



OFFICE OF THE ILLINOIS STATE TREASURER
MICHAEL W. FRERICHS

REQUEST FOR INFORMATION
E-Mail Marketing Solution

September 15, 2020

Responses due before 2:00 p.m. CT on November 6, 2020.

Ms. Maria Oldani
Chief Procurement Officer
400 West Monroe Street, Suite 401
Springfield, IL 62704

**Office of the Illinois State Treasurer
Request for Information
E-Mail Marketing Solution**

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I. INTRODUCTION

The Office of the Illinois State Treasurer (“Treasurer” or “Treasurer’s Office”) is issuing this request for information (“RFI”) regarding industry best-practices for the structure, management, and implementation of a new e-mail marketing platform. Responses will assist the Treasurer in designing, branding, and implementing the e-mail platform.

Service providers (“Respondents”) shall submit their responses to this RFI before 2:00 p.m. CT on November 6, 2020. The Treasurer seeks responses from individuals and entities with expertise in assisting organizations and companies with large lists of segmented emails in communicating effectively to a variety of populations by way of an industry-leading e-mail solution.

The Treasurer intends to utilize the information collected through this RFI to develop the procurement process for a new officewide e-mail marketing platform.

II. BACKGROUND

Dating back to 2015, the Treasurer has leveraged an e-mail marketing platform to communicate to a wide variety of constituencies, from large statewide audiences to small, targeted audiences. Through its use of a variety of e-mail campaigns, the Treasurer communicates with over 650,000 individuals on a monthly basis. Currently, the Treasurer’s marketing platform has reached its maximum use and the Treasurer is experiencing limitations with its current e-mail marketing platform and seeks an improved, industry leading replacement.. Thus, the Treasurer is seeking information on industry leading e-mail marketing tools that are cost effective for a public office to leverage to take its digital communications to the next level.

A. Objective

Key features that the Treasurer will focus on when searching for a replacement e-mail marketing platform include:

1. A suite of tools available to easily build modern, engaging email templates and campaigns that seamlessly conform to the Treasurer’s brand guidelines;
2. Strong email testing, including but limited to, viewing in mobile/desktop, identifying dead links, spell and grammar check, and subject heading effectiveness;
3. Image library to resource stock photos from. Ability to organize, store, and resize images imported and embedded in template;
4. Strong support that can respond to Treasurer’s requests within 24 hours and provide continuous training on new platform features and underutilized tools;
5. Subaccount structure to manage the numerous program area email addresses;
6. Industry-leading unsubscribe tool;
7. Industry-leading subscription tool that allows for sharing and promotion on a variety of platforms;

8. Dashboard panel and metrics to quickly assess the success of an email communication and identify strengths and weaknesses;
9. Ability to host past e-mail messages on the Treasurer’s website as well as cross-promote them on other platforms, including but not limited to the Treasurer’s social media outlets;
10. Ability to import and export specific e-mail addresses that coincide with specific Treasurer programs, with the possibility of communicating to centralized data warehouse;
11. Ability to include in contact listserv identifying fields such as contact’s first and last names, city, state, zip code, program area(s) of interest, and other demographic data;
12. Ability to track the lifespan of a contact from when it was acquired, including how it was acquired, to what subaccount/program the contact is included in, and what emails the contact has received and opened.

III. RFI PROCESS AND SCHEDULE

This Section outlines the process and schedule associated with this RFI.

A. Schedule

The following is the schedule for this RFI:

Date	Event
September 15, 2020	RFI published on the Treasurer’s website
October 2, 2020	All Respondent questions due by 5:00 p.m. CT.
October 16, 2020	Responses to all questions posted on the Treasurer’s website by 5:00 p.m. CT.
November 6, 2020	Responses to the RFI due before 2:00 p.m. CT.

These dates are subject to change at the Chief Procurement Officer’s (“CPO”) discretion.

B. Contact information

The CPO is the sole point of contact concerning this RFI.

Respondents should submit questions about the intent or content of this RFI and request clarification of any and all procedures used for this RFI prior to the submission of a response. Respondents must submit their questions in writing by e-mail to the CPO, Maria Oldani, at moldani@illinoistreasurer.gov by 2:00 p.m. CT on October 2, 2020.

C. Response Submittal

Any Responses submitted to the Treasurer by mail or messenger on or before October 30, 2020 shall be sent to the address below.

Ms. Maria Oldani
Chief Procurement Officer
Office of the Illinois State Treasurer
400 W. Monroe, Suite 401
Springfield, IL 62704

All Responses to the RFI submitted by e-mail, or by mail or messenger on or after October 31, 2020, shall be submitted before 2:00 p.m. CT on November 6, 2020 at the address below:

E-mail: MOldani@illinoistreasurer.gov

Address: Ms. Maria Oldani
Chief Procurement Officer
Office of the Illinois State Treasurer
400 West Monroe Street, Suite 401
Springfield, IL 62704

Responses will be opened publicly, via livestream only, at 2:00 p.m. CT on November 6, 2020. The livestream will be available online at <https://www.facebook.com/ILTreasurerProcurement>.

