

BOARD RESPONSE TO WRITTEN REQUESTS FOR CLARIFICATION

RELATING TO:

Invitation to Negotiate

Advertising, Digital Marketing, Partnerships and Public Relations Services for the Florida Prepaid  
College Board, ABLE United, and the Florida Prepaid College Foundation

# 25-02

December 18, 2025

Florida Prepaid College Board  
1801 Hermitage Blvd., Suite 210  
Tallahassee, Florida 32308  
(850) 488-8514

Memorandum

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To: Prospective Respondents, ITN 25-02

From: Florida Prepaid College Board

Date: December 18, 2025

Subject: Board Response to Written Requests for Clarification relating to ITN 25-02: Advertising, Digital Marketing, Partnerships and Public Relations Services for the Florida Prepaid College Board, ABLE United, and the Florida Prepaid College Foundation

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Any questions concerning conditions and specifications of this ITN were required to be submitted in the form of written questions, on the Request for Clarification Form, and pursuant to the schedule in Section 2.01. Please note, if any of these requirements were not met, the questions may not be included in the answer section below.

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## McCANN

Question	RFQ Section	RFQ Page	Question/Comment
1.	Misc.		<p>We are interested in participating in the upcoming ITIN for the FPCB and would like to review the pitch records from 2020, when a similar ITIN was launched.</p> <p>Could you please advise us on the procedure to request this documentation?</p>
The records submitted by prospective vendors in the 2020 procurement are public records. The records may be requested by submitting a request to the Florida Prepaid College Board's records custodian, and will be produced in a reasonable time, subject to redactions of exempt or confidential information. During this procurement, the Board's records custodian may be reached at <a href="mailto:ITNinfo.prepaid@MyFloridaPrepaid.com">ITNinfo.prepaid@MyFloridaPrepaid.com</a> .			

## Socially Loud

Question	RFQ Section	RFQ Page	Question/Comment
	Minimum Qualifications	1.03 / Appendix B Tab 2	Please confirm whether regulated financial services experience specifically work for Bank of America and BrightStar Credit Union, satisfies the requirement for "five years of experience within the financial services industry."
Confirmed, the ITN states only that respondents must have "five years of experience within the financial services industry" and does not limit or define the type of financial institution.			
	Minimum Qualifications	1.03 / Appendix B Tab 2	Please clarify whether the \$15M annual billings requirement applies to: (a) the Respondent agency overall, OR (b) billings specific to the Advertising/Creative/Digital/Social component only.
<p>The \$15M annual billings requirement applies specifically to the services within the component being addressed, not to the agency's total company-wide billings.</p> <p>The ITN states that Respondents must have "minimum annual billings providing the following services... Advertising and Creative Services, Digital Marketing, and Social Media Services: \$15,000,000."</p>			
	Minimum Qualifications	1.03 / Appendix B Tab 2	For the \$5M annual billings requirement for Public Relations/Partnerships/Events, please confirm whether "billings" refers to retainer + passthrough fees, or retainer-only.
The \$5M annual billings requirement for Public Relations/Partnerships/Events refers to total billings for those services, which may include both retainer and passthrough fees, as long as they are directly associated with providing the required PR/partnerships/events services.			
	Pricing Schedule	Appendix B Tab 5	Please clarify whether production costs (e.g., video, photography, talent, post-production) should be included in the monthly retainer or treated as project-based reimbursables.
<p>Production costs such as video, photography, talent, and post-production should not be included in the monthly retainer.</p> <p>The ITN lists these items under Project-Based Services, which are outside the scope of the retainer and must be billed separately as passthrough or hourly, with prior written approval.</p>			
	Pricing Schedule	Pricing Schedule	Please clarify whether hourly rates submitted should be fully burdened (inclusive of overhead) or direct labor only.
<p>The ITN does not specify a separate category for direct labor versus overhead, nor does it request unburdened rates.</p> <p>Accordingly, hourly rates should be submitted as fully burdened rates (inclusive of overhead and all standard cost factors), representing the total hourly cost the Board would pay for each role.</p>			
	Subcontractors	Appendix A: Contract §12	Please confirm the timing for providing subcontractor documentation at submission of the ITN Response or prior to contract execution.

The ITN does not require subcontractor documentation at the time of Response submission. Under the sample contract, subcontractor materials are provided later, as all subcontractors must receive the Board's prior written approval before any subcontract is executed.			
	CRM Access	ITN 3.01 (Web, UX & Analytics)	Please provide detail regarding the level of access to Salesforce/Marketing Cloud and other CRM components that the selected Respondent(s) will receive.
Limited access to Salesforce/Marketing Cloud and other CRM components will be provided based on project needs, security considerations, and Board approval.			
	Ownership of Materials	Appendix A: Contract §7	Please confirm whether the Board will require ownership of all editable design and production files (e.g., PSD, AI, INDD, project files), in addition to final exported formats.
Confirmed. Yes, the Board requires ownership of the materials and all formats.			
	Use of AI	ITN 3.01 / AI Section	Please confirm which AI tools/platforms are permitted under State of Florida privacy, data security, and public records requirements.
The Board currently uses AI tools such as ChatGPT and Microsoft Copilot. We are open to discussing any additional AI tools Respondents use, provided they comply with State of Florida privacy, data-security, and public-records requirements.			
	Crisis Communications	ITN Component 2: PR	Please clarify whether crisis communications support should be priced within the retainer or billed hourly as needed.
Crisis communications support is included in the retainer. In the ITN's description of Strategic Planning services, the Board specifies that Respondents must provide "executive counsel... including incident response support and communications" as part of the retainer services.			
	Oral Presentations	Section 5.06 (if applicable)	Please confirm whether oral presentations, if requested, will be conducted in-person in Tallahassee or virtually.
The ITN team will determine whether meetings and presentations are held in-person in Tallahassee or virtually and will provide that direction at the appropriate time.			

## Sachs Media

Question	RFQ Section	RFQ Page	Question/Comment
1.	1.01 Introduction	1–3	Can the Board clarify the relative strategic emphasis among the Florida Prepaid Plan, the Florida 529 Savings (Investment) Plan, ABLE United, and the Foundation over the next 3–5 years?
The ITN indicates that the Prepaid and Investment Plans remain the largest and most resource-intensive, ABLE United is entering a major expansion period, and the Foundation is strategically evolving and increasing its marketing activity. The Board expects respondents to tailor strategies to each entity's stage of growth rather than follow a fixed emphasis hierarchy.			
2.	1.01 Introduction	1–3	Should Respondents position Prepaid and Savings Plans with unified messaging or maintain distinct streams?
Respondents may use unified messaging when appropriate and maintain distinct messaging where needed, as long as both approaches support the Board's overall strategic goals and clearly communicate each plan's value.			
3.	3.01 Services	7–9	Clarification regarding key enrollment periods, seasonal campaign cadences, and historical timing?
Florida Prepaid College Savings Plans has 3-5 distinct promotional campaigns throughout the year, in addition to year round efforts. Historically, Prepaid Plan Open Enrollment was from February - April, with the majority of paid media efforts associated with this campaign. However, Marketing efforts continue year round (e.g. events).  ABLE United has 1-2 distinct promotional campaigns each year, but also has year round Marketing efforts.			
4.	3.01 Strategic Planning	7	Clarify vendor ecosystem and interaction expectations with Salesforce partners.
The FPCB uses a network of key partners / vendors to achieve our goals. Marketing partners work alongside all vendors as needed, including our Salesforce and Salesforce Marketing Cloud partners.			
5.	3.01 Web/Analytics	8	Will Respondents receive direct access to Salesforce/Mktg Cloud for segmentation, journeys, reporting?
The appropriate level of access to Salesforce/Marketing Cloud and other CRM components will be provided based on project needs, security considerations, and Board approval.			
6.	3.01 Web/Analytics	8	What CMS platforms are used and will codebase documentation be provided?
The Board has two websites in WordPress and one in Webflow. The appropriate level of access to the code based documentation will be provided based on security workflow and project needs.			

