

Memorandum

To: Prospective Offerors

From: Vern Shird, Procurement Officer

Re: Questions and Answers for the Marketing Services RFP

Dated: June 20, 2024

Q1. For each creative project on the form (i.e., brochure, display, television spot, radio spot, etc.), unless a quantity is specifically noted, should we base our pricing on producing just one final creative design of each of those things? One brochure, one TV spot, one Digital Video spot, etc.?

A1. Yes. There is a note to consider 3 rounds of revisions for each tv and radio spot.

Q2. The RFP outlines a goal of promoting all three savings programs - MCIP, MDABLE and Save4College - so we weren't sure if each program needs its own materials, or if all three programs would be promoted in the same brochure, same TV spot, same radio spot, etc.

A2. As mentioned during the Preproposal conference, we have a small budget for ABLE. The majority of our budget dollars will be allocated to promoting the Maryland College Investment Plan.

Q3. Also, for TV spots, you list different lengths (:30 second and :15 second). Should be price that based on the assumption that the :30-second spot would be the "master spot" and include the bulk of the creative development fees, and then the shorter :15-second spot would just be edited from the master spot? Or do we need to price those as completely independent project requests? So our price for a :30-second TV spot would be completely separate from a :15-second spot and both would need to include the full creative development and production fees? I have the same general question about the multiple radio spots listed too.

A3. The :30 sec spot is master spot, :15 would be an edited version. Same applies to radio.

Q4. For Section F, which states that the offeror must respond to 'each RFP requirement (RFP Section 2 and Section 3),' please clarify the expectations for responding to Section 3 titled '3 Contractor Requirements: General.' Specifically, should offerors provide an affirmative response confirming compliance with each subsection 3.1 through 3.15? Or is it sufficient for the offeror to indicate it will comply with all the general requirements listed in Section 3?

A4. The offerors need to acknowledge that they will comply with subsections of Section 3; however, there are some subsections of Section 3 that are to be fulfilled after the recommendation of award has been made. Section 3.10 shall be addressed in detail by the Offeror as it is evaluated as part of the Technical Proposal as per Section 6.2.

Q5. Is there a page limit or other formatting requirements for the response?

A5. There is no page limit. We just want the requirements addressed as per the RFP. Any formatting is specified in Section 5 "Proposal Format".

Q6. Is the 9% MBE subcontracting goal based on the total contract value with the state, including media buy?

A6. The 9% MBE goal is based on the total contract value, which includes the media buy.

Q7. Should we include the cost of printing in our pricing estimates? And, if so, what quantities should we base our printing estimates on?

A7. The printing costs should be included in the amounts entered on the bid form for “Print Collateral/Outdoor”. These costs should be based on the quantities cited. There are areas cited in which printing costs do not apply: Handouts/Infographics (please quote design only), and Annual Report Design (please quote design only).

Q8. Can we suggest marketing services in the Technical Proposal (Volume One) that are not included in the pricing form provided for the Financial Proposal (Volume II)? Conversely, must we provide a price for every marketing service listed in the pricing form, even if we don't recommend it as part of our solution in our Technical Proposal?

A8. The Offeror is free to make suggestions, but their financials need to adhere to what was requested on the form. If oral presentations are held, then it will provide an opportunity for the Offeror to present the suggestions in greater detail. If the Offeror is awarded the contract, it will be at the discretion of MD529 whether these suggestions will be considered once the contract starts. The financial proposal must be completed in its entirety for the review committee to fairly evaluate and compare estimates provided by all bidders. The services listed are for evaluation purposes only and estimates provided for services are not indicative that every service will be utilized in future marketing campaigns.

Q9. Are there any specific roles you would like us to include regarding key personnel?

A9. Please see section 3.10 of the RFP. It is up to the bidder if they want to list any key personnel in addition to what is stated in the RFP.

Q10. Could you please clarify which section of the proposal you'd like us to include case studies for similar projects?

A10. The inclusion of case studies can be included in the technical proposal, but it is up to the bidder to decide where they would want to cite the case study.

Q11. To provide a better understanding of our capabilities, we would like to consider including links to relevant online examples, such as motion graphic videos. Would you be receptive to this approach?

A11 Yes.

Q12. RFP, page 39, section 4.33 Non Visual Access. The RFP states that this solicitation does not contain IT provisions requiring Nonvisual Access. However, the Evaluation Criteria on page 51 references satisfaction of the Nonvisual Access requirements. Please confirm that this is not a requirement and will not be used as an evaluation factor.

A12. The solicitation does not contain IT provisions requiring Nonvisual Access. It will NOT be used as an evaluation factor. Its appearance on page 51 is part of the RFP boilerplate.

