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ScholarShare Investment Board Request for Proposals No. SIB06-23 Marketing Services

February 26, 2024

The following information is provided in response to questions received by the ScholarShare Investment Board (SIB or Board) regarding Request for Proposals No. SIB06-23 (RFP) for Marketing Services.

Responses to Written Questions

1. Inclusivity in Qualification Evaluation: U.S. marketing education provides a comprehensive foundation for engaging with audiences of all backgrounds, including both English and Spanish-speaking demographics. In this light, how does the Board ensure that the evaluation of proposals does not inadvertently favor proposers with direct experience in specific demographics over those with a broader, yet equally relevant, marketing expertise?

The Board is evaluating responsive proposals pursuant to the process outlined in Section C(5) of the RFP.

2. Non-Discriminatory Participation: Given the critical role of cultural understanding and language proficiency in the program's success, could the Board elaborate on how it fosters a non-discriminatory environment that welcomes proposals from all qualified marketers, including those who, like myself, bring both professional expertise and personal lived experiences to their approach? It is vital to ensure that the process allows for the full participation of professionals who are not only well-prepared in marketing but also embody the diverse identities of the communities the CalKIDS program aims to serve.

SIB welcomes proposals from Proposers that meet the minimum qualifications and other requirements outlined in the RFP. See the RFP and the Sample Standard Agreement included in the RFP for more details on specific requirements.

3. Evaluation Criteria Transparency: To further align my proposal with the Board's expectations, could you provide insight into how the evaluation criteria accommodate and value the integration of professional marketing skills with personal cultural insights and language proficiency?

See the response to Question 1.

4. Will the selected agency be required to hold a business license in California?

The selected Contractor must be qualified to do business in the State of California, and be able to provide evidence of qualification, as outlined in Section B, Minimum Qualifications for Proposers, of the RFP and other requirements outlined in the RFP.

5. Can previous marketing samples be shared with RFP participants?

Examples of existing creative content for CalKIDS can be found at www.calkids.org, as well as CalKIDS social media. In addition, a sampling of past marketing and advertising efforts for CalKIDS is available in material presented at the Board meeting in December 2023 (Agenda Item 11). These materials can be accessed at <https://www.treasurer.ca.gov/scholarshare/meeting/2023/index.asp>.

6. Does the board have a specific engagement metric (i.e., goal number of engagements) in mind for each year of the contract?

This will be determined between SIB and the selected Contractor.

7. Section A. Purpose and Description of Services 1. Scope Overview (page 1): What analytics tools are in place and what access will the proposer have to track and gauge effectiveness?

The analytical tools in place to determine effectiveness include participation on the Program's online portal and traffic to the Program's website and other media channels. Access to these tools will be determined by SIB and the selected Contractor.

8. Section A. Purpose and Description of Services 1. Scope Overview (page 1): Will the awarded contractor have access to enrollment or participation data from CalKIDS?

The selected Contractor will have access to aggregate program data.

9. Section A. Purpose and Description of Services 1. Scope Overview (page 1): How will the Board measure Program awareness?

This will be determined between SIB and the selected Contractor.

10. Section A. Purpose and Description of Services 1. Scope Overview (page 1): You mention the goal of this campaign is to maximize the number of participants accessing the Program. Can you please expand on how SIB will measure success in relation to this goal. What are the specific KPIs?

SIB measures success based on various key performance indicators (KPIs) that may include the number of CalKIDS account registrations, also known as program account claims.

11. Section A. Purpose and Description of Services 3. Scope of Work (page 1): You mention there is already a CalKIDS media campaign. Who is the incumbent?

SIB currently has a contract with Push Media, Inc. (aka Gleeson Digital Strategies) to execute current media campaigns for CalKIDS.

12. Section A. Purpose and Description of Services 3. Scope of Work (page 1): Can you tell us what was successful and unsuccessful in the previous campaign?

In the previous campaign, there was success identified in increasing the number of users, sessions, and pageviews on the program website, which resulted in an increase in the number of total program claims (during the same period the previous year), including notable increases in specific counties in California. The campaign employed a variety of paid media tactics (display, search, video, audio, digital and digital out-of-home, etc.), with display and search producing stronger results. See response to Question 5.

13. Section A. Purpose and Description of Services 3. Scope of Work (page 1): What KPIs were used to measure success in previous outreach campaigns?