7.	3.01 Pricing	6-12	Can budgets shift mid-year among programs based on evolving priorities?
Generally, budgets do not shift midyear as they are Board approved each fiscal year. However, priorities within a program budget can shift during the year with approval.			
8.	3.01 Media Planning	7	Should Respondents assume media buying is executed and billed through the firm?
Respondents may assume that media buying would be executed and billed through the firm subject to the Board's standard approval processes, unless an alternative arrangement is established during negotiations.			
9.	3.01 Project-Based	9-10	Does the Board anticipate significant upcoming project-based initiatives?
While no significant project-based initiatives are identified, the Board's always-growing programs may require project-based support as new priorities emerge.			
10.	3.01 Measurement	10-11	Request for priority KPIs by program.
Historical KPIs are included in the Marketing Plans in Appendix D - Resources - for both Florida Prepaid College Savings Plans as well as ABLE United.			
11.	3.01 Reporting	10-11	Preferred reporting format and expected granularity?
The Board welcomes proposals from respondents to meet the objectives of this ITN.			
12.	3.01 Events	11-13	Anticipated annual event volume and type?
Event strategy and volume can and will vary year to year.  Florida Prepaid College Savings attends/sponsors approximately 50-100 events, including museum partner events, pregnancy and family expos, etc. Some events are staffed by a network of trained Brand Ambassadors.  ABLE United attends/sponsors 50-100 events of all sizes, including legal/professional, family, as well as specific advocacy groups. Some events are staffed by a network of trained Brand Ambassadors			
13.	3.01 Social/Engagement	10-11	Expectations for influencer/ambassador sourcing and management?
The ITN includes influencer and ambassador sourcing and management within retainer and project-based activities, but specific expectations are not detailed and will be guided by Board direction.			
14.	3.01 Incident Response	7,10	Examples of incident-response needs for scoping?
Examples include: <ul style="list-style-type: none"> <li>An incident-response need could include assisting the Board with urgent customer communications following a service outage or system disruption.</li> <li>Helping craft rapid messaging if a vendor-related technical issue temporarily affects customer access to account information.</li> </ul>			

<ul style="list-style-type: none"> <li>• Supporting the Board with media statements and stakeholder updates in response to misinformation circulating online.</li> </ul>			
15.	5.05 Negotiation	15–16	Will coordination requirements be defined if two firms are selected?
Yes. Should two firms be awarded, the Board will outline how responsibilities, workflows, and collaboration should be managed.			
16.	3.02 Contract	13	Desired onboarding and transition timeline?
The Board anticipates onboard and transition between April and July 2026. The Board welcomes proposals from respondents to meet the objectives of this ITN.			
17.	3.01 Services	7–13	Will Respondents receive historical assets, analytics, creative, and reports?
The selected vendor(s) will receive these materials as part of the onboarding			
18.	1.03 Minimum Qualifications	4	In the last ITN in 2019, the minimum gross billing qualification was \$5M. What is driving the significant increase to \$15M?
The marketing budget has more than doubled over the past six years, as the scope has continued to grow.			
19.	1.03 Minimum Qualifications	4	Can a responding firm partner with another firm to meet the advertising minimum gross revenue if the meet or exceed the PR gross revenue to be considered for both?
The ITN requirements do not permit the combining or aggregating of experience of multiple entities. The definitions of Respondent in PUR 1001 only contemplates a single entity submitting materials to the buyer. The ITN does not expand this definition but applies a restriction limiting submissions by a Respondents and Related Entities to a single submission. The question presupposes that subcontractors and subconsultants are Related Entities; however, neither the definition of Respondent nor Related Entities contemplates subcontractors or subconsultants as within their meaning.			
20.	NA	NA	Can you share a list of all firms that submitted questions?
All questions submitted are publicly available in the clarification documents, where they are organized by firm for transparency.			
21.	NA	NA	Who is the incumbent agency and how long have they had the contract?
St. John & Partners – since 2014 The Moore Agency – since 2014			

## Ai MediaGroup

Question	RFQ Section	RFQ Page	Question/Comment
1.	3.01(A) #2	9	Can the Board clarify the average annual volume of creative assets expected (e.g., number of campaign concepts, videos, digital ads, direct mail pieces, etc.) across all three entities: Prepaid/Investment, ABLE, United Foundation
The volume of assets can vary from year to year.			
For example,			
FPCSP frequently has 3-5 distinct campaigns each year, and this could include 300-400+ digital assets, 15-20+ video assets, digital / printed collateral, plus several direct mail campaigns each year.			
ABLE United has approximately 1-2 distinct campaigns each year, 50-100 digital assets, 10+video assets, plus digital / printed collateral.			
The Foundation scope for the coming year will be determined through strategic creative exercises with our partners.			
2.	3.01(A) #4	9	Are all websites currently on the same CMS or platform (e.g., WordPress, Drupal, proprietary system), and is there a single development partner managing core functionality?
The marketing websites are built and managed by our ADVERTISING AND CREATIVE SERVICES, DIGITAL MARKETING AND SOCIAL MEDIA SERVICES partner. Two sites are built in WordPress and one is built in Webflow. The managing firm is responsible for all website development work as well as maintenance and reporting.			
3.	3.01(A) #5	10	Can the Board confirm which social platforms are currently in use for each brand, and how many active profiles have been managed to date (e.g., Facebook, Instagram, LinkedIn, X, YouTube)
The Board currently has the following active social media profiles:			
FPCSP: Facebook, Instagram, YouTube and LinkedIn			
ABLE United: Facebook, Instagram, YouTube and LinkedIn			
Foundation: LinkedIn			
4.	N/A	8-9	Are there existing documented audience personas, tone of voice guides, or editorial

			calendars that will be shared with the selected agency, or will creation of these foundational tools be expected as part of the engagement?
<p>Any available materials will be shared during onboarding, and creation or refinement of foundational tools may be expected as part of the engagement and Respondents should be prepared to develop or update these tools if needed.</p>			
5.	1.01	3	Will the agency be expected to configure dashboards or reporting modules directly within Salesforce or will agencies deliver campaign performance data in a standardized format for internal teams to upload?
<p>The Board will determine whether dashboards are configured directly in Salesforce or whether agencies should submit standardized reports.</p> <p>In general, the Board tries to centralize data in Salesforce but the Board recognizes that, in some cases, agencies may need to provide standardized reports instead.</p>			
6.	1.01	4	As services for the Foundation are mostly listed as passthrough/hourly, could the Board clarify the estimated scope or volume of campaign support expected annually for the Foundation specifically?
<p>The total marketing budget for the Foundation is expected to range between \$1.0M and \$1.5M per year during the tenure of the contract resulting from this ITN.</p> <p>Detailed scope and/or campaigns will be developed in coordination with our Marketing partners.</p>			
7.	3.01(A) #5	10	Does the Board expect the agency to manage contracting, negotiation, compliance reviews, and payment processing for influencer partners?
<p>Yes. The agency should be prepared to manage contracting, negotiation, compliance reviews, and payment processing for influencer partners.</p>			
8.	3.01(A) #5	10	Are there existing procurement or legal requirements influencers must follow (e.g., state vendor registration, background checks, disclosure rules)?
<p>There are no specific legal requirements, however the Board does require social media influencers to be fully vetted, including a review of their content history, audience alignment, and overall reputation to ensure consistency with our mission. The Board also welcomes proposals from respondents to meet the objectives of this ITN.</p>			
9.	1.01 3.01(A) #2	4/9	Can the Board confirm whether compliance requirements are aligned with WCAG 2.1 AA standards for all marketing content, and whether there is an internal accessibility review team involved in asset approvals?