Q13. RFP Attachment M, Contract, page 87, Section 40, Limited English Proficiency. To comply with this provision, is there a requirement to develop materials in multiple languages that are applicable to the MD population such as Spanish, French, Cantonese, etc.?

A13. Attachment M Section 40 is part of the Contract boilerplate and pertains to the company's services to clients and is related to civil rights/non-discrimination compliance. The Contractor will be notified of any future marketing campaigns or materials geared towards limited/non-English speakers and a contract amendment would be done.

Q14. Is MD529 open to other media tactics not identified in the RFP?

A14. Yes. Any recommendations can be included in the technical proposal/oral presentations.

Q15. Is the MD529 website maintained internally?

A15. Yes, although we may need assistance in wireframe development for new content.

Q16. Financial Proposal Form. Please clarify that you only want (2) focus groups for the entire state. If so, is that one for the Baltimore Metro area and one for the DC Metro area?

A16. The focus group audience can be a combination of the Baltimore/DC metro area, but should only be inclusive of counties within Maryland, not of state.

Q17. Does MD529 participate in public outreach events, and if so, is any outreach to be factored into the proposal?

A17. We manage public outreach events internally but are open to suggestions bidders may have for outreach if they want to include additional recommendations in the technical proposal.

Q18. Financial Proposal Form. We see that there is a line on the form for media commission. Typically Digital Media is only billed at Net. Is all media to be billed at Gross with an agency commission factored in?

A18. If your agency does not charge a commission for digital media, then enter 0 for that row.

Q19. Is the incumbent also invited to bid on this project?

A19. We do not discuss or reveal which vendors were solicited.

Q20. We are an SBR and certified Maryland MBE. Do we still need to bring in an MBE subcontractor, or would our MBE status satisfy the 9% MBE Subcontracting Goal?

A20. If a prime contractor is also an MBE, then the prime can satisfy up to 50% of the MBE subcontracting goal by providing services marked to be MBE subcontracted. Another MBE would have to satisfy the remaining portion of the goal.

Q21. Are all subcontractors utilized also required to be certified small business vendors?

A21. No, just the prime contractor is required to be an SBR.

Q22. Regarding the \$2 million advertising-related billings minimum requirement, does this refer to \$2M in media spend managed? Or can this also include services related to advertising (i.e. strategy, creative development, management, reporting)?

A22. This is includes all services related to advertising.

Q23. Related to question 2 above, is the prime required to meet the minimum \$2 million in advertising-related billings or would a subcontractor with that qualification count toward this minimum requirement?

A23. The prime is required to meet all minimum qualifications of the RFP.

Q24. How do you foresee Years 2-5 evolving? We see in the Financial Proposal Form that TV and radio ad spots will have new creative in Years 1, 3, and 5 - are you expecting all other print and digital collateral to be redesigned in all years, or also only in Years 1, 3, and 5?

A24. We typically update materials annually but not all materials require a full redesign.

Q25. Print Collateral: Should pricing for printed pieces that include estimated quantities (Trifold Brochure, Prospect Mailers, Annual Report Summary Design) include projected printing costs, or only design costs?

A25. Printing costs should be included unless the line item specifically states otherwise (i.e Handouts/Infographics, Annual Report Design).

Q26. Prospect Mailers: Is the selected partner responsible for acquiring mailing addresses and coordinating mailings of the Prospect Mailers, or do you have an existing partner that handles this?

A26. The selected partner will only need to produce and coordinate the mailers.

Q27. Outdoor Billboard: Should the pricing for Outdoor Billboard Design and Production include costs to coordinate with billboard vendors? Or would you prefer that cost fall under the Outdoor Advertising Commission section of the Financial Proposal?

A27. Pricing for design and production should only include expenses related to design and production.

Q28. Digital Video: What is the primary goal of the Digital Video for YouTube or Web?

A28. Depending on the audience we are targeting, our videos are used to build brand awareness, drive an action (i.e. apply for the State Contribution Program) or educate the audience on a specific topic.

Q29. Do you have a preference as to the style of the video (animation vs. live talent)?

A29. No.

Q30. Costs can vary greatly depending on the video style, so some direction here would be helpful to properly scope this deliverable.

A30. While we recognize costs can vary on the style of video selected, it is up to the vendor to make the appropriate recommendation. Additional information supporting the recommendation may be included in the technical proposal.

Q31. Email: What email platform does Maryland 529 use to send emails and newsletters? How many bespoke email campaigns do you plan to send each year that would require writing and design?

A31. A monthly e-newsletter for Maryland College Investment Plan is written and distributed by the Program Manager and a quarterly e-newsletter is written and distributed by the Maryland ABLE communications staff. The selected vendor will be responsible for developing an email template that aligns with Maryland 529 brand guidelines.

