

**CALIFORNIA ACHIEVING A BETTER LIFE EXPERIENCE (“ABLE”) ACT BOARD
REQUEST FOR PROPOSALS (“RFP”)**

**Marketing Services
RFP No. ABLE 06-18**

**QUESTIONS AND ANSWERS
November 13, 2018**

1) Item 1.2 of the RFP (Page 3) states, “the Program will be implemented in December 2018.” Just to verify, this contract is not anticipated to begin until January 2019, so that implementation refers to operational activity, prior to any marketing. Is that correct?

Yes. CalABLE will already be in operation when this contract executes. Target enrollment goals will apply to the first 12 months of operation following contract execution.

2) What is intended to be included under Direct Costs?

Direct costs are intended to include all costs associated with the planning, development, publication, and rollout of materials included in the proposal. In order to meet the \$250,000 contract limit, it may be necessary to propose fewer printed materials, or select fewer media buys that will still support achieving enrollment targets.

3) Could you provide more detail about the timeline for the project and the time period for measuring the 10,000 enrolled in the CalABLE accounts? If the project starts in January 2019 at the commencement of contract, when would you like the campaign to launch? And would the time period for the 10,000 enrolled start at the campaign launch date or in January 2019?

The CalABLE program will launch to the public in December 2018 and will already be in operation when the marketing services contract is executed. The marketing plan, materials, and services should be developed to cover the first full 12 months of operation of the program.

4) You noted there is a need for qualitative measurement as well as the 10,000 enrolled. Could you provide more detail about this? Would you like interviews done to gather that information and would that be part of the \$250,000 budget and 600 total hours? And would that be done multiple times or at the end?

In addition to enrollment data, contractors should also plan to take into account qualitative measures that go beyond our enrollment targets as a method of reporting overall success. These factors may include earned media coverage, number of individuals reached, unique web impressions, awareness raised, focus group and other

stakeholder feedback, and other methods. These qualitative measures should be built into the marketing plan deliverable required in this proposal. All proposed activities should be included in the \$250,000 maximum budget.

5) Is there an additional budget for the media buys? For example, the RFP noted a broadcast component. Is the media buy for TV part of the \$250K or will there be additional budget for broadcast, outdoor, and radio?

\$250,000 is the maximum budget for this contract and is expected to cover planning, material development, execution, ongoing operations, and media buy costs for this program. There is no additional budget.

6) The RFP referenced preparing reports after “each campaign.” Could you provide more detail about what the expectations are for multiple campaigns? Is each one unique?

“Campaign” in this contract is meant to delineate a series of operations intended to achieve a particular objective. The number of campaigns is at the bidder’s discretion to meet the quantitative and qualitative objectives outlined in the scope of work. A bidder may propose one overall marketing strategy and campaign that includes many sub-campaigns and activities designed to reach all target audiences across various media, or the bidder may elect to propose smaller campaigns targeted to reach a specific audience, or utilize a specific media channel.

7) The RFP said there would be state and national education and outreach efforts as part of the scope of work. Could you provide more information about the national outreach? For example, would the marketing content created for the state campaign be used nationally or would their need to be additional materials created? Is \$250,000 budget to include national media buys, printing and events?

CalABLE is a national program that allows for people living outside the state to enroll. We recognize that our primary audience is California residents. It is expected that proposals submitted would prioritize reaching a California-wide audience and provide additional consideration for reaching a broader/national audience within the \$250,000 budget. This might include recommending outreach at some out-of-state events. Printed materials may be developed to address both audiences in a single publication.

8) Did you want the firm to speak on behalf of the CalABLE accounts as part of the community outreach activities or is it solely to provide the materials to support those activities?

At a minimum proposals should provide planning, materials, media and outreach to support CalABLE staff and its surrogates to achieve enrollment and qualitative goals. We are also open to proposals of additional spokespeople, and firms that will provide outreach directly to potential consumers or media outlets on behalf of CalABLE.

9) How many languages do you need translations for? Do you need materials done in braille?

Our goal is to provide all materials initially in English and Spanish, with select materials in braille as well. Additionally we would like the marketing plan to incorporate adding additional translated languages over time for select materials in California's top spoken languages including Cantonese, Mandarin, Tagalog, Vietnamese and Korean.

10) What is the frequency of non-Board meetings?

Non-Board meetings are intended to cover all meetings whether in-person or via telecommunications required for the planning, execution, evaluation and ongoing operations of the marketing services proposed. The meetings may occur weekly, biweekly, monthly, and/or quarterly

11) Is in-person attendance at Board meetings required or can meetings be attended virtually?

