



SCOPE OF SERVICES REQUIRED

The purpose of this scope of services is to procure a Direct Mail Production Vendor or Agency Partner that can support and execute our MMUSA fundraising programs across acquisition and/or retention audiences. By consolidating production across campaigns and agency partners, we aim to improve operational efficiency, leverage greater economies of scale, and optimize direct mail production and postage costs.

The selected Vendor will provide expertise in direct mail production, USPS regulations and discounts, postal optimization, and production planning to ensure cost-effective, high-quality, and timely delivery. They will work closely with both IRC staff and agency partners. This partnership is expected to improve efficiency, consistency, and cost performance across our direct mail programs while supporting continued donor growth and revenue generation.

Period of Performance

The period of performance for this project will begin upon approval of the Scope of Requirements and initiation of the procurement process and will conclude with the selection of a Direct Mail Production Vendor or Agency Partner and execution of a finalized contract. The bid, evaluation, and contract process must be completed no later than **August 31, 2026**, to align with the expiration and renewal timeline of existing service contracts.

Place of Performance

Most services will be performed at third-party production facilities managed by the Direct Mail Production Vendor or Agency Partner, including print production, mail preparation, data processing, bindery and lettershop services, and coordination with postal services. The selected vendor will serve as the production partner and will oversee and coordinate a network of outsourced production providers to execute direct mail campaigns.

The Direct Mail Production Vendor or Agency Partner must demonstrate the operational capacity to manage production planning, logistics, quality control, and mail distribution through its offices and approved third-party production partners while ensuring compliance with all applicable USPS regulations and industry standards.

Work Requirements

The Direct Mail Production Vendor or Agency Partner will provide production management and operational support for MMUSA's direct mail fundraising campaigns across acquisition and/or retention audiences. They will serve as the primary production partner and will oversee the planning, coordination, and execution of direct mail production through a network of approved third-party production providers.



Key work requirements include, but are not limited to the following:

- Participation in upfront strategy relating to production tactics and capabilities
- Production Planning and Scheduling
- Risk management / contingency planning capabilities (if applicable)
- Production Oversight and Approval
- Third-Party Production Partner Management
- Postal Strategy and Optimization
- Cost Management and Production Efficiency
- Scalability/surge capacity
- Quality Assurance and USPS Compliance
- Data and File Processing Coordination and Quality Control
- Logistics and Mail Distribution Coordination
- Sustainability/environmental practices (if a priority)
- Inventory Management
- Reporting and Continuous Improvement (e.g., mail tracking, delivery timing, error rates)

Schedule/Milestones

The following schedule outlines the anticipated milestones associated with the procurement, evaluation, and implementation of a Direct Mail Production Vendor or Agency Partner.

- **Issue Request for Proposal:** May 18th, 2026
- **Suppliers return signed Intent to Bid forms due date:** May 22nd, 2026
- **Questions from Suppliers due date:** May 27th, 2026
- **Answers to Suppliers questions due date:** May 28th – 29th, 2026
- **Bid submission due date:** June 23rd, 2026
- **Bid Opening and Evaluation date:** June 24th – July 1st, 2026
- **Finalist Vendors Notification for Presentations:** July 2nd, 2026
- **Vendors presentation (In-person IRC HQ office, NY):** July 13th – 15th, 2026
- **Vendors selection:** July 20th – 24th, 2026
- **Contract negotiation with finalists:** July 27th – 14th August, 2026
- **Award of Business:** End of August, 2026
- **Contract start/ Onboarding & implementation:** Early September, 2026

Other Criteria:

- Capabilities for high levels of data personalization, versioning, and testing, to meet the needs of MMUSA Audience-led strategies (up to 12 versions and 15 merge fields, if not more)
- Quick turnaround times and/or clearly outline turnaround time for each type of mailing we have
- Open to working with the IRC on most efficient ways to receive setup data and documents



Acceptance Criteria

Deliverables under this Scope of Services will be considered acceptable when they meet the agreed-upon production specifications, quality standards, timelines, and compliance requirements defined by MMUSA and communicated during project planning.

Examples of Acceptance Completion:

- **Production Planning and Scheduling** – Production schedules are developed in coordination with MMUSA and Agency Partners and approved prior to production.
- **Proofing and Approval Processes** – All print proofs, personalization and segmentation logic, insertion plans, and production samples are reviewed and validated by vendor prior to submission to MMUSA or designated Agency Partner for final approval when required.
- **Quality Control and Accuracy** – Mail packages meet approved specifications, personalization requirements, and quality standards, including data processing, addressing, and mail preparation.
- **Postal Compliance and Optimization** – Mailings comply with applicable USPS regulations and mailing requirements and apply postal optimization strategies.
- **On-time Mail Deployment** – Mailings are entered into the USPS mail stream entry points according to approved in-home targets and timelines.
- **Budget Management** – Manage to IRC approved budgets, apply and recommend cost-savings where applicable, and provide advice on postage optimization.
- **Reporting and Documentation** – The vendor provides required production documentation and reporting, including mail quantities, production outcomes/results, postal optimization results, and issues encountered during execution.

Other Requirements

The Direct Mail Production Vendor or Agency Partner must maintain strict confidentiality and implement appropriate administrative, technical, and physical safeguards to protect MMUSA donor and prospect data from unauthorized access, disclosure, or misuse. Donor data may only be used for approved direct mail production campaigns and must be securely transmitted, stored, and shared only with authorized personnel or approved 3rd party production partners who adhere to the same security standards. The vendor must promptly report any suspected or confirmed data security incidents and securely return or destroy all donor data upon termination of any agreements.