Q32. Webinar Video: Do you have an example of an existing Webinar Video to share to better understand the type of content that will be featured? Will these primarily be a narrated + slide deck format, or are you looking for a more produced video with animation, on-screen graphics, and/or live talent? Does this scope include assistance launching and hosting the webinar, or just video development?

A32. We do not currently have a webinar video, but we are seeking to build a library of pre-recorded presentations (primarily slide deck and narration). We will only need assistance in development/production. These videos will eventually be posted on the Maryland529 and Maryland ABLE websites.

Q33. Social Media: How many/which platforms are you looking for the selected partner to support? Can you elaborate on the contractor's responsibilities related to "review and support" in the Financial Proposal Form? Is the selected partner expected to develop social media calendars/posts, and will we also be responsible for managing questions, complaints, etc.? Or does "review and support" simply mean that the selected partner would be collaborating with your communications team on strategy, but not actually developing or managing organic social media content?

A33. The selected partner would collaborate with our communications teams, not develop or manage organic social media content.

Q34. Press releases: How many press releases do you expect to distribute per month? What about proactive pitching, news jacking story angles, etc.?

A34. We typically distribute releases around a specific event (i.e. launch of the State Contribution Program) roughly once a quarter between the College Investment Plan and Maryland ABLE. We will need assistance in proactive pitching and news angles.

Q35. Crisis Communications: Will this be crisis communication plan development, or reactive support should something arise?

A35. We are seeking support for both development and response.

Q36. Market Research: What do you anticipate as the project's minimum and maximum research budget? Do you have distinct research configurations you're already thinking about that can inform scope?

A36. We don't have a minimum or maximum budget for this component. It is up to the Offeror to determine the rate and the hours set aside to fulfill the needs specified in Section 2.3.2 of the RFP.

Q37. Campaign Testing: To what extent would you like regular content/creative testing on collateral produced? There is no line item for this that we can see in the Financial Proposal Form, so please let us know if there is a preference for where to include this if it's desired.

A37. You may include any recommendations you may have in the technical proposal.

Q38. Market Study: Can you share any additional information about what you expect this to entail, as well as any data or resources available to evaluate and analyze the 529 market in Maryland?

A38. Data is available in the Annual Report. Ultimately, it is up to the Offeror to develop market research as specified in Section 2.3.2.C.

Pre-Proposal Conference Attendee List (includes vendors who identified themselves as MBE subcontractor vendors):

Reid Media Group (Randy Reid – reidmediagroup@gmail.com)
Outright (Anne Davis – anne@weareoutright.com and Jared Schwartz – jared@weareoutright.com)
Magnitude of Change (Virginia Gallner - virginia.gallner@magnitudeofchange.com)
Basis Technologies (Heather Spinner – heather.spinner@basis.com)
360 Advertising & Communications (Sandra Gabriel – sandra@360aacc.com)
The Boss Blueprint Agency (Gabriella Cray – hello@payneconsulting.co) (MBE sub)
Hermann Advertising (John Albert - john@herrmann.com)
EffecTV (Daniel Narsh – Daniel_narsh@comcast.com and Brittany Golibart – Brittany_golibart@comcast.com)
Mad Girl Marketing (Nicole Hearn – nicole@madgirlmarketing.com and Anne Nyberg – anne@madgirlmarketing.com)
Curly Red (Kendall Ludwig – kendall@curlyred.com) (MBE sub)
The Research (SW Lee - swlee@thereasearch.com) (MBE sub)
Envision Creative Art (Ayisha Thompson – ayisha@envisioncreativeart.com) (MBE sub)
Marketing for Change (Marni Rosen – marni.rosen@forchange.agency)
Phoenix Lifestyle Marketing Group (Corey Barnes – cbarnes@phoenixlmg.com)
Spero Studio Group (Jenelle Coy – jenelle@sperostudio.com)
Sahara Communications (Ellis Harcum – eharcum@saharainc.net)
Gud Marketing (Matthew Lantz – lantz@gudmarketing.com)
The Hatcher Group (Lily Brock – lbrock@thehatchergroup.com and Cate Watson – cwatson@thehatchergroup.com and Bernadette Davis – bdavis@thehatchergroup.com)
Montage Marketing Group (Marada Chau – mchau@montagemarketinggroup.com and Erika Boughter – eboughter@montagemarketinggroup.com)
Abel Communications (Greg Abel – greg@abelcommunications.com)
Impact Marketing (Kelsey Hicks – khicks@impactmarketing.com)
7 Elements (Angela Pearson – angela@sevenelements.com and Warren Blanchard – warren@sevenelements.com)
Media Works (Michele Selby – mselby@medialtd.com and Amy Ward – award@medialtd.com)
Abrado Analytics (Lisa Van Wormer – lisa@abradoanalytics.com) (MBE sub)
A and M Financial LLC (Solomon Paul – spaul@aandmfinancialllc.com)