Examples of KPIs used to measure success in previous campaigns included number of impressions, clicks, click through rate, cost per impression, and registrations, also known as program account claims, distributions, and linkages to ScholarShare 529 accounts. KPIs for campaigns outlined in the RFP will be determined between SIB and the selected Contractor.

14. Section A. Purpose and Description of Services 3. Scope of Work (page 1): Can you share any of the existing CalKIDS campaign creative?

See response to Question 5.

15. Section A. Purpose and Description of Services 3. Scope of Work (pages 1-2): Will the awarded contractor be expected to work with the contractor awarded RFP No. SIB05-22?

This will be determined between SIB and the selected Contractor.

16. Section B. Minimum Qualifications for Proposers (page 4): Do subcontractors need to meet the \$6-\$10 mil in BOTH Media AND PR management experience requirements or is it one specialty or the other?

See responses to Questions 2 and 4 and Addendum Notice No. 1 to the RFP.

17. Section B. Minimum Qualifications for Proposers (page 4): Is there a geographical limit? Can work be done outside of the state of CA?

See responses to Questions 2 and 4 and Addendum Notice No. 1 to the RFP.

18. Section B. Minimum Qualifications for Proposers (page 4): Are out of state agencies qualified to submit or participate as subcontractors?

See responses to Questions 2 and 4 and Addendum Notice No. 1 to the RFP.

19. Section B. Minimum Qualifications for Proposers (page 4): Would working on a ScholarShare program outside of California (either currently or over the contract term) be grounds for disqualification?

See responses to Questions 2 and 4.

20. Section B. Minimum Qualifications for Proposers (page 4): If a firm has a current contract with ScholarShare 529 and/or CalKIDS Program, does that disqualify them?

See responses to Questions 2 and 4 and Addendum Notice No. 1 to the RFP.

21. Section B. Minimum Qualifications for Proposers (page 4): "Must demonstrate at least five (5) years of experience managing media and public relations campaigns with a project budget between six million dollars (\$6,000,000) to 10 million dollars (\$10,000,000)." Does this requirement pertain solely to the proposer?

Yes, the Proposer on its own (excluding joint ventures) must meet the minimum qualifications outlined in the RFP. See responses to Questions 2 and 4 and Addendum Notice No. 1 to the RFP.

22. Section B. Minimum Qualifications for Proposers (page 4): Are subcontractors required to meet all of the minimum qualifications?

See responses to Questions 2, 4, and 21 and Addendum Notice No. 1 to the RFP.

23. Section C. Proposal Requirements and Information 3. Content and Format of Proposals (page 5): Can appendixes with additional charts and graphics be included with the submission?

Yes, however, SIB requests that proposals incorporate content from appendixes into the responses to the questions directly. In addition, any specific examples or details from appendixes shall be clearly referenced in the Proposer's responses to the questions in the RFP, otherwise, SIB is not responsible for correlating data and/or details with responses to the questions.

24. Section E. Required Attachments, Attachment 3 (page 20): Attachment 3 references 200 hours; is this the number of hours per contract year or for the total contract period?

The estimated 200 total hours for Direct Labor, as allocated amongst all anticipated staff including subcontractor staff, are provided for purposes of computing the cost to determine the lowest Cost Proposal. See Section C(3)(d) of the RFP and Attachment 3 to the RFP. The final number of hours per year and for the duration of the contract will be determined between SIB and the selected Contractor.

25. Are there different agency partners for paid media and creative, and if so who are the current agency partner(s)?

Currently, Gleeson Digital Strategies handles securing paid media, and TIAA-CREF Tuition Financing, Inc. (TFI) handles creative, however, this will be determined between SIB and the selected Contractor. See Section A(3) of the RFP for the Scope of Work for this particular contract.

26. Are we expected to concept any new creative within this budget?

This will be determined between SIB and the selected Contractor. See Section A(3) of the RFP for the Scope of Work for this particular contract.

27. Are there existing brand standards / creative campaign assets we'll be developing / adapting assets from if not concepting new work?

Yes.

28. Are we expected to produce all necessary content within this budget?

Yes. See response to Question 26.

29. How much of the creative work is provided by SIB versus the work we, as the agency, would create?

This will be determined between SIB and the selected Contractor. See responses to Questions 25-28.

