



USAC Solicitation for Email Marketing Automation Software

SOLICITATION INFORMATION:

Method of Solicitation:	Request for Information (“RFI”)
Solicitation Number:	USAC-25-060
Solicitation Issue Date:	Tuesday, June 4, 2025
Question Due Date:	Monday, June 16, 2025, at 11:00 AM ET
Response Due Date:	Monday, June 30, 2025, at 11:00 AM ET

CONTRACT TO BE ISSUED BY:

Universal Service Administrative Co.
 700 12th Street, NW, Suite 900
 Washington, DC 20005

CONTACT INFORMATION

USAC CONTACT INFORMATION	OFFEROR CONTACT INFORMATION
Mustafa Kamal Procurement Specialist P: (202) 423-2615 Email: Procurement@USAC.org Mustafa.Kamal@usac.org	(complete) Name: _____ POC: _____ POC Title: _____ POC Phone: _____ POC Email: _____ Address: _____



Universal Service Administrative Co. (USAC) Request for Information (RFI) – Email Marketing Automation Software

1. INTRODUCTION

Universal Service Administrative Company (USAC) is issuing this Request for Information (RFI) seeking information from US-based companies with experience in providing email marketing automation software. **Please note that this is not a solicitation for procurement of products and/or services and this inquiry will not result in an award or contract.**

The specifications and information gathered from this RFI will be used to evaluate the offerings of the current marketplace and may lead to the development and preparation of a formal Request for Proposal (RFP).

Information submitted by any interested party will be done so voluntarily and with the understanding that this RFI is for information gathering purposes only and is not a formal solicitation. Similarly, cost ranges will be used solely for budgetary analysis and establishing a target budget. Information presented during this information gathering process will not be considered as a response to any solicitation subsequently issued by USAC.

Respondents may be asked to provide a demonstration of their products and services. This would include a guided tour of their product, business capabilities and technology. Demonstrations may be presented through Internet web conferencing. No compensation will be made by USAC for demonstrations.

2. BACKGROUND

USAC is a not-for-profit corporation designated by the FCC to administer the Universal Service Fund (USF); a multi-billion-dollar fund dedicated to fulfilling the goals of universal service. This important principle suggests that all Americans deserve accessible, affordable, and pervasive telephone and internet services.

USF funds are and disbursed through four USF programs (E-Rate, Lifeline, Rural Health Care, and High Cost). USAC administers these USF programs, which expand telecommunications and broadband access to rural communities, schools and libraries, health care facilities, and low-income households.

USF funding consists of contributions from telecommunications carriers based on an assessment of their interstate and international end-user revenues. These contributions are most typically passed through to consumers through a universal service fee line item on their telephone bills.

Consistent with FCC rules, USAC does not make policy for or interpret unclear provisions of statutes or the FCC's rules. USAC works with in close partnership with the FCC, program



stakeholders, and other federal and state partners to achieve the goals articulated by the FCC for USF programs and contributions to the USF.

USAC has approximately 650 employees. Each of the four USF programs has an independently operating division that includes a team responsible for conducting program-specific stakeholder outreach. In addition, the Shared Services division (one of several enterprise-wide support divisions at USAC) maintains a team that coordinates inter-program outreach, conducts enterprise-wide and internal communications, and maintains USAC's style guide and outreach tools.

Each of these outreach teams regularly sends targeted email marketing content, including program newsletters, bulletins, webinar invitations, outage notices, and more. Combined, USAC's outreach teams consistently maintain between 100k-200k active subscribers. The outreach purpose is largely informational, as USAC has no traditional sales, commerce, or fundraising component. USAC does maintain active customer support services for all four programs. USAC does not currently use social media, nor does it use paid advertisements.

3. INFORMATION SOUGHT

USAC is interested in learning about companies who have proven experience in providing email marketing automation software/tool. USAC is looking for the following information:

1. **Overall Functionality:**
 - 1.1. Provide a high-level overview of your product and how it would allow our organization to conduct email marketing.
 - 1.2. What are the key differentiators of your platform vs. other marketing automation platforms?

4. RFI RESPONSE FORMAT

The response must have numbered pages and also include an index, or table of contents referencing the appropriate page numbers for the below sections.

SECTION 1 – ORGANIZATIONAL OVERVIEW

Maximum: 3 Pages

Please provide a response that includes the following:

- Years of experience in providing email marketing automation software
- Your company's core competencies
- What differentiates your organization and existing solutions in the market
- Number of clients you serve with similar solutions



SECTION 2 - TECHNICAL Q&A

Maximum: 10 Pages

Please provide a response to each of the questions below. Answers must be concise and directly address the question.

