

Office of the Illinois State Treasurer
Michael W. Frerichs

Request for Proposals Marketing Services
370-800-17-004

Addendum 3
June 20, 2017

Below are the questions received by the Office of the Illinois State Treasurer (“Treasurer”) and the Treasurer’s responses. Any capitalized terms that are not defined herein have the meaning set forth in the Request for Proposals Marketing Services (370-800-17-004) (“RFP”) published by the Treasurer on May 26, 2017.

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

A company based outside of the United States may submit a proposal in response to the RFP, so long as it can otherwise meet the terms and requirements of the RFP. All respondents must be authorized to do business in Illinois.

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

At this time, the Treasurer anticipates periodic meetings that require in-person attendance at the Treasurer’s office locations in Chicago and Springfield, Illinois.

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

Please see the response to Question #2 above, though certainly some tasks may be performed remotely.

4. Can we submit the proposals via email?

No.

5. Can you please let me know who the incumbent is for this solicitation?

The Treasurer does not have a vendor currently providing the office-wide services contemplated in this RFP.

6. What is the role of the contractor under this RFP in coordinating with program managers that sub-contract with other marketing firms for ABLE, Secure Choice, College Savings and ePay?

This RFP seeks a vendor to create and maintain a coordinated approach for all marketing efforts within the Treasurer's Office. Working with the Office of Communications, the Contractor would also assist to ensure a consistent message with the same look and feel across all programs and divisions of the Treasurer. This contractor will work with program managers as necessary to ensure the marketing efforts of those divisions remain consistent with the overall marketing approach undertaken by the Treasurer and the Contractor.

For example, the Contractor will work with the Office of Communications to ensure coordination in the event any of the Contractor's marketing projects overlap with those conducted by the existing vendors. This may include periodic check-in, at the Treasurer's direction, among the Contractor and divisions' existing vendors.

The Treasurer will continue to utilize certain financial services vendors for College Savings, e-Pay, Secure Choice and ABLE that provide marketing services, either by the vendors themselves or through subcontractors. The Contractor would work with the Treasurer, those vendors and Civis Analytics, which has been retained by the Treasurer to help target messaging for College Savings. For Unclaimed Property, Ag Invest and Finally Home (a program to help homeowners avoid foreclosure), we anticipate the Contractor would be the sole provider of marketing services.

7. On page 8, under Scope of work:
 - a. A, can you please elaborate on how the contractor is expected to evaluate the current marketing initiatives for I-Cash, Ag Invest, IL Funds and Charitable Trust when these programs currently do not have advertising
 - b. C #3, please provide your definition of a community (i.e. city, county, township, etc...) Also, how many total communities are there in IL?

The above-referenced programs do, to an extent, have advertising, which includes website promotion and events. The Treasurer will work with the Contractor to ensure it receives sufficient information to understand and evaluate current marketing initiatives.

"Communities," in this context, is used broadly to define both physical geographic communities as well as demographic groups (e.g., ethnic, age-specific, socioeconomic). Generally, this office wishes to reach all "communities," however defined, over the course of this project.

8. On page 9, IV.A.4, you requested a conceptual approach, please elaborate on your expectations.

At a minimum, the conceptual approach should set forth a general, high-level statement of the method, technique, and/or manner that the Respondent proposes to provide the Services. As stated in the response to Question #12

below, there may be some overlap with the Plan submitted as part of your response.

9. On page 10, IV.A.5, the RFP states to respond to all the questions in Section IV.B of the RFP with all the headings. On page 11, Marketing Plan #1, it says to refer to Section IV.A.4 (Scope of Work, page 9) and provide the recommended approach. Is the Conceptual Approach from the Scope of Work the same as the Recommended Approach under the Marketing Plan (on page 11)? If these two statements are the same, are you looking for a reiteration the Scope Work to answer Marketing Plan #1?

Yes, the response to Marketing Plan #1 is meant to be the brief narrative contemplated in IV.A.4; they are one in the same and you need not answer it twice. That is, please respond to IV.A.4 and then feel free to not repeat the answer for Question #1. We will evaluate your answer to IV.A.4 as part of the “Marketing Plan” evaluation included in the scoring grid in VI.B of the RFP.

