



CALIFORNIA ACHIEVING A BETTER LIFE EXPERIENCE ACT BOARD

Achieving a Better Life Experience (“ABLE”) Act Board

Request for Proposals No. ABLE04-23 Marketing Services

ANSWERS TO WRITTEN QUESTIONS SUBMITTED

February 16, 2024

The following information is provided in response to questions received by the ABLE Act Board regarding RFP No. ABLE04-23 for Marketing Services.

1. *Whether companies from Outside USA can apply for this? (like, from India or Canada)*

Answer: Please refer to Minimum Qualifications Section 2.d. which states that firms must be qualified to do business in the State of California and must provide either (i) evidence of registration from the California Secretary of State or (ii) certification that no impediments to registration exist.

2. *Whether we need to come over there for meetings?*

Answer: CalABLE has the capacity to meet with the firm on a virtual platform.

3. *Can we perform the tasks (related to RFP) outside USA? (like, from India or Canada)*

Answer: Please refer to responses to Questions 1 and 2.

4. *Can we submit the proposals via email?*

Answer: Please refer to Submission of Proposal Section 3.4 which states that proposals received by fax or email will be rejected.

5. *Is \$305,000 annually inclusive of all advertising (not just services)?*

Answer: The selected firm is allowed to spend a combined total up to \$305,000 for indirect and direct costs for each year. No additional funds are available.

6. *CalABLE was launched in 2018 and has achieved 10,068 accounts (approx. 1675 accounts per year), and the expectation for the contractor is to reach 30,000 enrollments (10k per year) in the next three years. Is this correct?*

Answer: Yes, the deliverable is to reach 30,000 enrollments by 2027.

7. *It's mentioned that the campaigns would be statewide and national. Even if the budget was \$200k annually, reaching state and nationally identified groups would be a challenge to get enough traction to increase the number of enrollments. Regional campaigns would make more sense to build interest and engagement. Any clarification would be greatly appreciated. We never over-promise and under-deliver; therefore, we want to make sure we clearly understand the expectations.*

Answer: CalABLE is a national program, the marketing plan can address both California's regional markets and national markets.

8. *Exhibit A.c.x. Previously, the budget for Ambassador promotional videos came from the State Treasurer's office, this year being awarded to e-Image. Will ambassador introduction videos still be funded separately by the State Treasurer's Office or is the expectation that this contract will also cover these video recordings?*

Answer: The CalABLE Ambassador promotional videos will be the responsibility of the new marketing firm.

9. *Exhibit A.c.viii When saying "implement a biannual Ambassador campaign", does this mean twice per year or once every two years?*

Answer: CalABLE selects a new class of Ambassadors every two years. The 2024 class of Ambassadors has been selected, the next biannual Ambassador class would be in 2026 and 2028.

10. *Exhibit A.e.i. Has a Seed Funding marketing budget been requested from the State and if so, what is that budget?*

Answer: The seed funding, if passed through Legislation, would be determined by the appropriation approved by the State Legislature, CalABLE is unable to provide a budget amount.

11. *3.3.2.k. Can the firm include marketing materials created for CalABLE in its portfolio?*

Answer: The marketing materials in the portfolio should be representative of the firm's portfolio. If the firm has marketing materials related to CalABLE or other disability organizations, they are encouraged to include them in the proposal.

12. *3.3.2.l. Would CalABLE like for us to propose a budget for Seed Funding or is this blue sky? (see Exhibit A.e.i.)*

Answer: CalABLE is requesting an outline of the marketing strategy if the seed funding becomes available by legislation. The budget would include the hourly rate for personnel and the direct costs associated with the marketing campaign outline.

13. *3.3.4 References: If one of the two state agencies we currently work with is CalABLE, can one of our state agency references be CalABLE?*

Answer: Yes, firms are free to select their state agency references.

14. *3.3.4 References: If the answer to the previous question is no, can we use a reference from a state agency that our key subcontractor works with?*

Answer: The proposing firm is expected to provide five (5) references including a minimum of two (2) references from State Agencies. There is a separate table to provide three (3) references for any subcontractors.

15. *3.3.4 References: If the answer to the previous question is “no,” and we can only provide one state agency because the other is CalABLE, will that disqualify us?*

Answer: Please refer to Attachment 4, Firm References. If the requested references cannot be provided, provide an explanation on an attached sheet of paper.

16. *Attachment 3, Seed Funding: Should we fill out only title and hourly rate for this section, under the assumption that it will inform a separate Seed Funding marketing budget?*

Answer: Yes, the information on Attachment 3 should not be part of the proposed Cost Proposal for each year of the contract.

