

REQUEST FOR PROPOSAL

SUBMISSION DEADLINE

5:00 PM CST, 4/16/2021

RFP TITLE: OUTREACH STRATEGY TO THE SIGNATORIES OF THE PRINCIPLES FOR RESPONSIBLE BANKING

RFP CONTACT:

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PROPOSAL DEADLINE: April 16, 2021

INTRODUCTION:

Through a global network of international offices and strong support in the U.S., USSEC helps build a preference for U.S. soybeans and soybean products, advocates for the use of soy in livestock and aquaculture feed and human consumption, promotes the benefits of soy use through education, and connects industry leaders through a robust membership program.

PURPOSE OF RFP:

USSEC seeks a contractor to develop and implement an outreach strategy to engage select signatories of the United Nations Environment Program's Principles for Responsible Banking to inform them about the U.S. Soybean Sustainability Assurance Protocol (SSAP). Contractors should have an understanding of sustainable lending in context of the Principles for Responsible Banking, experience engaging financial institutions on sustainability issues, and knowledge of U.S. sustainable agriculture.

BACKGROUND & PURPOSE OF PROJECT:

The United Nations Environment Program Finance Initiative (UNEP FI) launched the Principles for Responsible Banking in 2019 as a framework for financial institutions to demonstrate commitment to the Sustainable Development Goals and the Paris Climate Agreement. Currently, more than 200 financial institutions around the world have signed on to the initiative.

Lending to the food and agriculture sectors is an important business segment for many of these financial institutions. Therefore, as a part of their commitments under the Principles for Responsible Banking, many financial institutions are reviewing food and agriculture lending portfolios through an environmental sustainability lens. This has the potential to impact businesses that are customers of U.S. soy around the world. USSEC recently commissioned a

study to examine the topic of sustainable lending in context of the U.S. Soybean Sustainability Assurance Protocol (SSAP).

USSEC now seeks a contractor to develop and implement a targeted outreach strategy to engage key financial institutions in discussions on how SSAP relates to their commitments as signatories of the Principles for Responsible Banking. The goals of the outreach strategy are to raise awareness of SSAP among financial institutions, and for those institutions with sourcing guidelines that apply to soy, to recognize SSAP as a verification of soy sustainability.

TARGET AUDIENCE:

The direct audience for the strategy is the USSEC Sustainability team. In implementing the strategy, the contractor will communicate with sustainability teams at financial institutions.

SCOPE (SERVICES) OF WORK:

- Review the list of signatories of the UNEP FI Principles for Responsible Banking and identify the subset of financial institutions to target for outreach on SSAP. The contractor will also identify the appropriate individuals within those institutions to contact for further discussion on soy sustainability issues. The target audience is financial institutions lending to businesses that are international customers of U.S. soy.
- Develop an outreach strategy and implementation plan covering the period May 1, 2021 to September 30, 2021. The strategy will include:
 - Prioritization and profile of financial institutions for outreach
 - Topline messaging (may need to be differentiated by geography or other factors as identified by the contractor)
 - Recommended outreach methods
 - Outline of any additional communications materials to be developed
 - Timeline and deliverables for implementation
- Work with USSEC to implement the approved strategy including:
 - Develop any communications materials such as presentations or one-pagers
 - Conduct outreach to financial institutions in accordance with the plan
- Submit a final report on the implementation of the strategy including information on the outcomes of outreach efforts and any recommended next steps.

ADDITIONAL CONSIDERATIONS

USSEC will provide the contractor with the relevant findings from the proprietary study on sustainable lending and the SSAP. USSEC already has extensive communications materials on SSAP and soy sustainability issues. The contractor will use these materials when possible, and will align core messaging of any newly-developed materials with the existing communications strategy.

No travel is anticipated as a part of this contract. The contractor will conduct meetings and other outreach virtually.