<p>Florida Prepaid follows WCAG AA 2.0 guidelines, and implements 2.1 - 2.3+ where applicable.</p> <p>Marketing firms are expected to monitor and review all assets for accessibility.</p> <p>All assets will be approved by the Board.</p>			
10.	2	5 and 13	Please clarify whether the response is to be delivered via email or delivered to the Tallahassee address on page 5?
<p>The ITN specifies that Responses must be delivered electronically via email to <a href="mailto:ITNinfo.Prepaid@MyFloridaPrepaid.com">ITNinfo.Prepaid@MyFloridaPrepaid.com</a>, not physically mailed or delivered.</p>			
11.	1.01 About the Board (Goals/KPIs) + 3.01(A) Measurement & Optimization	3 and 8	For each program (Prepaid/Investment, ABLE, Foundation), please confirm the 1-2 primary KPIs for Year 1, the priority order across brand awareness, enrollment volume, CAC/CPA efficiency, dual-plan adoption, and retention, and any numeric targets or internal success thresholds tied to those KPIs.
<p>Enrollment volume and historical KPIs are included in the Marketing Plans in Appendix D - Resources - for both Florida Prepaid College Savings Plans as well as ABLE United.</p>			
12.	1.01 About the Board (Budget)	3	Do the stated annual marketing budgets include agency retainers, production, and passthrough fees, or is paid media spend separate? Additionally, are these budgets guaranteed minimums or expected/historical ranges that may fluctuate based on legislative, enrollment, or market conditions?
<p>The listed annual marketing budgets include any retainer, production, and passthrough fees for each program, except where specifically listed in project-based services in the Description of Services within the ITN.</p> <p>The budgets are described as expected ranges, not guaranteed minimums, and are subject to change based on program needs or conditions.</p>			
13.	3.01(A) Strategic Planning	8	What is the Board's budget cycle and mid-year approval process for reallocating funds across channels/programs (timing, stakeholders, and thresholds requiring formal approval)?
<p>Budgets are approved by program each fiscal year. Any proposed adjustments to the approved budget across channels will be evaluated and approved as needed.</p>			
14.	3.01 Services / Award Structure	8	Are there any incumbent marketing partners supporting Component A and/or B today? If yes, what work is expected to transition to new partners vs. be net-new?

<p>Current incumbent marketing partners:            Advertising: St John &amp; Partners            Public Relations: The Moore Agency            All Marketing work will transition to the selected vendor(s). Scope is subject to change year to year.</p>			
15.	3.01(A) Paid Media Planning & Buying	8	Is the selected agency expected/allowed to execute all digital media buys directly (search, social, programmatic/DSP, CTV/OTT, audio), or are any digital buys reserved for another party and/or governed by existing platform agreements?
<p>The selected agency is expected to execute all paid media buys, including digital, social, programmatic, and emerging platforms, as part of the media planning and buying scope.</p>			
16.	3.01(A) Paid Media Planning & Buying	8	Does the Board have any preferred or required digital platforms/publishers for Year 1, and are there any platform constraints we should plan for (state contract pricing, brand-safety exclusions, restricted placements for 529/financial products, data-use limits, etc.)?
<p>We do currently have some brand safety exclusions in place, and we would expect the vendor to propose as needed.</p>			
17.	3.01(A) Creative & Content Development + Project-Based Services	8	Please confirm creative ownership and workflow: will the agency be responsible for conceiving and producing digital creative assets in-house (included in retainer), or will the Board provide creative for agency adaptation/trafficking? For larger project-based productions (custom video, photography, multimedia), does the Board anticipate using existing production vendors or should the agency assume full sourcing/management? Please also share typical asset cadence/volume by program.
<p>The agency is responsible for conceiving and producing creative assets for all programs as part of the retainer, except where specifically listed in project based services in the Description of Services within the ITN.</p> <p>FPCSP frequently has 3-5 distinct campaigns each year, and this could include 300-400+ digital assets, 15-20+ video assets, digital / printed collateral, plus several direct mail campaigns each year.</p> <p>ABLE United has approximately has 1-2 distinct campaigns each year, 50-100 digital assets, 10+video assets, plus digital / printed collateral.</p> <p>The Foundation scope for the coming year will be determined through strategic creative exercises with our partners.</p>			

18.	3.01(A) Creative & Content Development	8	What is the Board's creative review/approval process and expected turnaround times (including legal/compliance and ADA/accessibility checks) for digital assets, and are there any known blackout windows tied to enrollment periods?
The selected agency must coordinate internal review and approval processes and ensure ADA-compliant, proofread, and brand-consistent assets, but no timing or sequencing is provided.			
19.	3.01(A) Web, UX, and Analytics	8	For retainer "Web, UX, and Analytics," does scope include ongoing CRO/testing, new tool development, and/or maintenance of existing tools, versus strategy/reporting only?
The ITN explains that "Web, UX, and Analytics" includes hands-on activities such as maintaining and enhancing marketing websites, managing analytics and tracking, and supporting email strategy and audience segmentation. The scope is not limited to strategy, and while CRO or testing are not explicitly mentioned, they are not excluded.			
20.	3.01 Services (Retainer vs Passthrough)	8	For Foundation work marked Passthrough/Hourly, can the Board clarify the expected annual volume and monthly pacing of digital deliverables to inform staffing assumptions?
The Foundation scope for the coming year will be determined through strategic creative exercises with our partners.			
21.	1.01 About the Board / Appendix D (Enrollment + Promotions)	3	Appendix D notes year-round enrollment pending Board approval and includes incentive/promotion budgets. Can the Board confirm expected Year-1 enrollment calendar (including status/timing of year-round enrollment), and clarify who owns incentive design/approval and fulfillment, plus any performance guardrails digital should optimize toward during offer windows?
Year-round enrollment has been approved and planned for announcement in May 2026. Incentives are owned and fulfilled by the Board. No specific guardrails are noted beyond focusing on completed applications.			
22.	3.01(A) Paid Media Planning & Buying + Measurement	8	What audience/data sources are required or preferred (e.g., Resonate modules or other third-party audiences), and are there restrictions on targeting or lookalike use (especially for sensitive inference categories relevant to ABLE audiences)?
The Board uses Resonate + MRI for media planning, and ABLE uses Resonate Health for audience targeting. The Board welcomes proposals for audience/data sources from respondents to meet the objectives of this ITN.			

23.	3.01(A) Web/Analytics / Tagging & Attribution	8	What is the Board's current tagging and attribution standard (GA4, CM360, platform pixels, Salesforce attribution), and are there required attribution models or reporting templates the agency must follow?
The Board utilizes GA4, and is always open to enhanced measurement and reporting.			
24.	3.01(A) Social Media Services	8	Are there any organic/paid social guardrails we should follow (tone, response SLAs for community management, escalation rules, ADA/accessibility standards for posts), beyond standard brand guidelines?
The Board will train the social team and outline escalation procedures during onboarding.			
25.	4 Pricing / Appendix B Tab 5 + Appendix A Contract	N/A (Appendix)	Please clarify compensation mechanics: retainer vs hourly vs passthrough. Are fees invoiced separately from media or deducted from spend? Should hourly billing be role-based or blended, and is any management fee applied to passthrough work? Additionally, are there any Board-preferred AI tools/workflows or AI governance/disclosure requirements the agency must adhere to in producing creative, planning media, or using data?
Retainer work covers ongoing services, while project-based work is billed hourly or as passthrough at actual cost with prior approval. Fees are invoiced separately (not deducted from media), hourly billing is role-based, and no management fee is allowed on passthrough costs.			
26.	1.03 Minimum Qualifications for Respondents	4	Do businesses that are licensed in the state of Florida, with employees who both reside in Florida and have conducted business within the state for several years, satisfy the requirement outlined in Section 1.03 (Minimum Qualifications for Respondents) regarding maintaining a permanent and active place of business in Florida? For context, we maintain a Florida registered agent and mailing address.
The ITN requires a Respondent to affirm that it "maintains a permanent and active place of business in the state of Florida." Maintaining a registered agent and related mailing address, standing alone, is insufficient to meet this requirement. Employing Florida residents who perform the work of Respondent at a location in Florida where Respondent holds itself out as conducting its business would satisfy these requirements.			
27.	B	9	What are your primary goals for each entity?

