



Indiana Education Savings Authority

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Request for Proposals (RFP) For Marketing Services

QUESTIONS & ANSWERS (3.15.23)

Q: [Firm] When submitting our proposal, may we provide our creative samples via an online landing page accessible by embedded link?

A: **The standard format for proposals calls for the submission of the Technical Proposal and all attachments to be in PDF format (RFP page 9). The Technical Proposal, which includes the examples of work for similar clients must not exceed 15 pages (RFP page 11). While a link would provide a more hospitable environment to exhibit the depth and dynamic nature of the examples, please keep all materials within the PDF. We understand the challenges of this format, and your ability to adapt is appreciated.**

Q: [Firm] Is your budget inclusive of media buys as well?

A: **Yes**

Q: [Firm] Could you let us know if you have a local preference or are you open to a Canadian agency that has done similar work with clients across the United States, with some currently being the States of California, Colorado and Wyoming?

A: **The expectation is that the agency selected will have a strong working knowledge of the state of Indiana, including the nuances of marketing in different regions of the state. In addition, the MINIMUM REQUIREMENTS (beginning on page 7 of the RFP) include the following: Registration to do Business. Providers must be registered, and be in good standing, with the Indiana Secretary of State (IC 5-22-16-4). Vendors may do so at <http://www.in.gov/sos/business/3648.htm>.**

Q: [Firm] With the 2023 Budget being set at \$500,000, what consideration will be given to cost of services as it relates to the selection criteria?

A: **The 2023 Budget is approximately \$1,000,000 (RFP page 4), while the share for this contract is a minimum of \$500,000 for July through December. We expect to pay a fair price for services.**

Q: [Firm] What is the weight of each evaluation criteria? Or are they to be treated as equal with no real hierarchy?

A: **They are treated equal with no real hierarchy.**

Q: [Firm] Does the agency that completed the branding under the previous RFP have any preference with regarding to this RFP for marketing services?

A: **No.**

Q: [Firm] Can Attachment A be electronically signed or does it require a wet signature?

A: It can be signed electronically.

Q: [Firm] It states that Ascensus provides the public-facing sites, and the CD Plan's public-facing website is developed and maintained by NexBank. If we want to develop individual landing pages for our campaigns, would we provide just design mockups for them to implement, or would we have access to implement? Would all new content go on the existing site, and would Ascensus (sic) be responsible for posting? Do these sites have analytics, and would we have access?

A: The Agency would provide mockups to Ascensus to implement. New content would go on the existing site, and Ascensus would post. These sites have Google analytics and appropriate access would be granted.

Q: [Firm] Would we be provided with admin access to your social sites, or if you currently are using social technology, access to the platform you are using?

A: Yes.

Q: [Firm] Do you currently have a contact with any media buyers or partners we would be required to use, and if so, can you share their point of contact?

A: Not at the moment. If that changes, the information would be shared with applicants as appropriate.

Q: [Firm] Do you currently have a CRM or Marketing platform you use for outbound and inbound drip campaign management?

A: The Authority does not. Ascensus uses Salesforce Marketing Cloud.

Q: [Firm] Do you have your analytics report from last year or any other marketing analytics that could provide us a better look into user behavior and analysis for our proposal?

A: Analytics will not be provided during the RFP process, but the awarded agency will have access to all available data once the contract is signed.

Q: [Firm] Can you outline the percentage of accounts that are open in the Direct Plan vs. Advisor Plan vs. CD Plan?

A: Rounding to whole numbers: Direct is 58%, Advisor 42%, and CD less than 1%.

Q: [Firm] To respond to the request to provide all state or municipal references for us and contractor(s), may we include this information in an addendum?

A: The Authority does not recognize the restated request to provide "all state or municipal references" from the RFP. We do ask for Similar Work Experience and that subcontractors be identified under Plan of Service (RFP page 11). These items are part of the Technical Proposal which must not exceed 15 pages (RFP page 11).

Q: [Firm] Can you provide the average age for the individual who has an account opened in their name?

A: Average Beneficiary Age: Direct: 13.05; Advisor: 14.63; CD: 15

Q: [Firm] Could you please provide a copy of the brand standards?

A: **Yes. The CollegeChoice Direct, Advisor, and CD style guides will be available for download at <https://www.in.gov/tos/iesa> through the RFP deadline.**

Q: [Firm] Section C. SCHEDULE OF EVENTS on Page 4 does not indicate the dates for the Selection of the Preferred Business and State of the Preferred Business. Can you please supply those dates?

A: **Those dates are not set.**

Q: [Firm] With regard to state or municipal references, do we need to list every one we work with?

A: **No. Aside from your three references (RFP page 11), we're specifically looking for examples of marketing a retail financial product.**