30. Are all production costs included within this budget - print, video, events, etc.?

Yes. Please include a cost per anticipated production item (video, print, event, etc.) under Direct Costs in Attachment 3 – Cost Proposal.

31. How much does SIB spend on printing materials each year?

SIB's Plan Manager supported SIB with printing needs reaching nearly \$8,000 spent in 2023. These costs were solely for printing program flyers and materials, not mailing notification letters.

32. How much does SIB spend on events each year?

SIB's Plan Manager supported SIB with one event in 2023, which cost approximately \$6,600 for the event needs and approximately another \$5,000 in additional creative support.

33. What is SIB's point of view on influencer programs and does SIB currently deploy any?

SIB is open to a variety of marketing strategies, some outlined in Section A(3) of the RFP, to meet its goal to increase awareness of and engagement with the Program within California, including influencer programs. SIB does not currently deploy an influencer program for CalKIDS.

34. Is SIB's preference for \$3M go to towards paid media each year based on Attachment 3 Cost Proposal scenario?

This will be determined between SIB and the selected Contractor.

35. How many events does SIB currently average per year?

SIB facilitated one specific CaKIDS event involving paid marketing support in 2023. Throughout the year, however, SIB staff participates in and/or collaborates with organizations on various events throughout California to increase awareness and education about the program.

36. Are we expected to staff and set up/tear down events or is there a third-party vendor handling?

This will be determined between SIB and the selected Contractor.

37. Can SIB provide examples of what it considers to be successful events / PR?

This will be determined between SIB and the selected Contractor. In addition, a successful event / public relations effort may result in increases in earned media, mentions, and partnership opportunities, which would ideally generate an increase in program awareness, engagement, and program account claims.

38. Within the cost proposal worksheet, the agency commission table is automatically calculating off of \$6,000,000. Does this allocation need to stay fixed or can we adjust that number up or down?

This allocation needs to stay fixed for the purpose of computing the cost to determine the lowest Cost Proposal. See Section C(3)(d) of the RFP and Attachment 3 to the RFP.

39. Within the cost proposal worksheet, can we add additional rows to account for all staff that will be assigned to the project?

Yes.

40. Can ScholarShare Investment Board provide examples for the types of events they have participated in or hosted in the past?

SIB organized an event at an elementary school in Sacramento to highlight CaKIDS. The event included speeches from public officials, engagement with students, and an opportunity to register eligible students into the program.

41. In Section 4 "Submissions and Proposals" (section e): Is SIB requesting each copy to be in a separate envelope or can we put the original copy + 3 copies and USB drive all in one sealed envelope together marked as "DO NOT OPEN"?

All copies can be submitted in one or more envelopes.

42. In Cost Proposal Attachment 3, it is stated that we should not modify the cost proposal form. Does this mean that all required labor needs to fit within the 4 fields under “direct labor”? Should we literally be responding to the cost proposal on the worksheet “as is.”

Generally, the Cost Proposal form shall not be modified, however, with regard to required labor needs, see response to Question 39. Also, see responses to Questions 24 and 38, as well as Section C(3)(d) of the RFP and Attachment 3.

43. In Cost Proposal Attachment 3, may we recreate the sheet to add more fields as long as we do not modify the Media Cost Value of \$6,000,000.00?

No. The “Media Buying Services” table should not be modified by Proposers.

44. Scope of Work – Objectives & Success Metrics: What has motivated this RFP solicitation and what are the new needs, especially given the work that is already in the market supporting CalKIDS?

Increased funding to support marketing efforts in raising awareness for the program to drive participation.

45. Scope of Work – Objectives & Success Metrics: Is the objective to increase awareness about the CalKIDS Program or to increase enrollments with associated performance metrics?

Both are objectives for this proposal. See Section A(1) of the RFP.

46. Scope of Work – Objectives & Success Metrics: Are there specific goals for reaching and enrolling a certain number of new families into the CalKIDS program?

This will be determined between SIB and the selected Contractor.

47. Scope of Work – Objectives & Success Metrics: Please clarify if the scope also includes remarketing to existing CalKIDS families to encourage ongoing contributions and increase financial literacy/education?
- a. How does the communication messaging differ for remarketing to existing CalKIDS participants?