1. **Internal User Access Management:**

- 1.1. Does your service limit the number of internal users?
- 1.2. What internal user access management features does your service include?
- 1.3. Can we set up distinct spaces/workflows for different teams?

2. **Content Creation:**

- 2.1. Are we able to modify your platform's out-of-the-box email templates to include our brand styling (i.e., logo and colors)?
- 2.2. Does your platform have any limitations to email template customization?
- 2.3. What testing and previewing features do your platform provide?

3. **Delivery Management:**

- 3.1. Does your service allow for scheduled communication campaigns (i.e., multiple communication touchpoints, paths, and potential external triggers)?

4. **Subscriber Management:**

- 4.1. Does your platform allow us to both manually import subscriber data and integrate with automated intake systems?
- 4.2. How does your platform automate subscriber management in cases such as undeliverable emails and un-subscriptions?
- 4.3. Do admins have access to a master list of subscribers? If so, what reports can they run on this data using in-built platform tools?

5. **Analytics & Reporting:**

- 5.1. What analytics and reporting capabilities does your platform offer? What specific performance and engagement metrics do you track?
- 5.2. How is analytics data presented in your system? What visualizations are available in-system?
- 5.3. Can we export analytics data? In what formats is this possible (email, FTP, etc.)?
- 5.4. How long is analytics data available?

6. **Integration & Compatibility:**

- 6.1. Does your platform have the capability to integrate with any CRM without requiring third-party software?
- 6.2. If so, which CRMs do you support direct integration with?



- 6.3. Are there any platform features that specifically interact with customer service/support data?
- 6.4. How does your platform enable data input from non-CRM or custom-built sources?
7. **AI Integration:**
 - 7.1. How does your platform currently leverage AI? If your platform does not leverage AI today, is it on your roadmap?
 - 7.2. What are your customer data retention and privacy policies as they relate to AI?
 - 7.3. Can customers opt-out of data sharing for Large Language Model (LLM) training purposes?
8. **Support and Training:**
 - 8.1. Describe the capabilities of your customer support services? E.g., would they be able to access our systems remotely if requested?
 - 8.2. What is your support response time?
 - 8.3. Do you recommend that your customers employ an on-staff tool administrator and/or developer, and what technical experience would that role require?
9. **Contract Structure**
 - 9.1. How does the company structure its developmental agreement with USAC? What is the basis for pricing?
 - 9.2. Do you offer a process for purchasing single-send communications to a much larger recipient base than our contract maximum?

SECTION 3 – EXPERIENCE

Maximum: 5 Pages

Proposals shall provide a response that addresses the following question:

- Please provide your experience and expertise in managing email marketing automation software on FedRAMP certified cloud providers. Additionally, describe your experience with supporting and/or migrating to a hybrid cloud solution where part of the infrastructure is hosted on-premises.
- Describe your experience and approach to transitioning in to mission critical hosted solutions. Please provide your insight into any unique challenges/risks and your approach to mitigate such.

In addition, proposals should provide client references that demonstrate similar solutions provided for those organizations.

SECTION 4 – PRICING ESTIMATE

**Maximum: 2 Page**

(Note: Any prices provided as part of this RFI are intended solely for budgetary analysis and to establish a reasonable target budget).

Responses shall include a cost estimate for the following:

- Estimate cost for email marketing automation software.
- Include an estimate for production support and operations maintenance.
- Include an estimate for additional software components, such as software purchases, licenses and ongoing software support.
- Include an estimate for any environmental customization.
- Include an estimate for professional services to lead the implementation effort, develop business processes, and provide training.

5. VENDOR INQUIRIES AND QUESTIONS

Questions and inquiries regarding this RFI, must be submitted by **Monday, June 16, 2025, at 11:00 AM ET**. Please submit all questions to USAC at Procurement@usac.org and include “Questions to RFI – Email Marketing Automation Services” in the subject line.

6. RFI SUBMISSION INSTRUCTIONS

All responses, to this RFI, are due no later than **Monday, June 30, 2025, at 11:00 AM ET**. Responses received after this date and time may not be considered for review.

Responses should be prepared simply and economically and provide a straightforward and concise explanation of the information requested. Emphasis should be on completeness and clarity. The response must have numbered pages and also include an index, or table of contents, referencing the appropriate page numbers for the below sections.

Please submit one (1) electronic copy (PDF) of your response to USAC at Procurement@usac.org. All submissions must include “Response to RFI – Email Marketing Automation Software” in the subject line. Please note: all electronic submissions must be limited to a maximum size of 25 GB.