10. On page 11, #2, it states to provide a plan from July 1, 2017-June 30, 2018. With the Notification of the Award being on July 31, 2017, should we assume a later start date for the plan after negotiation has taken place? Are you expecting to receive in the RFP a full marketing plan for the year including media placements, costs and dates? Or are you looking for generalized marketing plan recommendation?

The Treasurer seeks as much specificity as possible (e.g., indeed including suggested placements, costs and dates where possible) in the marketing plan; the answer to Marketing Plan #1 is intended to be the more generalized marketing approach. And while the Treasurer certainly hopes for a brief negotiation in order to commence the Services as soon as possible, it is anticipated that the work may not begin immediately following Notification of Award.

11. On page 11, #2, it states that the Treasurer anticipates an overall dedicated marketing budget of approximately \$500,000 (annually) and \$1.3M (over 2 years) within unclaimed property and college savings divisions. But it doesn't address the estimated budget for all programs. If a full marketing plan is needed, can you share the overall budget with us for the 4 programs in question?

Available funds across all programs for future fiscal years cannot be provided at this time, which is why information provided in the RFP was meant to be an example rather than an exhaustive list. The goal in providing certain budget estimates was simply to give a general idea of what might be appropriate within a division of this office. While the Treasurer cannot promise specific amounts, for the purposes of your submitted marketing plan, feel free to utilize similar annual budgets across other divisions as well.

12. Please explain how the Approach and the Plan are different?

The conceptual approach should set forth a general, high-level statement of the method, technique, and/or manner that the Respondent proposes to provide the Services. By comparison, the Plan should provide details relating to specific programs and initiatives of the Treasurer. The Plan's details must specific goals and measurable outcomes.

There may be some overlap between the two.

13. On Page 12, #16 and #17, please cite with supporting data, what is the expectation for the supporting data?

There is no specific expectation beyond the numbers and percentages, but the Treasurer would like to see any relevant policies or other information or explanation that would be beneficial to provide regarding efforts toward diversity.

14. In Appendix A, please elaborate on what is included in the unclaimed property newspaper notices flat fee.

The referenced fee would include the price for the vendor's services in ensuring the newspaper notices are published; please refer to page 7, Item #6 – *Publication of Unclaimed Property Owners' Names (I-Cash)*. The contractor, receiving a list of names from the Treasurer of persons potentially having unclaimed property, will request bids from newspapers across Illinois, typically (and subject to Treasurer approval) optimizing large circulation and low cost, to publish local names prior to May 1st and November 1st each year as required by Section 12 of the Uniform Disposition of Unclaimed Property Act (765 ILCS 1025). This price proposal need not include the actual cost of purchasing the newspaper advertisement, though the Treasurer may provide an allowance in the contract for those out-of-pocket costs.

Please note that 100 and 89 newspapers statewide published this information for the Treasurer in October 2016 and April 2017, respectively.

15. When will the addendum for Appendix B become available?

This addendum is now available on the Procurement Opportunities page of the Treasurer's website.

16. Are you looking for an overarching marketing plan that ties the 8 financial programs together in addition to individual plans for those programs that currently do not have a program manager or are working with other marketing firms (e.g. I-Cash, Ag Invest, The IL Funds, Charitable Trust)?

Yes.

17. Can you prioritize the 8 financial programs (especially those that do need marketing support because they're not being covered by a program manager/marketing firm), whether by interest, need, budget, etc.?

Obviously, there is no unimportant program. However, to address your question, we have prioritized the programs based on the anticipated marketing needs. This priority list is subject to change.

1. College Savings (Bright Start, Bright Directions)
2. Unclaimed Property (I-Cash)
3. ABLE
4. Illinois Funds
5. e-Pay
6. Ag Invest
7. Charitable Trust
8. Secure Choice

18. Do you have an idea of marketing budget, both for overall efforts as well as individual programs?

Please refer to the response to Question #11 above.