This will be determined between SIB and the selected Contractor.

48. Scope of Work – Objectives & Success Metrics: What are the current KPIs used for CalKIDS?
- a. How will success be measured in 2024 and beyond?

See responses to Questions 10 and 13.

49. Scope of Work – Objectives & Success Metrics: In terms of Objectives and Goals, what has worked over the past year (with your current contractor) and what hasn’t proven successful?

See response to Question 12.

50. Scope of Work – Objectives & Success Metrics: What do you see as the strengths of the past/current marketing and media campaigns?
- a. Are there specific tactics or channels that've netted great results?

See response to Question 12.

51. Scope of Work - Media Planning/Buying, Community Outreach (Planning): What media channels are currently active or utilized in 2023?

SIB employed a variety of media channels, including social media, convenience store posters, Crossings Television, search, digital outdoor, display banners, and videos, digital advertisements on blogs, and partnership with school newsletter platforms.

52. Scope of Work – Media Planning/Buying, Community Outreach (Planning): Are there media channels that are “always on”/ evergreen?

In addition to active campaigns that run during several months of the year, SIB also actively promotes CalKIDS content on its social media accounts.

53. Scope of Work - Media Planning/Buying, Community Outreach (Planning): For any out-of-home or direct mail campaigns, should printing and shipping be priced as separate direct costs, or should it be bundled into the cost of media?

Costs for anticipated campaigns should be bundled and included under Direct Costs in Attachment 3. See response to Question 30.

54. Scope of Work - Media Planning/Buying, Community Outreach (Planning): As it relates to Social Media planning:
- a. Which social media platforms does CalKIDS implement paid social campaigns upon?
 - b. Are there any social media platforms that would be off limits for this paid campaign?
 - c. Is social listening provided by the current contractor? If so, what tool is being used? Will social media listening and monitoring be a consideration/need for 2024?

SIB has implemented paid social campaigns on Instagram, YouTube, and Facebook. SIB and the selected Contractor will discuss which social media platforms that may and may not be used. Audio streaming has been utilized on channels such as Spotify, Radio.com, Pandora, Amazon, SoundCloud, iHeart, etc.

55. Scope of Work - Media Planning/Buying, Community Outreach (Planning): Can SIB provide a list of current partner organizations that helps extend CalKIDS community outreach? (i.e., non-profits, banking institutions, school districts, after school programs, etc.)

SIB can provide a list to the selected Contractor. SIB engages a number of organizations and entities ranging from statewide associations, non-profit and community-based organizations, public agencies, county offices of education and school districts in promoting the program to eligible families.

56. Scope of Work - Media Planning/Buying, Community Outreach (Investment & Flighting): Is there a desired cadence of investment of the total \$7.5M contract value over the course of the 2-year period that aligns with seasonality goals and objectives of CalKIDS?
- Are there quarterly or annual expenditure guidelines that we should be aware of?
 - Is there fluidity in the budget between fiscal years?
 - Is there a seasonality we should consider for media activation and flighting?

This will be determined between SIB and the selected Contractor.

57. Scope of Work - Media Planning/Buying, Community Outreach (Target): Are there geographical regions of focus for CalKIDS that should be prioritized for the new campaign?

Geographical regions of focus will be determined between SIB and the selected Contractor. The Program aims to reach regions with high populations of eligible program participants, including but not limited to, low-income families.

58. Scope of Work - Media Planning/Buying, Community Outreach (Target): What are the priority populations and demographics for CalKIDS?

See response to Question 57 and the CalKIDS website at www.calkids.org for more information about populations eligible for the Program.

Targeted populations for the program include:

- **Low-income college-aged students**
- **Low-income public school students in 2nd – 12th grade**
- **Parents of newborns born on or after July 1, 2022 in California regardless of income.**

59. Scope of Work - Media Planning/Buying, Community Outreach (Target): How does SIB define underserved and underrepresented?

Primary target demographics for the Program are low-income public school students and their families, and parents of newborns in California, including those in rural regions, non-English speaking communities, and additional underrepresented communities. Additional details will be determined between SIB and the selected Contractor.

For more information about the Program including eligible populations, see the RFP and the CalKIDS website at www.calkids.org.

60. Scope of Work - Media Planning/Buying, Community Outreach (Target): For targeting purposes, scope of work indicates languages to include English, Spanish, and Other - Can you please define "Other"?