<p><b>Florida Prepaid / Investment Plan:</b> Increase 529 plan sales, improve conversion and retention, expand awareness, and drive year-round engagement through full-funnel marketing.</p> <p><b>ABLE United:</b> Grow enrollments—especially with the expanded Age Adjustment Act audience—build trust, simplify the path to enrollment, and strengthen retention through personalized support.</p> <p><b>Florida Prepaid College Foundation:</b> Expand scholarship visibility, grow donor and partner engagement, and drive 529 scholarship plan sales.</p>			
<p>28. B 9 Given the different stages of evolution across Prepaid and Investment, ABLE United, and the Foundation, how do you envision cross-entity coordination working in practice? Should each operate with distinct PR programs, or is the goal a more integrated communications ecosystem?</p>			
<p>Each entity requires its own tailored program based on its unique audience and maturity. However, they also emphasize coordinated planning and shared messaging across all entities.</p>			
29.	B	9	Are there specific audiences or geographic regions within Florida that are underperforming or underserved today, where you would expect a PR and partnerships program to meaningfully shift awareness or enrollment?
<p>Yes. Appendix D highlights several high-opportunity counties where awareness and 529 participation lag, including areas with low category development or low brand development relative to population. These markets—such as parts of Duval, Pinellas, Pasco, Sarasota, and other low-CDI/BDI regions—are specifically identified as places where expanded outreach could meaningfully improve results.</p>			
30.	B. 1.	9	Are there upcoming legislative, enrollment or milestones we should be considering/integrating into our PR program?
<p>Yes.</p> <ul style="list-style-type: none"> <li>• Year-round Prepaid enrollment will potentially be announced May 2026.</li> <li>• ABLE Age Adjustment Act takes effect January 1, 2026, significantly expanding eligibility and requiring coordinated PR around launch.</li> </ul>			
31.	B.1.	9	How do your internal teams currently manage Salesforce-driven insights for communications, including audience segmentation, sentiment, and enrollment cycles, and what level of access or integration would you expect from an agency partner?
<p>Teams collaborate to identify areas of improvement. The appropriate level of access to Salesforce/Marketing Cloud and other CRM components will be provided based on project needs, security considerations, and Board approval.</p>			

31.	B.1.	9	What types of incident response support has been required in the past?
Examples of possible incident response support include: <ul style="list-style-type: none"> <li>• An incident-response need could include assisting the Board with urgent customer communications following a service outage or system disruption.</li> <li>• Helping craft rapid messaging if a vendor-related technical issue temporarily affects customer access to account information.</li> <li>• Supporting the Board with media statements and stakeholder updates in response to misinformation circulating online.</li> <li>•</li> </ul>			
32.	B.1.	9	Do you have an existing crisis preparedness plan in place or do you need your agency partner to build out?
Yes, we have an incident response plan.			
33.	B. 1 & 2	9 & 10	Are there messaging frameworks, compliance constraints or sensitive topics we should be aware of?
No. The Board welcomes messaging framework proposals from respondents to meet the objectives of this ITN.			
34.	B. 2.	10	Who are your key spokespeople across each entity (Prepaid, Investment, ABLE United)
<b>FPCSP:</b> Moore Agency spokesperson Kevin Thompson - Executive Director			
<b>ABLE United:</b> Moore Agency spokesperson John Finch - Director, ABLE United Kevin Thompson - Executive Director/CEO Will Thompson – Deputy Executive Director/President			
<b>Florida Prepaid College Foundation</b> Moore Agency spokesperson Cynthia F. O'Connell — Foundation Director Kevin Thompson - Executive Director/CEO Will Thompson – Deputy Executive Director/President			
35.	B.2.	10	Do all spokespeople require media training?
Yes, all new spokespeople require media training, and refreshers are required on occasion.			
36.	B. 3.	10	What partnerships do you currently have for each program? Which ones have been the most successful?

<p>Successful partnerships span state agencies, museums and zoos, daycares, schools, PTAs, and business/community organizations for Florida Prepaid, and advocacy groups, disability organizations, and events like Family Café for ABLE United. The Foundation attends many business and education oriented conferences.</p>			
37.	B.3.	10	Are there partner categories you want to grow (employers, schools, financial institutions, advocacy groups, PTOs, nonprofits)?
<p>Yes, Florida Prepaid is focused on growing integrated partnerships across hospitals and health-care providers, daycares/preschools, K-5 schools and PTAs/PTOs, state agencies, as well as expanding advocacy-group partnerships for ABLE United to focus on new expanded audiences.</p>			
38.	B.5.	10	Can you provide examples of some previous events? Were they successful/unsuccessful?
<p>Florida Prepaid and Investment focus on family events, including Prego Expo and Central Florida Family Expo. ABLE United focuses on various disability and advocacy group events, including Family Café. The Board evaluates event opportunities each year. Participation considerations include prior experience with the event and related outcomes.</p>			
39.	B.6.	11	For media monitoring and reporting, what level of granularity is most valuable to you? Do you prefer daily coverage summaries only, or deeper analytics such as sentiment, competitor benchmarking, and share of voice trends?
<p>Daily coverage reports, weekly summaries, and quarterly analyses that include sentiment, coverage quality, and industry/competitor monitoring.</p>			

## Infinite Source Communications Group, LLC

Question	ITN Section	RFQ Page	Question/Comment
1.			Could you clarify how the overall budget will be allocated between the Public Relations and Advertising components?
Budgets are presented at a program level, and PR vs. Advertising investment varies by program and plan year rather than through a predetermined split.			
2.			If an agency submits proposals for both components, will each component be evaluated independently?
Yes. The ITN states that each component is evaluated separately, with scoring done per component and shortlist selections made independently for each.			
3.			Regarding the minimum annual billing requirement (Item 2), if a prime contractor does not meet this threshold, is it permissible for the prime contractor and a subconsultant to combine their efforts to satisfy the requirement?
Yes.			
4.			Could you provide further clarification on what constitutes "relevant financial services experience" for meeting the minimum requirement? Does this criterion apply to the firm as a whole or to an individual within the firm?
"Relevant financial services experience" refers to the firm's overall experience in providing services to the financial sector, rather than the experience of an individual. This criterion applies to the firm as a whole, and the firm must demonstrate a minimum of five years of experience in providing the required services within the financial industry.			
5.			Is there a current incumbent for either of the two Florida Qualified Tuition Programs and/or ABLE United? If so, who are the incumbents, and do you anticipate that they will submit proposals?
Current incumbent marketing partners - Advertising: St John & Partners, Public Relations: The Moore Agency. The incumbents may submit proposals to this ITN.			
6.			Are the ABLE United and Florida Prepaid College Foundation budgets of \$1.5M-\$2M and \$1-\$1.5M respectively per year

			separate from, or included within, the overall budget of \$20M–\$25M?
The ABLE United budget of \$1.5M–\$2M and the Florida Prepaid College Foundation budget of \$1M–\$1.5M are separate from the overall Florida Prepaid marketing budget of \$20M–\$25M.			

## PPK, Inc.

Question	ITN Section	ITN Page	Question / Comment
1.	Appendix B	Pg 5	Given the Calendar Year plan and the start date of this new contract, should the agency's response to question Tab 3, Questions 5 & 6 be directed at the strategies in the CY26 plans within the ITN?
The agency's response to Tab 3, Questions 5 & 6 should be based on fiscal year 2027, starting July 1, 2026. The contract start date aligns with the start of the fiscal year.			
2.	Appendix B	Tab 3	With a large portion of the annual contract to be spent in paid media, how will the Board evaluate paid media capabilities and media buying value within this ITN?
The Board will evaluate paid media capabilities and media buying value considering factors like media buying strategy, cost-effectiveness, and the ability to optimize media spend. Media buying efficiency, as well as experience in managing significant budgets, will be aspects of the evaluation.			
3.	Appendix B	Tab 3	For Tab 3, questions 4, 5, and 6. Is it the expectation of the Board to review full proposed plans and work (slides, charts, graphs, visuals and/or video), or should the response be only a written narrative?
The expectation is to focus on a written narrative, detailing the agency's approach, strategies, and relevant experience. However, including visuals or supplementary materials that enhance the clarity and quality of the response may be beneficial if they are relevant to the narrative.			
4.	Appendix B	Tab 3	#5: For Recommended Strategic Changes—What deliverables in the response will best set up the Board for evaluation and negotiations? For example: are you looking for a fleshed-out Communications Strategy and plan, full-funnel Media Strategy and plan across all touchpoints, or just a written narrative?
For Recommended Strategic Changes (question #5), the Board expects a written narrative outlining your strategy. However, including visuals or supplementary materials that enhance the clarity and quality of the response may be beneficial if they are relevant to the narrative.			

