shipments on behalf of HPI naming HPI as shipper, such shipments to be collected or prepaid by HPI absent agreement to the contrary.
- f. HPI is seeking a partner for a three-year contract with the option to extend.

c) Deliverables:

**Proposed deliverable schedule:**

No.	Deliverable/Task	Responsible	Due date
1	Letters/Cards Produced & Mailed	Contractor	Within 48 hours of file receipt
2	Return Files Confirming Production/Mailings	Contractor	Within 24 hours after production/ mailing
3	.pdfs of letters/cards mailed	Contractor	Within 24 hours after production/ mailing
4	e-Proofs of letters/cards	Contractor	3-5 business days after file receipt
5	Inventory Report	Contractor	Weekly or as requested by HPI
6	Notice to HPI of inventory receipt	Contractor	Within 24 hours of receiving inventory

d) Relationship and Responsibilities

Heifer will assign an Acknowledgement & Fulfillment Manager to coordinate implementation of this activity. The contractor will keep Heifer informed of their progress. During the implementation, the contractor may seek and receive additional advice or guidance from the above-mentioned staff.

IV. Required Expertise

Contractor should have 5 or more years of experience in complex variable data mailings and on-demand digital printing and mailing of four-panel/single-fold greeting cards.

V. Proposal submission requirements:

All interested bidders will submit their proposals with the following information:

1. Technical Proposal

- a.** General Information [not to exceed 5 pages]
  - Organization overview
  - Capacity statement
  - Website
  - Attachments:
    - o legal registration to work within United States of America
    - o Evidence of satisfactory records of performance, integrity, and business ethics.
    - o Evidence of adequate management and financial capacity to manage the award.
- b.** Technical Approach
  - A detailed methodology on how the assignment will be conducted, including a qualitative sampling strategy, data collection methods, procedures, quality control practices and data reporting.
  - List and briefly describe the team and its proposed personnel, indicating what role each proposed individual will have and the qualifying skill set for the position. (Curriculum vitae (CV) of Key personnel.
  - A clear and comprehensive work plan, outlining the major activities, responsible persons and time schedule.
  - Organizational capacity statement, including past experiences and activities related to the project, and experience. Reference information must include the location, award numbers, and brief description of work performed.

2. Financial Proposal

Proposed budget must be in US dollars and submitted separately via e-mail to [RFP@heifer.org](mailto:RFP@heifer.org). The proposed budget should have sufficient detail to allow evaluation of costs proposed. It should at least contain:

- Itemized budget for each program.
- Narrative explanations of line items.
- Heifer reserves the right to request further information supporting detailed costs and prices.

Registered organizations interested in implementing one or more of these programs are requested to submit a proposal typed in Arial size 12 font by March 1, 2023, via email to: [RFP@heifer.org](mailto:RFP@heifer.org). Please include the name of the person in your organization who will be involved with negotiating the contract as well as your telephone and email contact.

Submission must be in English and typed single-spaced. All pages must be numbered, included the RFP reference number and name of the organization at the bottom of each page.

3. Late submissions and verification

Proposals received after the submission deadline will not be considered. Offerors are responsible to ensure their proposals are submitted according to the instructions stated herein.

Heifer retains the right to terminate this RFP or modify the requirements upon notification to the Offerors.

#### VI. Selection Criteria

Submitted proposals must clearly demonstrate alignment with the SOW outlined above with appropriate level of details. An agreement will be signed with the Offeror whose proposal follows the instructions in this RFP. Proposals will be evaluated according to the following criteria:

<b>Proposal evaluation focus</b>	<b>Percentage</b>
Accuracy and relevance of the proposed technical approach and methodology	20%
Completeness of proposal according to the RFP (general information, activity plan, budget, team expertise, etc.)	20%
Proposed team: expertise and competencies to address project components	15%
Relevance and capability/skill to implement/manage the assignment	20%
Diversity and Inclusion	5%
Budget justification and costs realism	20%
<b>Total</b>	<b>100%</b>

The selection committee will evaluate the technical proposal based upon the criteria listed above and the financial proposal will be evaluated the reasonableness of costs and cost-effectiveness in the budget.

#### VII. Validity of Proposals

Proposals submitted shall remain open for acceptance for 60 days from the last date specified for receipt of the proposal. This includes, but is not limited to pricing, terms and conditions, service levels, and all other information. If your organization is selected, all information in this document and the negotiation process are contractually binding.