This will be determined between SIB and the selected Contractor. The selected Contractor should consider most common languages spoken in California.

61. Scope of Work – Media Planning/Buying, Community Outreach (Measurability): What analytics tools are currently leveraged by ScholarShare?
- Are there gaps that need to be addressed?

See responses to Questions 12 and 13.

62. Scope of Work - Media Planning/Buying, Community Outreach (Measurability): What site actions are priority (main KPIs) based on campaign goals?

See responses to Questions 12 and 13.

63. Scope of Work - Media Planning/Buying, Community Outreach (Measurability): Will we be able to pixel multiple site action(s)?

This will be determined between SIB and the selected Contractor.

64. Scope of Work - Media Planning/Buying, Community Outreach (Measurability): Will we receive access to Google Analytics and to 1st party data?

This will be determined between SIB and the selected Contractor.

65. Scope of Work - Media Planning/Buying, Community Outreach (Measurability): Does SIB have a Consumer Database that we can anonymize and use for digital look-alike modeling?

SIB can provide aggregate level program data to the selected Contractor. Also, see response to Question 58 for information about eligible populations for the program.

66. Scope of Work - Media Planning/Buying, Community Outreach (Measurability): What is the SIB's current cadence for media reporting and optimization recommendations?

SIB provides reporting to its Board on a quarterly basis, while meeting regularly with the marketing firm(s) to review current activity and results. SIB and the selected Contractor will coordinate as needed to review and discuss expected cadence of reporting and ongoing and future optimization recommendations.

67. Scope of Work - Media Planning/Buying, Community Outreach (PR, Event and Promotional): What type of in-person events has CalKIDS planned and implemented previously?

See responses to Questions 35 and 40.

68. Scope of Work - Media Planning/Buying, Community Outreach (PR, Event and Promotional): Are there specific goals/benchmarks for PR and Community Outreach?

This will be determined between SIB and the selected Contractor.

69. Scope of Work - Media Planning/Buying, Community Outreach (PR, Event and Promotional): Will CalKIDS Subject Matter Experts (SMEs) be available to participate in events, earned media interviews and/or activations?
- a. Also, are there multilingual PR/spokespeople for CalKids that can be leveraged for Earned Media opportunities?

SIB staff can be made available to participate in these types of events and opportunities, including Spanish-speaking SIB staff members.

70. Scope of Work - Content & Production: Can SIB provide more specifics on the creative content development/ production scope of work breakdown and budget parameters as it relates to the grand total listed on the Scope of Work?

SIB seeks a contractor with the capabilities to perform the various items outlined in the Scope of Work, Section A(3) of the RFP. The specific breakdown of work will be determined between SIB and the selected Contractor.

71. Scope of Work - Content & Production: Are there already existing assets that SIB will want us to reuse, or would SIB prefer a whole new suite of asset tools?

SIB has existing assets that may be used. See response to Question 5. However, the addition of new content will be determined between SIB and the selected Contractor. See responses to Questions 25-29.

72. Scope of Work - Content & Production: Is SIB seeking a new look and feel requiring updating brand guidelines, or just new creative ads refreshed and updated?

This will be determined between SIB and the selected Contractor. See response to Question 71.

73. Scope of Work - Content & Production: How frequently does SIB envision refreshing creative assets for the upcoming efforts?

See response to Question 71.

74. Scope of Work - Content & Production: May we see the existing library of assets as well as all campaign materials currently in rotation?

See response to Question 5.

75. Scope of Work - Content & Production: The Content and Production in the Scope of Work item (iii) lists: "Facilitate the production of videos and/or other educational tools using new or existing content for the campaign." Are these live action, animations, or explainer videos?

- a. How many videos should we estimate for cost purposes?

If needed, the number and types of videos will be determined between SIB and the selected Contractor. A sampling of existing videos can be found at <https://www.youtube.com/@CalKIDSPProgram>. For cost evaluation purposes, provide a per video production cost, not to exceed \$15,000 per video, under Direct Costs in Attachment 3 – Cost Proposal.

76. Can a bidder who has a contractual or other business relationship with a program management services contractor that provides services for the Program or ScholarShare 529 bid as a subcontractor to another prime who does not have a contractual agreement with a program or provider?