5.	Appendix B	Question 5	Are budget reallocation recommendations allowed throughout the year within program boundaries?
Yes. Generally, budgets do not shift midyear as they are Board approved each fiscal year. However, priorities within a program budget can shift during the year with approval.			
6.	Appendix B	Tab 3	For questions 5 & 6, in order to provide strategic recommendations on the media plan, can you please provide a list of all current paid media assets?
Assets produced can vary year to year based on approved campaigns, however, generally include:  Digital/Programmatic Out-of-Home Broadcast/Cable TV Digital Video/Connected TV Radio/Streaming Audio/Podcasts Facebook/Instagram/Reddit Paid Social FB and Pinterest Lead Gen Digital Display/High Impact Units Paid Search Native			
7.	ITN 1.01	Pg 1	What is the Board's perception of what is working best for the consumer from the past year's plan? (Please answer this in regard to Prepaid program, Investment program, and ABLE United.)
The Prepaid and Investment Plan programs are seeing growth from a combination of the new Plan Builder tool on the Marketing website, in addition to a wide variety out paid, owned and earned efforts.  ABLE United is experiencing growth from a combination of events/presentations and direct outreach, in addition to a wide variety of paid, owned and earned efforts.			
8.	ITN 1.01	Pg 1	What is the Board's opinion on the greatest areas of opportunity to improve for the consumer? (Please answer this in regard to Prepaid program, Investment program, and ABLE United.)
The Board has recently made a wide variety of changes to the Florida Prepaid consumer experience. The Marketing vendors and Board will collaborate together to continue to enhance the user experience. ABLE United is launching a new Marketing website to meet the needs of the expanded audiences, and the Marketing vendors and Board will collaborate together to continue to enhance the user experience.			

9.	ITN 1.01	Pg 1	What is the Board's opinion of the efficacy of the current media plan?
The Board values a research driven approach for media plans. The Board welcomes proposals from respondents to meet the objectives of this ITN.			
10.	ITN 1.01	Pg 1	What would be the defined scope of the agency partner's integration with Salesforce?
The agency partner would support and leverage Salesforce as part of marketing operations, including CRM-driven customer journeys, email marketing, audience segmentation, analytics, and potential integration work tied to website enhancements or lead management. For ABLE United, the partner may also assist as the program explores Salesforce integration for CRM and records administration to support expanded audiences.			
11.	ITN 1.01	Pg 1	With the recent launch of a Salesforce-powered records administration and CRM system, a modern customer access portal, and a redesigned marketing website, the Board has created a digital-first foundation for scalable, data-driven engagement. Can you please provide details on what the current structure and consumer journey for the newly integrated CRM system are?
For Florida Prepaid, the CRM system captures leads, segments audiences, and automates emails and journeys from initial interest through enrollment and ongoing engagement. It connects to the customer portal and website to personalize messaging and track behavior, supporting onboarding, upsell, and retention.			
12.	ITN 1.01	Pg 1	We see in Appendix D that Carahsoft is the service provider for Salesforce. What, if any, hard costs are the responsibility of the Advertising agency to bear for integration with Carahsoft? If hard costs are the responsibility of the Advertising agency, what is the projected database growth rate and send rate costs you've outlined over the duration of this contract? This will help us with the pricing response.
The Salesforce components are purchased through Carahsoft and are not part of the Marketing contracts.			
13.	ITN 1.01	Pg 1	How does the Board prioritize between the Key Metrics provided: website traffic, conversion rate, customer acquisition cost (CAC), plan adoption, customer satisfaction and retention for (Prepaid)?

<p>The Board evaluates them collectively. Each metric supports a different stage of the full-funnel strategy—traffic and CAC for attracting prospects, conversion and plan adoption for decision-making, and satisfaction and retention for long-term engagement.</p>			
14.	ITN 1.01	Pg 2	How does the Board prioritize between the Key Metrics provided: website traffic, conversion, customer acquisition cost (CAC), and retention for (ABLE United)
<p>The Board evaluates them together across the full lifecycle—traffic and CAC for awareness and lead generation, conversion for enrollment performance, and retention for ongoing engagement.</p>			
15.	ITN 1.01	Pg 2	How many internal Salesforce/CRM resources does the Board have today, and what roles do they perform? Both seniority and skillset would be helpful to know.
<p>The Board utilizes the services of several vendors to manage the Salesforce platform, as well as Marketing Cloud, and can scale resources as necessary to achieve the Board's objectives.</p>			
16.	ITN 1.01	Pg 2	Are Foundation creative assets expected to maintain cohesive themes with Prepaid/Investment?
<p>All communications and event/engagement materials must align with Board branding and campaign goals, which implies a level of thematic consistency across programs without mandating identical creative. Foundation creative assets will be focused on bringing in new partners to purchase scholarships and students to apply for scholarships.</p>			
17.	ITN 1.01	Pg 2	<p>With the January 1, 2026 ABLE United expansion, can the Board estimate anticipated increases in:</p> <ul style="list-style-type: none"> <li>- Number of consumer journeys utilized</li> <li>- CRM audience size</li> <li>- Email frequency</li> <li>- Any expanded personalization requirements?</li> </ul>
<p>Although the audience size is growing, there will be minimal changes short term to the consumer journey or email frequency. They will be refined through the contract term based on experience and growth strategies.</p>			
18.	ITN 1.01	Pg 1-3	What are the current consumer funnels utilized in the various Salesforce-powered programs?
<p>Both Prepaid/Investment Plans and ABLE United utilize an attract - convert - retain funnel model.</p>			
19.	ITN 1.01	Pg 2	Will the vendor be expected to create new journeys specific to the Age Adjustment Act population for (caregivers, adults with disabilities, newly eligible segments)?

<p>There are currently journeys in place, but journeys evolve over time to meet needs of the program.</p>			
20.	ITN 1.01	Pg. 1-3	What Salesforce Clouds are currently deployed (Marketing Cloud, Sales, Service, Experience)?
<p>The Board uses the Salesforce platform including Financial Services Cloud (Service + Sales), Experience Cloud, Marketing Cloud, MuleSoft and other Salesforce products, which operate collectively as an enterprise transactional system.</p>			
21.	ITN 1.01	Pg. 1-3	Does the Board have existing journey maps for lifecycle marketing with FPCB, or should these be developed by the Contractor? FPCB explicitly lists new journey goals in Appendix D. ABLE United also references journey development but does not confirm if the strategy and journey have been established and approved.
<p>The Board has a Salesforce and Marketing Cloud journey roadmap. New journeys are currently in development for Prepaid / Investment programs.</p>			
<p>ABLE United has several Marketing journeys, and is currently using Mailchimp for email marketing.</p>			
22.	ITN 1.01	Pg. 1-3	If the Contractor is responsible for journey builds for FPCB and ABLE United, can the Board estimate the expected annual number of new journeys, revisions, or lifecycle automations (e.g., onboarding, at-risk, re-engagement, upsell) per brand?
<p>We cannot provide an estimated number of new / revised journeys, as journeys / emails can vary by year depending on current strategy. Each journey is evaluated regularly to continually improve results.</p>			
23.	ITN 1.01	Pg. 1-3	Does the Board expect the Contractor to propose and design the strategic journey architecture (logic, rules, paths) for both FPCB and ABLE United, or is strategic direction established internally? If the Contractor is responsible, how often is the Board looking to have this optimized annually for each brand?
<p>The vendor will collaborate with the Board to develop journey strategy and content. Currently, Salesforce and Salesforce Marketing Cloud vendors develop the actual journey builds in Marketing Cloud.</p>			