17. *Do you prefer USB-C or a regular USB flash drive for the digital copy?*

Answer: USB Flash Drive.

18. *3.3.2 Experience/Expertise in Marketing Services, section D. What has been the historical conversion rate from listed paid media channels? Can you provide the current landing pages where these conversions occurred?*

Answers:

- ABLÉ’s Program/Plan Manager Vestwell will provide Google Analytics to see conversion tracking and the ad user journey to the selected firm.
- The current landing pages are still be identified, CalABLE is now able to track the ad user journey after the program conversion in August 2023. This information will be provided to the selected firm.

19. *Is national paid media required?*

Answer: CalABLE is a national program, with the deliverable of 30,000 enrollments by 2027, the firm should submit a marketing plan which meets the deliverable outcome.

20. *How are you currently measuring education and outreach activities?*

Answer: CalABLE staff tracks the number of attendees at each education and outreach activity.

21. *Are we able to get daily csv files of those who started an application and enrolled?*

Answer: Unfortunately, the daily csv files are not available, ABLÉ’s Program/Plan Manager Vestwell will work with the firm on account conversions, campaigns, etc.

22. *Are you able to share 1st party data?*

Answer: CalABLE will need to review and approve any 1st party data requests from the selected firm.

23. *Does the budget include paid media? If not, what's a typical ad spend per year? Do you anticipate funding.*

Answers:

- Refer to the response to Question 5.
- The selected firm will need to determine the ad spend amount within the \$305,000 annual budget.
- CalABLE does not anticipate additional marketing funds.

24. *Coming from other sources that could/would be spent on media? Specifically, will the seed funding have a paid media component?*

Answer: Refer to the response to Question 12

25. *Can you elaborate on what is or may be included in the seed funding budget? Is there any guidance on how the fund has been used in the past? Is there any guidance on the types of goals that were associated with the fund in the past or looking to the future?*

Answers:

- Refer to the response to Question 12.
- This is a new funding source California is hoping to provide with legislative approval other states have used a similar tool.
- The amount of funding will determine the goal of the campaign.

26. *Does the stated budget per year include the costs to produce the advertising? For example, if a new anthem video is needed, will the budget to produce that video come from the stated budget? If not, where will it come from?*

Answer: Each firm is responsible for submitting a marketing plan, if a new anthem video is part of the strategy this should be included in the proposed budget.

27. *Is there an agency or firm currently doing this work? What lessons have you learned from working with the existing firm?*

Answers:

- CalABLE currently contracts with Program 11, LLC.
- Program 11 has identified our audience and the successful paid media platforms.

28. *What are the main responsibilities of the Board and Deputy Executive Director, the 529A Program/Plan Manager, the communications office of the California State Treasurer's Office, and the Board's other Contractors? Is there an existing process for strategizing and executing marketing plans? Would you be able to provide an*

overview of the process? Can you share some of the existing pros and cons, if applicable?

Answers:

- The firm works directly with the CalABLE leadership team providing reviews and approvals, Vestwell the 529A Program/Plan Manager provides data analysis of accountholders and compliance reviews, the STO Communications Department reviews all videos featuring the Treasurer and promotes CalABLE on the STO social media channels, the board currently does not actively participate in the marketing strategy, although it approves the selected bidder.
- There is a working relationship between the CalABLE team and Vestwell.
- Currently the marketing team meets weekly with the CalABLE team and bi-weekly with Vestwell and CalABLE to review analytics, strategy, and deliverables.
- There are no existing pros and cons to share.

29. Is there a clear total addressable market (TAM) for this audience? Is there consumer demographic information available for the audience? Will it be possible to obtain that information?

Answer: Yes, there is TAM for this audience. CalABLE has demographic information on the current account holders. The selected firm will be provided with the information.

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

Answers:

- The current marketing contract expires on June 30, 2024.
- California state law requires agencies issue Request for Proposals every three years for open competition.

31. Is this a new effort or the continuation of existing marketing campaign?

Answer: CalABLE has an organic social media presence, the new firm will propose a marketing campaign designed to enroll 30,000 accounts by 2027.

32. If the subcontractor for this proposal meets Minimum Qualifications a) Firm must have a minimum of three (3) years of experience designing, producing, and implementing marketing communication services and outreach to the disability consumer demographics, but the prime contractor does not can the subcontractor's experience meet this minimum qualification for both organizations or will the prime contractor's response be disqualified?

Answer: Please refer to Minimum Qualifications Section 2.d. which states that each Firm must certify that it meets all minimum qualifications, including a minimum of three years of experience designing, producing, and implementing marketing communication services and outreach to the disability consumer demographics. A subcontractor's experience cannot meet the qualification for both organizations.