While occasional virtual attendance to Board meetings is acceptable, given the nature of the services provided, there is an expectation that Board meetings with a marketing services focus will require in-person participation.

12) What are some other marketing agencies with whom you have worked either currently or in the past?

This RFP for marketing services is the first for CalABLE. We have not previously had an agency of record.

13) May companies from outside of the United States apply for this?

Bidders must be qualified to do business in the State of California and must provide either evidence of registration with the California Secretary of State, or certification that no impediments to registration exist. A foreign business entity can qualify/register to transact business in California by filing the applicable form with the California Secretary of State. For more information, visit www.sos.ca.gov.

14) Can we perform the tasks (related to RFP) outside of the United States?

The services shall be performed at the offices of the Contractor and at the offices of appropriate affiliates, related entities, subsidiaries and subcontractors; however there will be some mandatory meetings at CalABLE's main office in Sacramento, California.

15) Can we submit the proposals via email?

No. All responses to this RFP must be submitted in hard copy and received by the Board no later than 4:00 p.m. Pacific Time on November 30, 2018. Email or faxed

submissions will not be accepted. The ABLE Act Board does not accept any responsibility for any proposals that are not submitted to the Board by the indicated deadline. All proposals must be mailed or delivered to:

ABLE Act Board
915 Capitol Mall, Room 590
Sacramento, California 95814
Attention: Dante Allen, Executive Director

16) In the minimum qualifications section it states that bidders may not have a contractual or business relationship with three particular entities (AKF Consulting, Pension Consulting Alliance, or TIAA-CREF Tuition Financing). Please clarify if the bidder disqualification is based on a direct business relationship/ contract with one of the three stated companies, or whether working with an affiliate of a subcontractor of one of the three stated companies is also a basis for disqualification.

Disqualification based on contractual or business relationship is based only on the three particular entities listed (AKF Consulting, Pension Consulting Alliance, TIAA-CREF) only. It does not apply to contractual relationships with their subcontractors or affiliates.

17) If two marketing/PR firms are submitting an RFP response together as a prime/subcontractor relationship – is the subcontractor required to complete attachments 2, 5, 7, 8, 9, 10, 15?

In a proposal including subcontractors, the primary firm should complete all attachments, including all subs in their responses.

18) What are the "existing networks" referenced on Page 4, fourth bullet point?

Existing networks includes media channels, social media networks, publications, and in-person gatherings that are already in existence and serve as gathering places for our target audiences. It is not necessary to propose the development of costly new channels or events when current networks already exist.

19) On Page 11, Section 4 – Qualifications and Experience – we are unclear how what is being requested in "g" is substantively different from what is being requested in "h" as they sound somewhat similar to us. Please clarify the difference between "g" and "h" so that we may best respond to both items with clear and separate answers.

These two elements may generate similar responses depending upon the scope of the bidder's experience. In developing this RFP we recognized there may be significant diversity in the types of firms that respond. Some may be traditional marketing firms that have experience with targeting specialty audiences, or they may choose to subcontract with an organization that provides services to people with disabilities. Other responders

may be disability organizations that work with an internal or sub-contracted marketing firm.

Item G does not make the distinction that the experience be specific to marketing activities. Therefore, as an example a community-based organization catering to services for the disability community may provide a response that is not geared toward marketing materials, but focuses on the learnings they have obtained during their time providing services.

Item H is specifically focused on the examples firms can share on how they have demonstrated experience with difficult-to-reach audiences in the development of marketing materials.

20) Are people with mental illness included in the target audience of "people with disabilities?"

Yes, many mental illness diagnoses are included in the ABLE eligibility requirements, so people with mental illness should be considered in our target audience of people with disabilities.

21) Is there an incumbent agency or other contractor currently or recently providing these Marketing Services?

No, this proposal is the first time that marketing services are being sought for CalABLE. Previous outreach and education efforts and materials have been developed in-house or in partnership with CalABLE's contracted program manager.

22) Is this a one-time contract and scope of work to reach the 10,000 goal, or will the program and marketing services continue over subsequent contract periods regardless of whether the goal is or is not reached?

This RFP is intended for one, 12-month cycle, with the option for the Board to extend the agreement for an additional 12-months. There will be no increase in the \$250,000, any extension will be within that not to exceed amount. The 10,000 person enrollment target is our goal for the first 12 months following the public launch of the CalABLE program. While we make no assurances regarding future budgeting or RFPs, we do expect marketing services to be an ongoing need for the program.