D. RFI Process

1. Questions about this RFI
Respondents must submit questions about the intent or content of this RFI and request clarification of any and all procedures used for this RFI prior to the submission of a Response. Respondents must prepare their questions in writing and send them by e-mail to the above contact person.
2. Internet/E-mail Communications
The Treasurer's Office may also communicate with Respondents via e-mail. Each Respondent should provide an e-mail address with its response for ease of communication throughout this RFI process.
3. Verbal Communications
Any verbal communication from the Treasurer's Office or its contractors concerning this RFI is not binding on the Treasurer's Office and shall in no way alter the terms of this RFI.
4. Amendment
If it is necessary to amend this RFI, the Treasurer's Office will post amendments on the Treasurer's Office website:

http://www.illinoistreasurer.gov/Office_of_the_Treasurer/Procurement/Procurement_Opportunities

5. Respondent's Costs

The cost of developing a Response is each Respondent's responsibility and may not be charged to the Treasurer's Office.

6. Withdrawal of Response

A Respondent may withdraw its Response at any time prior to the deadline for receipt of Responses. The Respondent must submit a written withdrawal request, addressed to the CPO and signed by the Respondent's duly authorized representative.

7. Modification of Response

A Respondent may submit an amended Response before the deadline for receipt of Response. Such amended Response must be a complete replacement for the previously submitted Response and must be clearly identified as such in the transmittal letter to the CPO.

8. Response to RFI is State Property

On the response due date, all responses and related material submitted in response to this RFI become the property of the State of Illinois.

All responses received by the Treasurer will be open to the public, though a Respondent may request that the Treasurer treat certain information as confidential in accordance with 44 Ill. Admin. Code §1400.2505. If Respondent requests confidential treatment of any information it considers to be exempt from public disclosure under the Illinois Freedom of Information Act ("FOIA") (5 ILCS 140) or other applicable laws and rules, Respondent should submit a redacted copy, which copy shall be clearly identified as "Redacted Copy." In a separate attachment to the Redacted Copy, Respondent shall supply a listing of the provisions of the response, identified by section number, for which it seeks confidential treatment, identify the basis of each claimed exemption, and show how that basis applies to the request for exemption in accordance with 44 Ill. Admin. Code §1400.2505(1).

A request for confidential treatment will not supersede the Treasurer's legal obligations under FOIA. In responding to a request made under FOIA, the Treasurer reserves the right to rely on Respondent's decision whether to submit a Redacted Copy with its response, and the Treasurer is under no obligation to notify the vendor prior to providing a complete and unredacted proposal, with any unredacted attachments, if Respondent does not elect to provide a Redacted Copy with its response as described in this Section.

9. CPO May Cancel the RFI

If the CPO determines it is in the Treasurer's Office best interest, she reserves the right cancel or modify the RFI.

IV. QUESTIONS

The Respondent must answer the following questions:

Program Structure, Administration, and Oversight

1. What are your recommendations as to the latest features that are important to consider when acquiring a new e-mail platform?
2. Given that the Treasurer already has a preexisting e-mail marketing platform, how would the Treasurer effectively migrate from its legacy platform to a new platform? Please share any tools, components or general ideas that would assist in the transition.
3. The Treasurer has had various instances in which access to its legacy e-mail marketing account has been suspended or restricted due to issues with e-mail list cleanliness. Are there e-mail list policy and practices to ensure that our e-mails are delivered seamlessly to the intended recipient, and that The Treasurer's account(s) do not get blocked or flagged by third-party service providers?
 - a. Additionally, please make any recommendations on industry leading e-mail list management, in particular, as it pertains to our goal to continuously eliminate suppressions (e.g., spam, invalids, blocked, and bounced e-mail addresses).
4. Please share your recommendations for the following e-mail marketing platform elements:
 - a. Innovative templates and tools to build aesthetically pleasing, branded communications;
 - b. Message testing, subject heading effectiveness, and A/B testing in general;
 - c. Identifying vulnerabilities (e.g., dead links, misspellings, grammar issues);
 - d. Image library resources;
 - e. Organization of image library;
 - f. On-demand support and troubleshooting;
 - g. Subaccount structure, or, structure by which multiple authors may have access to the platform (with access limitations);
 - h. Incorporation of rich media, e.g., videos, into campaign
 - i. Storage and archival of past sent campaigns for future viewing
 - j. Ability to cross-promote campaigns via social media, web, and other platforms;
 - k. Industry leading unsubscribe tools compliant with CANSPAM Act;

- l. Industry leading subscription tool;
 - m. Import/Export ability for specific email lists that coincide with specific programs;
 - n. Ability to communicate with a centralized data warehouse; and
 - o. Contact tracking (when/where acquired, subaccount/program association, campaigns contact has received/opened/clicked links).
5. Please share any additional suggestions that the Treasurer may not have listed or Respondent is aware of that would be ideal to consider when acquiring a new e-mail marketing platform.
 6. The Treasurer's Office total listserv currently numbers above 650,000, with the expectation that growth will take exceed 1,000,000 e-mail addresses in the coming year(s). For any suggested e-mail marketing platform sufficient for this many e-mail addresses, please discuss any similar engagements with government entities. As this is an RFI, Respondents must only submit non-price information.