#### VIII. Award Process and Contract Mechanism

<b>No.</b>	<b>Activity</b>	<b>Due date</b>
1	Proposal reception	March 1, 2023
2	Presentations (Short Listed)	March 13 – March 17, 2023
3	Selection Committee review	March 27-31, 2023
4	Notification of award	April 5, 2023
5	Award agreement negotiation	April 10, 2023
6	Signing award	May 1, 2023

Heifer will issue a cost reimbursement contract based on submission and Heifer acceptance of deliverables.

- IX. **Diversity Clause.** HPI values diversity, equity, and inclusion (“DEI”), and believe that effectively accessing and managing diverse talent leads to improved outcomes. HPI takes a broad view of diversity, inclusive of varied backgrounds including, but not limited to, age, experience, race, ethnicity, sexual orientation, gender, gender identity, disability status, national origin, and culture. HPI expect third-party providers to respect and reflect HPI’s value of DEI. HPI’s ongoing monitoring of third-party service providers incorporates an assessment of vendors’ commitment to, adherence with, and record of accomplishment of accessing and retaining diverse and inclusive workforces.

#### **Policy**

1. Does your organization have a written policy (or policies) addressing workplace DEI (“Policy”)? A Policy defines the firm’s commitment, policies, and practices regarding equal employment opportunity, including the recruitment, development, retention and promotion of a diverse and inclusive workforce and non-discrimination based on gender, race, ethnicity, sexual orientation, gender identity, age, veteran’s status, and other legally protected categories. A Policy (or policies) may be a standalone document or part of a larger firm document. Please provide a copy of your firm’s Policy.
2. If your firm does not have a written policy, do you commit to promptly adopting or providing a copy of a Policy if your firm is awarded a contract with Heifer Impact Capital?

#### X. Limitations

This RFP does not represent a commitment to award a contract, to pay any costs incurred in the preparation of a response to this RFP, or to procure or to contract for services or supplies. Heifer reserves the right to fund any or none of the applications submitted and reserves the right to accept or reject in its entirety and absolute discretion any proposal received as a result of the RFP.

#### XI. Indemnification / Insurance

Section 11.1 Indemnification. Contractor agrees to defend, hold harmless, and indemnify HPI, along with HPI’s agents, directors, officers, representatives, successors, assigns, employees, and volunteers, from any and all claims, demands, damages, actions, causes of action, and liabilities which may result from, arise out of, or relate to any of Contractor’s conduct, misconduct, inaction, or negligence under or in connection with this Agreement.

Section 11.2 Insurance. At all times after the execution of this Agreement, Contractor shall carry and maintain, at no expense to HPI, the following:

- (a) policy or policies of commercial general liability insurance, including but not limited to insurance against assumed and contractual liability under this Agreement, to afford protection with limits, for each occurrence, of not less than \$1,000,000 with respect to bodily or personal injury, death, and property damage, and \$2,000,000 aggregate, along with a \$1,000,000 umbrella or excess liability policy;
- (b) if and to the extent required by law, policy or policies of worker’s compensation or similar insurance in form and amounts required by law;

- (c) if international travel is contemplated under this Agreement, policy or policies of travel, health, medical assistance, and evacuation insurance, with the understanding that the amount of such insurance shall at all times be subject to HPI's prior approval; and
- (d) any and all other policies of insurance as required by HPI.

The identity of the company or companies writing any policy or policies of insurance which Contractor is required to carry and maintain pursuant to this Agreement, as well as the form of such insurance, shall at all times be subject to HPI's approval, and any such company or companies shall be licensed to do business in the state in which this Agreement is being performed. The company or companies writing any insurance which Contractor is required to carry and maintain, as well as the form of such insurance, shall maintain a minimum of an A- (Excellent) financial strength rating, and a financial size category of VIII, with A.M. Best Company's latest rating guide. Insurance policies evidencing such insurance shall name HPI and/or its designee as additional insured and shall also contain a provision by which the insurer agrees that it shall give HPI thirty (30) days' written notice, via certified mail, return receipt requested, prior to any cancellation, non-renewal or change in scope or amount of coverage of such insurance. Each such policy, or a certificate thereof together with a duplicate copy of such policy, shall be promptly deposited with HPI by Contractor. If Contractor shall fail to perform any of its obligations under this Section 10.2, HPI may perform the same and shall be promptly reimbursed for the cost of same. Contractor understands and agrees that, and assumes all risk in connection with, the following: (a) Contractor and its employees, contractors, and agents may be traveling in or to areas that are or may become politically, economically, or otherwise unstable, and these or other unknown conditions may give rise to risks to their safety and security, and medical treatment and medical facilities in some locations may not meet the standards of quality available in their domicile; (b) HPI will not, and is under no obligation to, provide Contractor or its employees, contractors, or agents with travel, health, medical assistance, evacuation, accident, or death insurance or other benefits, or provide medical treatment; and (c) HPI is not responsible for the actions of any hotels, inns, or similar establishments, transportation companies, or suppliers of travel services used by Contractor or its employees, contractors, or agents. Contractor and its employees, contractors, and agents have undertaken any and all research necessary to familiarize themselves with the area(s) to which they will be traveling, and the risks involved with the area(s).