DELIVERABLES:

| Completion Date | Description of Deliverables |
|---|---|
| April 30, 2021 | Conduct kick-off meeting with USSEC Sustainability team to finalize scope and solicit initial input. |
| May 10, 2021 | Submit first draft of the outreach list, outreach strategy, and implementation plan. |
| May 20, 2021 | Conduct review session with USSEC Sustainability team to present the draft and discuss feedback. |
| May 30, 2021 | Submit final outreach list, outreach strategy, and implementation plan with USSEC feedback addressed. |
| May 31 – September 30, 2021 | Carry out implementation plan according to the timeline and deliverables agreed to with USSEC |
| Biweekly from May 21 – September 30, 2021 | Check-in with USSEC on progress to date via email or conference call |
| September 30, 2021 | Submit final report on all work conducted during the contract period |

PROJECT TIMELINE:

The contract will last from approximately April 30 to September 30, 2021.

RFP TIMELINE:

- **RFP Distribution:** March 23, 2021
- **Last Day to Submit Questions:** April 9, 2021 by 5:00PM Central Time
- **Project Proposals Due:** April 16, 2021 by 5:00PM Central Time
- **Selections Made By:** April 23, 2021
- **Prospective Contractors Notified By:** April 26, 2021

INSTRUCTIONS:

Proposals must contain at a minimum the specific criteria listed below:

1. Please email the proposal to RFP@USSEC.ORG by **5:00PM Central Time on April 16, 2021**.
2. A description of Prospective Contractor’s capabilities, resources and experience. Emphasis should be placed on experience related to this RFP.
3. A thorough proposal outlining Prospective Contractors planned work, deliverables and timeline to complete the work.

3. Resumes for each of the Prospective Contractor's personnel assigned to work directly on the implementation of the contract.
4. Provide a minimum of two names and contact information for other similarly sized clients for reference purposes.
5. Detailed Budget
 - All bids for services must provide a breakout of how the fee was derived including but not limited to a breakdown of hourly rate and the amount of effort they anticipate to do the work.
6. Proposals should be no longer than **10 pages** (8 ½" x 11").

NOTES:

- Prospective Contractors are hereby notified that proposals will be duplicated for internal review only. Every effort will be made to maintain confidentiality of all information presented. The appropriate representatives from staff and legal counsel will review proposals. Proposals will not be returned.
- USSEC reserves the right to retain all proposals submitted. Submission of a proposal indicates acceptance by the submitter of the conditions contained in the request for proposal, unless clearly and specifically noted in the proposal submitted and confirmed in the contract between USSEC and the contractor selected.
- Confidentiality - Without USSEC's prior written consent, Prospective Contractors and its officers, employees, agents, representatives, affiliates, and subcontractors shall not disclose to any third party any documents, materials or information that the Prospective Contractors learns from or is provided in relation to the RFP request.
- During the evaluation process, USSEC reserves the right to request additional information or clarifications from proposers, or to allow corrections of errors and omissions.
- USSEC reserves the right to reject any proposal that is in any way inconsistent or irregular. USSEC also reserves the right to waive proposal defects or deficiencies, to request additional information, and/or to negotiate with the Prospective Contractor regarding the proposal.
- Prospective Contractor agrees that Fees are in lieu of any and all other benefits, including, but not limited to, repayment of any and all taxes related to contractor service fees, health and life insurance, administrative costs and vacation.
- Prospective Contractor agrees that any income taxes, value added taxes or any other form of direct or indirect taxes on compensation paid under the contract shall be paid by Contractor and not by USSEC or Funding Sources.
 - Prior to any payment to a Contractor, a contractor must provide a W-9, W-8, or W-8BEN upon agreement signature

- Non-Competition. Contractor shall not act as agent or representative for any product or service directly or indirectly competitive with U.S. soybeans or soybean products for the length of the contract.
- USSEC and Prospective Contractor agrees to comply with the provisions of Equal Employment Opportunity (EEO). USSEC provides EEO to all employees and applicants for employment without regard to race, color, religion, gender, sexual orientation, gender identity or expression, national origin, age, disability, genetic information, marital status, amnesty, or status as a covered veteran in accordance with applicable federal, state and local laws.

SUPPLEMENTAL INFORMATION AND BACKGROUND

BUILDING A PREFERENCE FOR U.S. SOY

USSEC's strategy can be found here: <http://ussec.org/about-ussec/vision-mission/>

USB's Long Range Strategic Plan can be found here: <http://unitedsoybean.org/about-usb/strategic-planning/>

We are a dynamic partnership of key stakeholders representing soybean producers, commodity shippers, merchandisers, allied agribusiness and agricultural organizations.

