

**Mail House Services  
Request for Proposal ("RFP")  
For Services Beginning August 1, 2024**

Valley of the Sun United Way ("VSUW") is seeking responses to this RFP to retain a qualified service provider that will provide on-going mail house services for the organization.

**This RFP represents an open and competitive process. Proposals must be submitted and uploaded electronically to <https://vsuw.sendsafely.com/dropzone/rnarramore> no later than 11:59 PM (Arizona time) on May 30, 2024.** Any proposals received after this date and time may not be considered. If you are unable to access the SendSafely file-sharing platform, proposals may be submitted to [RNarramore@vsuw.org](mailto:RNarramore@vsuw.org) as a back-up option.

## **SCOPE OF SERVICES**

VSUW is seeking a service provider(s), beginning in VSUW's fiscal year ending 2025<sup>1</sup>, to support mail house services. Primary services are to fulfill and deploy approximately 8,000 donor acknowledgement letters (standard letter sized 8½" x 11"; 4/0), annual tax letters (standard letter sized 8½" x 11"; 4/0), donor pledge statements (standard letter sized 8 ½" x 11", 4/0; each with bottom panel perforation), and outer #10 envelopes for all letters (4/0), with an inner #9 BRM envelope (1/0) for the donor pledge statements. Additional services may include seasonal direct mail pieces, which may include VSUW's annual year-end appeal, postcards, and more.

Service provider(s) must be able to meet these minimum qualifications:

- Accurate and timely mail fulfillment services, including, but not limited, to variable-data personalization, which may include name, company name, street address, salutation, and variable body copy; printing; folding; sorting and merging; addressing; stuffing; sealing; and postal logistics using VSUW's USPS nonprofit permit imprint indicia and business reply mail accounts.
- Demonstrated information security and data protection of client files in both networked and non-networked computer environments.

Service provider(s) should be able to provide services that include (but may not be limited) to the following:

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<sup>1</sup> The initial contract period is from August 1, 2024, to June 30, 2025; however, VSUW may, at its sole discretion, contract for an additional two (2) years, depending on services needed and satisfaction with services to date. Award of the initial contract does not guarantee additional contract years and/or services. Additionally, the scope of services needed for Mail House Services may vary from year to year.

- On-demand, color printing, *e.g.*, VSUW will not provide preprinted letterhead or envelopes
- Management of sophisticated variable data defined by VSUW business logic rules
- Quality assurance & testing
- Timely processing to meet pre-defined delivery window parameters
- Postal optimization services such as commingling and co-transportation, when appropriate to delivery window parameters
- Advice on other cost-effective mail solutions based on anticipated bi-weekly and/or monthly and/or seasonal volumes
- Secure FTP/MTP site to receive VSUW data files

## EVALUATION

VSUW will evaluate submitted proposals based on the information provided in the proposal, evaluating alignment with the services requested in the above proposed Scope of Services; background, experience, and capabilities of the service provider; pricing and fee structures; and other related criteria. Evaluation methodology is proprietary and confidential to VSUW and will not be shared or disseminated.

Additional considerations should include the service provider's processes and protocols for data processing, personalization based on variable data fields, mail enclosing, and bulk postage rates; recent experience and examples of working with nonprofits, and recommendations/suggestions for mail house strategies/optimizations that can increase efficiencies and reduce costs.

If selected, service provider(s) must agree and adhere to the following security provisions, which will be incorporated into any contract that may be awarded:

- Service provider(s) must have asset protection policies/procedures in place that are applicable to all VSUW assets it may acquire, including:
  - Procedures to protect VSUW assets, including information and software
  - Procedures to determine whether there has been any compromise of assets, *e.g.*, whether loss or modification of data, has occurred
  - Controls to ensure the return or destruction of information and assets at the end of, or at an agreed point in time during the contract
  - Restrictions on copying and disclosing information
- Service provider(s) must have access control agreements covering:
  - Permitted access methods, and the control and use of unique identifiers such as user IDs and passwords
  - An authorization process for user access and privileges

- A requirement to maintain a list of individuals authorized to use the services being made available and what their rights and privileges are with respect to such use
- A firewall must be installed and enabled on each host utilized by service provider(s) for VSUW services (must have a secure network).
- All subcontractors must be approved in writing by VSUW, any subcontractor must adhere to the requirements in the contract, and service provider(s) remains responsible for the acts of any approved subcontractors.
- Service provider(s) must have contingency plans to ensure that services are maintained in the event of a disaster.
- Service provider(s) must have physical protection controls and mechanisms to ensure that controls are followed.
- Service provider(s) is responsible for the security of VSUW information it acquires through the contract.

## SELECTION

A selection decision and notification is anticipated on or before **July 31, 2024**, with services commencing on or about **August 1, 2024**.

Contract terms and conditions will be determined upon selection of a proposal. All contractual terms and conditions will be subject to review and final approval by VSUW and will include scope, budget, and other necessary items.

Submission of a proposal neither guarantees a contract nor guarantees that VSUW will retain any services. Similarly, VSUW is not required to award any contract related to this RFP, and may choose to award part or all of this contract to one or more service providers at its sole discretion.