24.	ITN 1.01	Pg. 1-3	What level of Salesforce Marketing Cloud access will be granted to the Contractor (e.g., admin, developer, content editor, journey builder, analyst)?
The appropriate level of access to Salesforce/Marketing Cloud and other CRM components will be provided based on project needs, security considerations, and Board approval.			
25.	ITN 1.01	Pg. 1-3	Will the Contractor be expected to work directly within the Board's Salesforce instance, or will assets and logic be handed off for internal deployment?
The Contractor will have the appropriate level of access to work directly in Salesforce for specific projects and will collaborate with other Salesforce vendors when shared work or integrations are needed.			
26.	ITN 1.01	Pg. 1-3	Who is responsible for maintaining and updating audience segments and data extensions in Salesforce Marketing Cloud?
Currently, Salesforce and Salesforce Marketing Cloud vendors/partners develop the actual journey builds, segments and data extensions in Marketing Cloud.			
27.	ITN 1.01	Pg. 1-3	Who is expected to maintain the following integrations with Salesforce, the Contractor or the Board?  Websites Forms Preference centers Tagging or event systems Landing pages Third-party media platforms
The vendor will manage the set up and integration between the Marketing websites and Salesforce, in collaboration with current Salesforce vendors/partners.			
28.	ITN 1.01	Pg. 1-3	Are data feeds into Marketing Cloud (e.g., nightly syncs, behavioral triggers) already established, or will the Contractor be responsible for building and/or supporting these integrations?
All connections between Salesforce and Marketing Cloud are set up and maintained by Salesforce specific vendors/partners.			
29.	ITN 1.01	Pg. 1-3	Will the Contractor be responsible for QA testing of all journeys and triggered emails (render testing, device testing, deliverability, tracking validation)? If so, what are the current journeys and triggers currently in place?

<p>QA testing for all journeys is primarily handled by Salesforce specific vendors/partners, however the Marketing vendor may be involved as needed.</p>			
30.	ITN 1.01	Pg. 1-3	Does the Board have internal QA/compliance processes (e.g., accessibility review, legal review, content approval), and what is the expected role of the contractor in those workflows and how much time is needed from internal teams?
<p>The Board Marketing team will review all content and timing varies depending on the type of content.</p>			
31.	ITN 1.01	Pg. 1-3	<p>Are the following Marketing Cloud reporting and analytic dashboards expected to be built and maintained by the Contractor, or the Board? Please answer individually if there is variation in role.</p> <p>Journey performance Email KPIs Conversion attribution Subscriber health A/B testing results</p>
<p>The Board would expect a collaborative effort between the Marketing vendor and our Salesforce and Salesforce Marketing Cloud vendors/partners.</p>			
32.	ITN 1.01	Pg. 1-3	Will Salesforce Marketing Cloud analytics be integrated into overall campaign dashboards, or reported separately?
<p>Marketing Cloud analytics will be reported separately.</p>			
33.	ITN 1.01	Pg. 1-3	ITN   1.01   Pg. 1-3: What is the required reporting cadence for CRM/journey performance?
<p>Quarterly reporting is anticipated at this time.</p>			
34.	ITN 1.01	Pg. 3	Does the Board currently pay for an internal reporting dashboard for all metrics outside of the fees outlined in the ITN? If so, what is that current cost?
<p>The Board has a variety of reporting dashboards that were created on a project basis (not in retainer).</p>			
35.	ITN 1.01	Pg. 3	What CMS powers the three program websites? (WordPress, Drupal, custom CMS?)
<p>Florida Prepaid and the Foundation are built in WordPress, and the new ABLE United website is built in Webflow.</p>			
36.	ITN 1.01	Pg. 3	<p>What percentage of Foundation marketing work is expected to be: donor outreach, awareness campaigns, event support, collateral development?</p>
<p>The percentage cannot be provided at this time, as the Foundation scope for the coming year will be determined through strategic creative exercises with our partners.</p>			

37.	ITN 1.01	Pg. 3	Multi-organization coordination can be complex and requires defined roles of accountability. Expectations around shared vs. separate workstreams are unclear. Can you provide an overview of the ideal scenario?
The Board has clear and defined roles for the Marketing vendor(s). The vendor(s) are expected to work collaboratively to bring the best results for the programs.			
38.	ITN 1.01	Pg. 1	What does the Board perceive as the "primary competition" to the prepaid plan and 529 investment product? I.e. which alternative savings options do you consider most relevant when shaping marketing strategy (e.g., private savings accounts, financial advisors, private lenders, or other 529 providers)?
The Board sees private savings accounts, other 529 providers, and financial advisors as examples of competition for Florida 529 Plans.			
39.	ITN 2.01	Pg. 5	Will there be an opportunity to present the agency response and recommendations to the Board within the Negotiation Period section of the ITN Schedule? Or will the Board be making its decision strictly on the written response to the ITN?
Agencies that move forward to the shortlist may have the opportunity to present their response and recommendations to the negotiation team during the Negotiation Period. This would allow for further discussion, clarification, and potentially adjustments before final decisions are made. However, this opportunity is not guaranteed for all respondents and is based on the outcome of the initial evaluation.			
40.	ITN 2.01	Pg. 5	Would the Board consider moving back the ITN deadline to account for holiday office closures?
The Board recently modified the ITN deadline due to the quantity of questions received. Currently, the Board does not anticipate additional modifications to the deadline, but reserves the right to do so.			
41.	ITN 3.01	Pg. 6	The retainer table on page 6 lists nearly all strategic and executional functions as "Retainer" for Prepaid and ABLE. Can the Board provide an attachment of all annual deliverables and assets for the current or past year plan? Or can the Board provide anticipated monthly volume expectations for: Creative deliverables (per channel) Email campaigns Primary Organic Social posts Primary Paid Social posts Primary Organic Social Media Channels Website updates Reporting dashboards Landing pages or UX adjustments

## Work Volume Overview

- **Email:** Volumes vary by strategy. Over the past year, Florida Prepaid produced ~50–70 emails, ABLE United ~10–20 emails. Foundation needs will be defined in the future.
- **Social Media:** Florida Prepaid and ABLE United each average ~12–15 organic posts per month; the Foundation typically posts ~2–5 times per month.
- **Creative Campaigns:**
  - Florida Prepaid typically runs 3–5 major campaigns annually, each generating hundreds of digital assets, multiple videos, collateral, and direct mail.
  - ABLE United runs 1–2 campaigns annually with a more moderate volume of digital assets, videos, and collateral.
  - Foundation campaign scope will be determined through upcoming strategic planning.
- **Website & UX:** Updates and enhancements are typically completed quarterly but may shift based on strategic priorities.

42.	ITN 3.01	Pg. 6	Media buying governance is not fully described in scope: We would like clarity around performance reporting cadence, what are reconciliation rules and reporting requirements, and transparency standards?
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The Contractor will be responsible for providing quarterly performance reports with actionable recommendations and insights.

Detailed reconciliation and billing requirements will be communicated with the selected vendor.

43.	ITN 3.01	Pg. 6	Is there a maximum expected level of effort per month for retainer work, or will volume of deliverables and services be mutually defined during contract negotiations?
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The volume of deliverables and services is expected to be mutually defined during contract negotiations. This allows for flexibility based on the evolving needs of the Board and the specific requirements of each program over the course of the contract.

44.	ITN 3.01	Pg. 6	Will the partner be responsible for managing a centralized creative content library across all three programs?
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Yes, the Marketing firm will be responsible for managing creative content and assets for all 3 brands.

45.	ITN 3.01	Pg. 6	What is the expected level of ongoing UX support in the retainer—Can the Board provide general deliverables or volume of tasks across minor optimizations and or substantial redesigns?
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The retainer includes ongoing UX support including website maintenance and security, promotional updates, mobile responsiveness, and ADA compliance. Major redesigns or substantial updates are billed separately as project-based services.

