

Office of the Illinois State Treasurer
Michael W. Frerichs

Request for Proposals
Marketing Services
370-800-24-025

Addendum 2
June 7, 2024

Below are the questions received by the Office of the Illinois State Treasurer (“Treasurer”) and the Treasurer’s responses. But for the removal of identifying information, the questions listed herein are intended to be accurate representations of the questions received; as such, any errors in usage or spelling have not been corrected. Any capitalized terms that are not defined herein have the meaning set forth in the Request for Proposals Marketing Services 370-800-24-025 (“RFP”) published by the Treasurer on May 23, 2024.

1. Are there specific demographics that are under-utilizing the I-Cash program that you’d like to do more concerted outreach to?

The greatest challenge for all demographics is credibility. Constituents may be skeptical of the legitimacy of outreach by the office, particularly when attempting to reunite property owners with what is rightfully theirs.

The Treasurer’s Office does not currently have data that supports a specific demographic being harder to reach than others. Research in this area by other states has found that constituents of economically marginalized communities are harder to contact, and that some recipients are even hesitant to cash checks.

2. You’ve talked about 5 websites that you’d like user journeys for. Can you confirm the exact URLs?
 - a. [Michael W. Frerichs - Illinois State Treasurer \(illinoistreasurer.gov\)](https://illinoistreasurer.gov)
 - b. [Michael W. Frerichs - Illinois State Treasurer: ePAY Overview \(illinoistreasurer.gov\)](https://illinoistreasurer.gov)
 - c. [IL ABLE Accounts for Individuals with Disabilities | IL ABLE \(illinoisable.com\)](https://illinoisable.com)
 - d. [Illinois Secure Choice \(ilsecurechoice.com\)](https://ilsecurechoice.com)
 - e. [Illinois Unclaimed Property – Official State Site \(illinoistreasurer.gov\)](https://illinoistreasurer.gov)

Other contractors of the Treasurer’s Office support the College Savings programs:

- <https://illinoisfirststeps.com/>
- <https://brightstart.com/>
- <https://brightdirections.com/>

3. You mentioned you are moving from Mailjet to Mailchimp. Can you confirm when you expect that transition to occur?

The Treasurer's Office anticipates transitioning the email platforms by September 2024. To be clear, the Treasurer's Office, though, desires that Respondents propose the email marketing solution that they feel would best serve the Treasurer's Office, even if that is ultimately a different solution.

4. Could we get a little more detail on your expectations for the marketing agency with regard to Salesforce? Are you expecting us to provide the level of management and guidance that a Salesforce Certified Administrator provides? Or is it more about making recommendations for strategies for using Salesforce and Mailchimp in tandem?

No, the Treasurer's Office does not require the Contractor to be a Salesforce Certified Administrator. The Contractor, however, must have experience with Customer Relationship Management ("CRM") tools. The Contractor must be able to build marketing strategies that will incorporate email and other channels. The Contractor should be able to recommend how the CRM segments individual contacts so those audiences can be effectively integrated with those strategies.

5. Can you confirm the specific Salesforce services/package you are using today (or plan to use after the Mailchimp transition)?

The Treasurer's Office currently is licensed for the Sales and Service Cloud Enterprise Edition. Salesforce is used primarily for ePAY and Civic Engagement. The Office intends to integrate Salesforce with MailChimp and use it as our constituent management system. The Office does not use Salesforce marketing cloud services.

6. What are your main goals for this marketing plan? What are the key actions among your audience you're trying to incite as it relates to each program?

The Treasurer's Office wishes to work with a Contractor selected through this RFP to develop a comprehensive marketing strategy for all its programs. A key goal for all programs is activation, though the Treasurer's Office then also desires ongoing engagement.

As specific examples of intended activation, College Savings, Secure Choice, IL ABLE, and Financial Education all require a constituent to create an account. A constituent would need to open an account on the Treasurer's Office's Financial Wellness Hub to access lessons and tools to improve their financial literacy. For Secure Choice, College Savings and ABLE, the Treasurer's Office's goal is that a potential saver would open an account, understand the value in financial planning, and to consistently contribute to the account. Therefore, the Treasurer's Office anticipates that marketing efforts for these programs would encourage constituents to create accounts.

If additionally helpful, please see specific numbers below that exemplify growth opportunities:

- With ePAY, local governments use the Treasurer’s Office as a full-service electronic payment system. The state of Illinois has more than 8,000 bodies of government, less than 600 of which use ePAY.
- Secure Choice has 150,000 savers of the approximately 1 million employees that do not have access to a retirement program through their employer.
- Unclaimed property currently holds more than \$5 billion, and in 2023 paid more than 313,000 claims totaling \$276 million.

7. Do you use a service (similar to what you get from Civis Analytics for College Savings) for the audiences for these programs?

The Treasurer’s Office has worked directly only with Civis Analytics, Inc. External program managers for Treasurer’s Office programs, and the marketing firms with which they may work, have engaged with other firms, and some program managers have their own internal data analytics teams.

8. Please confirm how many examples you want in answer to questions IV.B.7 and IV.B.8.

Please see Addendum 1, published concurrently with this Addendum 2. If possible, please provide at least three such representative clients and contracts, respectively.