Yes. See responses to Questions 2 and 4 and Addendum Notice No. 1 to the RFP.

77. If a bidder has a current contractual or other business relationship with a program management services contractor that provides services for the program or ScholarShare 529 at the time of bid, but will not upon award of this contract, may they still bid for this RFP?

No. See responses to Questions 2 and 4 and Addendum Notice No. 1 to the RFP.

78. Is there an incumbent? If so, who?

See response to Question 11.

79. How has the scope of work and/or budget changed since the last RFP, if at all?

SIB received an increased budget allocation to support marketing services for the Program. This RFP includes an expanded scope of services due to the larger budget allocation and program needs.

80. Will bidders be held to the 200 hours for direct labor on the cost sheet for all staff time, or is this simply for evaluation purposes and hours/budget allocations will happen after award in consultation with SIB?

See response to Question 24.

81. The last RFP had a one-year option to renew, can SIB disclose why it chose not to extend this option to the current contractor?

A decision on that item has not yet been determined.

82. In the Scope of Work under section a) subsection ii) bullet three, it reads "specific geographic target markets within the State". Can you provide additional details on the particular markets that are of priority within this scope?

This will be determined between SIB and the selected Contractor. Also, see responses to Questions 57 and 58.

83. Is there an estimated frequency for events planned throughout the State by SIB? If so, could you clarify whether these events are primarily intended as press events, and if not, what would be the nature of these events?

If needed, this will be determined between SIB and the selected Contractor.

84. Regarding the production of videos, is there a projected quantity of videos that the SIB plans to commission annually? Additionally, could you specify whether the preference is for AI-based technology or a traditional production team for shooting and producing the videos?

This will be determined between SIB and the selected Contractor. Also, see response to Question 75.

85. For the printed collateral, should the cost of print be included in the overall production expenses? If so, could you provide an estimate of the quantity of flyers, brochures, etc., expected to be printed annually (e.g., 10,000, 50,000)?

If needed, the quantities will be determined between SIB and the selected Contractor. For cost evaluation purposes, provide a per print job production cost, assuming a quantity of 10,000, under Direct Costs in Attachment 3 – Cost Proposal.

86. Has the SIB engaged in influencer marketing previously, and if so, was it deemed successful? Would you consider incorporating influencer marketing into the upcoming campaign?

See response to Question 33.

87. Can you highlight successful media tactics employed by the SIB in past campaigns that you aim to expand upon in the current campaign?

See response to Question 5.

88. Conversely, are there any media tactics that did not perform well in previous campaigns, which you would like to avoid, or are there strategies you would like to develop to improve their effectiveness?

This will be determined between SIB and the selected Contractor. See response to Question 12.

88. 3) Scope of Work a) Strategy ii, third bullet point (page 2): For the purposes of this Program, how has SIB defined and quantified “underserved and underrepresented” populations and/or regions?

See responses to Questions 57-59.

89. 3) Scope of Work b) Campaigns, Media Buys, and Events iv. (page 2): Will SIB participate in in-person events that the contractor plans and implements throughout the State of California?
- a. If SIB will participate in in-person events, in what way(s) will SIB likely participate, and
 - b. Does SIB have capacity constraints on such participation that proposers should take under consideration?

If needed, this will be determined between SIB and the selected Contractor. Also, see response to Question 69.

90. 3) Scope of Work b) Campaigns, Media Buys, and Events iv. (page 2): For in-person events and to ensure accurate budget costs, does SIB prefer the Contractor to put on unique events from the ground up, or is the expectation that CalAIM be featured at an already existing event throughout the state?

If needed, this will be determined between SIB and the selected Contractor.

91. 4) Term of Agreement (page 4): If the contract were extended for one additional year, what incremental funding would be available for the contract extension year?

The maximum amount of the contract, including the optional one-year extension, will not exceed \$7.5 million.

92. C) Proposal Requirements and Information 3) Content and Format of Proposals a) Required Information v. (page 6): What types of business relationships may be construed by SIB to be a potential or actual conflict of interest?

See responses to Questions 2 and 4 and Addendum Notice No. 1 to the RFP.