46.	ITN 3.01	Pg. 6	We work with many different industries and verticals that all require different levels of ADA compliance. Can you please define whether level A, AA, AAA of ADA compliance is used for each of your web and content properties?
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Florida Prepaid follows WCAG AA 2.0 guidelines, and implements 2.1 - 2.3+ where applicable.			
47.	ITN 3.01	Pg. 7	For each program (Prepaid/Investment, ABLE United, Foundation), how many campaigns per year should the Respondent assume? Please define campaign architecture (Appendix D helped to shed some light, but did not clearly provide direction/input for all).
<p><b>Prepaid/Investment:</b> typically have 3 major campaigns each year, with each lasting 2-3 months, as well as year round prospecting campaigns.</p> <p><b>ABLE United:</b> typically has 1-2 major campaigns lasting 2-3 months, as well as year round prospecting campaigns.</p> <p><b>Foundation:</b> to be determined</p> <p>The Marketing vendor will be responsible for creating the media plan to meet the goals.</p>			
48.	ITN 3.01	Pg. 7	Creative and Content Development States that we are to create and maintain, and adhere to comprehensive brand guidelines for all programs. Can the Board share them for evaluation before submission of the response?
The Board will share brand guidelines with the selected vendor(s).			
49.	ITN 3.01	Pg. 7	The ITN states the desire for AI efficiency. In regard to the primary campaign creative and high quality assets, does the Board prioritize efficiency (AI-generated creative) or original creative with traditional production? Or a mix?
<p>For primary campaign creative, the Board is open to a mix of AI-generated content for efficiency, alongside original creative produced through traditional methods to maintain high quality and brand consistency.</p>			
50.	ITN 3.01	Pg. 7	In order to develop and manage analytics, it's important to understand if the selected Contractor will receive direct access to publishers for advertising (Meta, Google, DSPs), or must accounts remain under Board ownership?
The contractor will execute all paid media buys and manage analytics. All buys will be made directly by the vendor. Social Media accounts (e.g. Meta) will remain under Board ownership, with the vendor managing the channels.			
51.	ITN 3.01	Pg. 7	Does the Board expect monthly blog content per website (Prepaid, ABLE, Foundation), and at what volume per month? ITN only says to create blog content and content calendar. (Appendix D lightly touches on it, but not enough detail)
The Board expects regular blog content across the websites (Prepaid, ABLE, Foundation), but the frequency (e.g., weekly or monthly) would be clarified during the negotiation phase. A reasonable assumption would be 1-2 blog posts per month per site, but this can vary depending on the program's needs and goals.			

52.	ITN 3.01	Pg. 7	Can you clarify the expected level of detail for the annual and quarterly digital/media plans? I.e. is this a channel mix and flighting flowchart?
A comprehensive annual media strategy plan will be presented to the Board, and quarterly channel mix and flighting flowcharts should be provided.			
53.	ITN 3.01	Pg. 7	Reporting cadence is mentioned twice: Monthly and Quarterly. Can you please provide the required goals and components needed for each of the reports?
This will be determined as part of negotiations and onboarding.			
54.	ITN 3.01	Pg. 7	Are we required to run on specific channels or with specific partners? And do we need to avoid specific content?
The vendor will create a detailed media plan including the best strategy to meet the goals outlined for the year.			
55.	ITN 3.01	Pg. 7	Are there Salesforce Marketing Cloud audience segments that the media team will need to integrate with?
The vendor can utilize Advertising Audiences within Marketing Cloud for social media targeting efforts.			
56.	ITN 3.01	Pg. 7	What level of access will the agency have to GA4, website dashboards, or BI tools?
The vendor will have access to necessary tools including GA4, Wordpress and Webflow, and Marketing Cloud.			
57.	ITN 3.01	Pg. 8	What is the expected cadence for organic social media posting per channel?
The vendor should propose the recommended cadence per channel.			
58.	ITN 3.01	Pg. 8	Does the Board require real-time community management, or will responses during business hours suffice? Is community management responding to a handful of top comments and engagements or all comments? If all, please provide an outline of volume to expect by channel and program?
The Board requires regularly scheduled and agreed upon community management during business hours, and after hours and weekends for designated efforts (that will be communicated as needed). Community management responds to most comments. Volume varies by promotional campaign and other outreach efforts.			
59.	ITN 3.01	Pg. 8	Does the Board maintain existing relationships with any influencers or creators?
The Board does not have any direct relationships with influencers / creators. The vendor will create an influencer strategy in collaboration with the Board.			

60.	ITN 3.01	Pg. 8	Does the Board expect a defined annual volume of email templates, triggered messages, or journey updates? If so, what is the expected volume?
Email strategy will vary by year based on larger goals and overall Marketing strategies. Generally, Florida Prepaid creates 50-70 emails each year, and ABLE United creates 10-15 emails each year. The Foundation needs are to be determined.			
61.	ITN 3.01	Pg. 8	How many influencers does each program partner with on an annual basis?
Influencer strategy will vary by year based on larger goals and overall Marketing strategies. Generally, Florida Prepaid typically works with 10-15 each year, and ABLE United works with 2-5.			
62.	ITN 3.01	Pg. 8	As the Contractor is being asked to manage audience segmentation, lifecycle messaging, can you confirm/clarify - can the current segmentation be further defined (life stage, demographic, psychographic, financial)?
Our primary audiences include savvy investors with children ages 0-4, uncertain savers with children ages 0-9, and late starters with children ages 10-16. Key milestones in child development represent important touchpoints for reaching Florida families - including birth, pre-school, kindergarten, etc.			
63.	ITN 3.01	Pg. 8	Project Based Services, asks about administration within Salesforce Marketing Cloud CRM integration. Can you specify if you have in-house resources that manage any part of the Salesforce integration and day-to-day operations?
Currently, Salesforce and Salesforce Marketing Cloud vendors/partners develop and QA the journey builds, segments and data extensions in Marketing Cloud.			
64.	ITN 3.01	Pg. 10	Project-based services: Are translations expected for ABLE, Foundation, and Prepaid marketing? If so, what languages? And what percentage of creative assets need to be translated?
With diverse audiences and programs, translations are needed for select marketing resources, including digital / printed collateral and product videos. Translated materials are generally available in both Spanish and Haitian Creole. This need may vary based on future goals and strategies.			
65.	ITN 3.01	Pg. 14	For Appendix B, Tab 4 scoring - are B2C and B2B work examples scored equally, or is there a heavier weighted score for B2C?
The work examples in Tab 4 provide insight into each Respondent's work experience (B2C, B2B, or both). Each Evaluator may award up to 400 points based on the demonstrated work experience and applicability for the Response component under consideration.			
66.	ITN 3.01	Pg. 14	If a respondent is only submitting proposed services for Advertising and Creative Services, Digital Marketing and Social Media Services (i.e., Not Public Relations), how will this impact the response scoring (since Public Relations work examples in Tab 4, Appendix B, would not be populated nor would pricing for PR)?

Each Response component for which the Respondent meets the minimum qualifications and satisfies the mandatory requirements will be evaluated independently. Scoring for the Advertising and Creative Service section is not impacted by responding (or not responding) to Public Relations and vice versa.