## XII. Intellectual Property

**Section 12.1 Ownership Generally.** Subject to Section 12.2 below, any intellectual property (including but not limited to copyrights, trademarks, servicemarks, and patents), intellectual property rights, deliverables, manuals, works, ideas, discoveries, inventions, products, writings, photographs, videos, drawings, lists, data, strategies, materials, processes, procedures, systems, programs, devices, operations, or information developed in whole or in part by or on behalf of Contractor or its employees or agents in connection with the Services and/or Goods (collectively, the "Work Product") shall be the exclusive property of HPI. Upon request, Contractor shall sign all documents and take any and all actions necessary to confirm or perfect HPI's exclusive ownership of the Work Product.

**Section 12.2 Prior-Owned Intellectual Property.** Any intellectual property owned by a Party prior to the Effective Date ("Prior-Owned IP") shall remain that Party's sole and exclusive property. With regard to any of Contractor's Prior-Owned IP included in the Work Product, Contractor shall retain ownership, and hereby grants HPI a permanent, non-exclusive, royalty-free, worldwide, irrevocable right and license to use, copy, reproduce, publicly display, edit, revise, perform, and distribute said intellectual property, in any format or any medium, as part of the Work Product.



Section 12.3 Work Made for Hire. To the extent copyright laws apply to the Work Product, the Parties agree that (a) HPI specially ordered or commissioned the Work Product, (b) the Work Product is a “work made for hire” under United States copyright laws, and (c) HPI shall be deemed the author thereof and shall own all right, title, and interest therein. To the extent such rights, in whole or in part, do not vest in HPI as a “work made for hire”, Contractor hereby irrevocably grants, assigns, and transfers to HPI, exclusively and in perpetuity, all of Contractor’s rights of any kind or nature, now known or hereafter devised, in, to, and in connection with the Work Product, and HPI shall solely and exclusively own any and all rights therein, and in the elements thereof, including but not limited to any and all allied, ancillary, subsidiary, incidental, and adaptation rights. Contractor hereby waives any and all rights known as “moral rights”, and any similar rights, which Contractor may have in connection with the Work Product. The description of Services and/or Goods provided in this Agreement shall in no way limit the manner in which HPI may use the Work Product.

#### XIII. Termination/Expiration

A Party may terminate this Agreement upon ten (10) days’ prior written notice of termination sent to the other Party. Upon termination or expiration of the Agreement, Contractor shall immediately return all Confidential Information to HPI, along with any unearned Fees and all other HPI property in the possession of Contractor or its employees, contractors, or agents, including any Services, Goods, and/or Work Product for which HPI has paid or agreed to pay, and shall not maintain any copies whatsoever of said Confidential Information or property. Except as otherwise specifically set forth herein, HPI shall have no further obligations to Contractor upon termination or expiration of this Agreement.

#### XIV. Notices

All reports, notices, demands or other communications hereunder must be in writing, and shall be deemed to have been given to the applicable Party (a) upon receipt, if delivered by hand or via a courier service requiring a written delivery receipt, (b) within three (3) business days of mailing, if sent via Certified or Registered Mail, Return Receipt Requested, or (c) upon sender’s receipt of proof of a successful electronic transmission to the applicable Party, if sent via facsimile or electronic mail. Current contact information for the Parties is provided beneath their respective signatures below and may be updated by the applicable Party in writing from time to time.

#### XV. Remedies

The Parties agree that it may be impossible to measure in money the damages that shall accrue by reason of the failure of either Party to perform any of its obligations under this Agreement, and that any irreparable damage

which would result from a breach or threatened breach of this Agreement may be remedied by specific performance, immediate injunction, or any other relief allowed by law.

#### XVI. Applicable Regulations

Offerors must be legally registered to operate within the United States and comply with local applicable legislation, including but not limited to labor law, financial requirements, taxes, etc.

XVII. Attachments

1. Non-Disclosure Agreement
2. Intent to Bid
3. Reference Form
4. Bid/Pricing Form