93. 3) Content and Format of Proposals c) Experience / Expertise in Marketing Services (ii) (page 7): In the context of SIB's request for proposers to describe their experience on projects or campaigns that focus on asset-building initiatives, what does SIB consider to be relevant "assets?" Is SIB considering relevant assets to be financial assets only, or is SIB defining assets more broadly—such as might include assets like education, peer support or other social networks, job skills, and participation in social services/government funded programs?

Proposers should consider financial-based asset-building initiatives, such as building financial acumen or saving for long-term goals such as education, homeownership, retirement, etc.

94. 3) Content and Format of Proposals d) cost proposal (page 8): In existing contracts with local, state governments and federal agencies, we offer fully loaded hourly staff rates inclusive of fringe, operating expenses and overhead (including Non-Cap Equipment and Supplies, Building Space, Other Overhead and Indirect Costs) as a single hourly rate that corresponds to federal labor categories, education, and experience level. This has been approved and verified based on *Federal Budgeting Best Practices*. This provides a fairer representation of what will be billed to SIB based on actual services provided for this contract. In this case, can we propose these fully loaded hourly rates within Direct Labor, noting rates are fully loaded and leave indirect cost as N/A? Will this budget approach qualify?

Yes.

95. 3) Scope of Work a) Strategy (page 1): Does SIB want to see any formative or discovery research conducted directly with the eligible population (focus groups, etc) prior to moving into campaign development?

This will be determined between SIB and the selected Contractor.

96. Are there any page limit requirements as part of this response?

No.

97. Is it allowable to include links within our PDF to various creative examples we've done to showcase our experience? Please confirm.

Yes, but also provide a hard copy version and electronic version (on USB flash drive) of creative examples. See Section C(4) of the RFP and the response to Question 23.

98. Attachment 3 - Cost Proposal requests an agency commission fee% based on a \$6M media buy. Are we to assume that our cost proposal should include a media buy for \$6M for this scenario and the remainder of the \$1.5M budget is for Marketing Services? Or is there an opportunity to provide a different media buy recommendation and if so, where would we place this amount in the Cost Proposal sheet?

See responses to Questions 24 and 38. The final media budget will be determined between SIB and the selected Contractor.

99. Attachment 3 – Cost Proposal, in the notes, it states “Total shall be calculated assuming 200 hours of services provided by all levels of staff (including subcontractors)” for the “Hours” column of the Direct Labor. Are we to assume that all staff listed must provide a *minimum* of 200 hours to be included on this list? Or that all staff listed must equal no greater than 200 hours total? And is this total for the entire contract term or per year? Please clarify this section.

See response to Question 24.

100. Attachment 3 - Cost Proposal states that totals should be calculated based on number of hours per year. Are we to submit Attachment 3 for the total contract years combined? Or would you prefer we break out costs by year?

See response to Question 24.

101. Attachment 3 – Cost Proposal - Are we to include subcontractor staff titles along with Contractor staff titles in the same table for “Direct Labor?” Or would subcontractor costs be considered “Other Direct Costs” as is standard?

See response to Question 24.

102. Is there an incumbent contractor currently supporting this requirement? If so, what is the company’s name?

See response to Question 11.

103. Is this RFP for the continuation of an existing marketing program?

SIB anticipates the services in this RFP will build upon and complement an existing marketing program.

104. Why are you issuing this RFP at this time? Are there any special circumstances?

See response to Question 44.

105. If a firm or individual is currently working with ScholarShare, does that preclude said firm from participating in this RFP?

See responses to Questions 2 and 4 and Addendum Notice No. 1 to the RFP.

106. How important is having experience providing advertising or media buying services for other CSA or 529 programs in evaluating vendor experience?

See response to Question 1.

107. Will the Agency Commission Rate and corresponding TOTAL amount (\$6M x commission) be incorporated into the calculation the total cost for cost proposal evaluation purposes? If so, how will that be calculated?

Yes. See Sections C(3)(d) and C(5) of the RFP, and Attachment 3 to the RFP.

108. For the "Marketing Services" component of Attachment 3 Cost Proposal, under Direct Costs, should proposed media buy budget be included?

No. The agency commission rate and total for media buying services shall be provided in the specific "Media Buying Services" table and the "Total Contractor Costs" table.

109. For the "Marketing Services" component of Attachment 3 Cost Proposal, for Direct Labor, should the Hourly Rates provided be direct labor hourly rates?

Yes. See response to Question 24.