67.	Appendix D	Resource s (slide 7)	What is the health of your current contact database (list size, growth rate, open & click rates, bouncebacks, unsubscribes, complaints, etc.)? If you can't share specific metrics, can you identify which of these areas most need improvement?
Our lead and contact databases are actively managed and in stable overall health. We monitor engagement (open and click rates), deliverability (bounce rates), and compliance indicators (unsubscribes and spam complaints) on an ongoing basis to inform content optimization.			
68.	Appendix D	Resource s (slide 7)	How are email and nurture campaigns currently being tested and optimized? Is there a test-and-learn component built into the ongoing programs?
Email nurture campaigns are tested and optimized through an ongoing, structured test-and-learn approach. Performance is regularly evaluated using standard engagement and conversion metrics to inform continuous improvement.			
69.	Appendix D	Resource s (slide 7)	Are the email and landing page templates static, or are they leveraging dynamic content/imagery?
The Board utilizes both static and dynamic content in our emails. This may evolve over time as we continue to build out new communications.			
70.	Appendix D	Resource s (slide 25)	What efforts have been tested and/or launched to grow the database (both offline and online contact capture/opt-ins)?
The Board currently uses a variety of lead generation tactics, including scholarship programs, paid social campaigns and event lead generation.			
71.	Appendix D	Resource s (slide 30)	Is video content being integrated into email/nurture campaigns?
The Board uses a variety of images, gifs, and links to videos in email campaigns.			
72.	Appendix D	Resource s (slide 31)	Are Salesforce subscription costs included in the email marketing budget line item? What else is included in this budget?
Salesforce and Marketing Cloud costs are NOT part of the Marketing budget.			
The email budget includes additional time/labor above and beyond standard campaign emails, to include email strategy, copywriting, customer journey email creation, QA using Litmus, etc.			

73.	Appendix D	Resources (no specific slide)	How is direct mail being integrated with email communications? Are these distinct workstreams, or are there combined flows leveraging a sequence of both channels?
Direct mail efforts are primarily focused on reaching families with newborns and infants, and once the family has opted in, they are included in email communications.			
74.	Appendix D	Pg 11	<p>Can you confirm all the primary organic AND paid social channels for each program? (Found these on Appendix D) Please provide any missing?</p> <p><b>FPCB:</b>  <b>Organic:</b> <a href="#">Facebook</a>, <a href="#">Instagram</a>, <a href="#">LinkedIn</a>  <b>Paid:</b> Facebook, Instagram, Pinterest</p> <p><b>ABLE:</b>  <b>Organic:</b> <a href="#">Facebook</a>, <a href="#">Instagram</a>, <a href="#">LinkedIn</a>  <b>Paid:</b> Facebook, Instagram</p>
The Board utilizes the following social media channels:			
<p>FPCB:  Organic: Facebook, Instagram, LinkedIn, YouTube  Paid: Facebook, Instagram, Pinterest, Reddit, YouTube</p> <p>ABLE:  Organic: Facebook, Instagram, LinkedIn, YouTube  Paid: Facebook, Instagram, Reddit, YouTube</p> <p>Foundation:  Organic: LinkedIn</p>			
75.	Appendix D	Multiple pages 27, 3 & 32	The Board shared historical budget allocations by function (media, creative, web, social, analytics). Does the Board expect the partner to propose strategic budget allocations across channels for review within this ITN Response? If so, where within Appendix B should this be provided?
No, the Board does not require a proposed budget allocation in the ITN response.			
76.	Appendix D	Prepaid Pg 14, ABLE Pg 21	What is the current agency/professional services fee for 529 Investment support? (we have for FPP and ABLE per appendix D)
Professional fees for Florida Prepaid College Savings Plans is inclusive of both Prepaid Plans and Investment Plans.			
77.	Appendix D	Prepaid Pg 14, ABLE Pg 21	Appendix D   Appendix: contains very high-level segmentation. Can you provide any itemized or further defined audience or segmentation information?

The Board welcomes proposals from respondents that discuss how further defined audience/segmentation strategies could be utilized to meet the objectives of this ITN.

78.	Appendix D	Pg 19	What are the current awareness levels overall, and for each product? And what are the annual sales goals?
Florida Prepaid College Savings Plans brand awareness was 70% when surveyed during the 2024/2025 fiscal year.			
ABLE United brand awareness was 42% aided; 2% unaided when surveyed during the 2024/2025 fiscal year.			
79.	Appendix D	Pg 29	Do you have established KPI benchmarks for each channel that can be provided for strategic review and recommendation?
See the Marketing Plans in Appendix D for available details.			
80.	Appendix D	Pg 14 & 19	Can you give more details on the current partnerships in place? Specifically, buying details on any required partnerships, new partnerships and required support assets.
Partnerships are evaluated periodically (at least annually) and will vary based on current strategy. The Board continues to prioritize opportunities to integrate into key milestones for Florida families, e.g. birth, preschool, kindergarten, etc.			
81.	Appendix D	Pg 29	Can you provide previous media plans with more detail, (including flowcharts & Buy details)?
See the Marketing Plans in Appendix D for available details.			
82.	Appendix D	Slide 21	The promos/media plans show a seasonality with a focus on Fall and Spring promo expansions. Are these still primary time periods moving forward?
The vendor will propose a media plan to best reach Florida families.			
83.	Appendix D	Slide 21	Can you clarify whether the total budget and distribution between the always-on line items is driven by audience scale limitations or by strategic goals?
The budget is driven by strategic goals.			
84.	Appendix D	Pg 29	CY26 Marketing Plan shows a heavier allocation toward Annual Prospecting with a smaller share dedicated to Annual Conversion. It also looks like these always-on tactics were flighted to fill the gaps where there isn't a promotional message. Would you be open to reallocating the budget between always-on campaigns and promotions?
The vendor will propose a media plan to best reach Florida families.			

85.	Appendix D	ABLE FY 25_26 Exec Summary Marketing Plan Slide 4	To better understand the performance trends, how did the media spend shift during the timeframes 2017-2019 & 2020-2025?
Media spend varies year to year based on proposed strategy, macro/microeconomic factors, mutually agreed goals, new features/products, etc.			
86.	Appendix D	ABLE FY 25_26 Exec Summary Marketing Plan Slide 16	APPENDIX D   Would you be open to streamlining the partners with the provided budget?
The Board is open to budget optimization strategies.			
87.	Appendix D	ABLE FY 25_26 Exec Summary Marketing Plan Slide 16	Can you provide historical media campaign reporting for the current marketing plan, including the new activations?
Please refer to the appendix for available information. The Board welcomes proposals from respondents to meet the objectives of this ITN.			

## St. John

Question	ITN Section	ITN Page	Question/Comment
1.	1.01	2	<p>Specific to the Foundation's evolution, we understand both Prepaid and Investment plans will be promoted as scholarship options. Can you elaborate on how these products will be structured, specifically:</p> <ul style="list-style-type: none"> <li>• The Foundation site currently lists a variety of program options (i.e. Path to Prosperity, Project Stars, etc.), plus a private option. Specific to the evolution, will existing options remain intact with the expansion focused on the private option? Or, will there be consolidation?</li> <li>• Will all of the private scholarships continue to be custom or does the Foundation plan to offer predetermined scholarship amounts or packages as "products"?</li> <li>• Is there a minimum allowable and/or preferred amount for Investment plan Foundation scholarships?</li> </ul> <p>As Foundation scholarship products, both Prepaid and Investment, will be marketed to a broader range of donors (civic clubs, PTA, nonprofits, etc.) will both Prepaid and Investment plans be eligible for the dollar-for-dollar match? If there are minimum qualifications/requirements for dollar-for-dollar matching, what are they?</p>
The Foundation strategies are currently under review and will continue to be refined in collaboration with our Marketing vendor(s). The Board welcomes proposals from respondents to meet the objectives of this ITN.			
2.	1.01	1	<p>In addition to what is referenced in the ITN, are there brand awareness and/or product comprehension KPIs to be considered? This may be best answered specific to Prepaid, Investment, ABLE United and the Foundation.</p>
Additional KPIs may be considered as part of the upcoming Marketing Planning cycle. The Board welcomes proposals from respondents to meet the objectives of this ITN.			
3.	Appendix B	4	<p>In the Written Response Packet, Tab 3, Question 2, you ask to "introduce the key personnel that would be assigned to the Board account." Are you looking for discipline leads only or would you like to understand the full staffing plan required to fulfill the scope outlined in ITN Section 3, Description of Services?</p>
The Board welcomes proposals from respondents that help demonstrate the breadth and depth of the respondent for meeting the Board's objectives and introducing the key personnel, including discipline leads, that support the proposed staffing plan.			