Through a global network of international offices and strong support in the U.S., we help build a preference for U.S. soybeans and soybean products, advocate for the use of soy in feed, aquaculture and human consumption, promote the benefits of soy use through education and connect industry leaders through a robust membership program.

Our 15-member board of directors is comprised of four members from the American Soybean Association (ASA), four members from the United Soybean Board (USB), and seven members representing trade, allied industry, and state organizations.

New board members are seated annually. We are receiving funding from a variety of sources including soy producer checkoff dollars invested by the USB and various state soybean councils; cooperating industry; and the American Soybean Association's investment of cost-share funding provided by the United States Department of Agriculture's (USDA) Foreign Agriculture Service.

The United Soybean Board, created by the 1990 Farm Bill to manage and direct the National Soybean Checkoff, is dedicated to marketing and research for the soybean industry. USB is comprised of 73 volunteer soybean farmers representing the interests of fellow growers nationwide. Each board member is nominated by Qualified State Soybean Boards (QSSBs) and appointed by the U.S. Secretary of Agriculture.

Because of the limitations on administrative and salary costs established in the Act, USB outsources the majority of its program management responsibilities to USB's three primary contractors:

- SmithBucklin-St. Louis for domestic marketing, new uses, production research and Board initiative activities;
- Osborn & Barr Communications for communications/public relations activities and;
- U.S. Soybean Export Council (USSEC), Inc. for international marketing and global opportunities activities.

As one of these three primary contractors USSEC may also undertake initiative activities on behalf of USB. USB considers primary contractor staff (approximately 60 people) as core USB staff. These three primary contractors use a number of subcontractors and, together, these entities carry out approximately 450 projects each year for USB. USB also manages approximately 10 subcontractors.

Non-Discrimination Statement

In accordance with Federal civil rights law and U.S. Department of Agriculture (USDA) civil rights regulations and policies, the USDA, its Agencies, offices, and employees, and institutions participating in or administering USDA programs are prohibited from discriminating based on race, color, national origin, religion, sex, gender identity (including gender expression), sexual orientation, disability, age, marital status, family/parental status, income derived from a public assistance program, political beliefs, or reprisal or retaliation for prior civil rights activity in any program or activity conducted or funded by USDA (not all bases apply to all programs). Remedies and complaint filing deadlines vary by program or incident.

Persons with disabilities who require alternative means of communication for program information (e.g., Braille, large print, audiotape, American Sign Language, etc.) should contact the responsible Agency or USDA's TARGET Center at (202) 720-2600 (voice and TTY) or contact USDA through the Federal Relay Service at (800) 877-8339. Additionally, program information may be made available in languages other than English.

To file a program discrimination complaint, complete the USDA Program Discrimination Complaint Form, AD-3027, found online at [How to File a Program Discrimination Complaint](#) and at any USDA office or write a letter addressed to USDA and provide in the letter all of the information requested in the form. To request a copy of the complaint form, call (866) 632-9992. Submit your completed form or letter to USDA by: (1) mail: U.S. Department of Agriculture, Office of the Assistant Secretary for Civil Rights, 1400 Independence Avenue, SW, Washington, D.C. 20250-9410; (2) fax: (202) 690-7442; or (3) email: program.intake@usda.gov.

USDA is an equal opportunity provider, employer, and lender.

Civil Rights Clause

Contractor agrees that during the performance of this Agreement it will not discriminate against any employee or applicant for employment because of race, color, religion, gender, national origin, age, disability, political beliefs, sexual orientation, marital or family status, parental status or protected genetic information. Contractor further agrees that it will fully comply with any and all applicable Federal, State and local equal employment opportunity statutes, ordinances and regulations, including, without limitation, Title VII of the Civil Rights Act of 1964, the Americans with Disabilities Act of 1990, the Age Discrimination in Employment Act of 1967, and the Equal Pay Act of 1963. Nothing in this section shall require Contractor to comply with or become liable under any law, ordinance, regulation or rule that does not otherwise apply to Contractor.