

INVITATION TO NEGOTIATE

Advertising / Digital Marketing, and Public Relations Services for the Florida Prepaid College Board, the Stanley G. Tate Florida Prepaid College Foundation, and ABLE United

Florida Prepaid College Board

The components of this ITN are: (1) Advertising and Creative Services, Digital Marketing, and Social Media Services; and (2) Public Relations, Partnerships, and Events. Respondents may choose to address one or both of these components in response. The Board intends to award up to one contract per component, for a maximum of two contracts from this ITN.

Issue Date	September 19, 2019
Written Request for Clarification Deadline	October 1, 2019 12:00PM (ET)
Written Request for Clarification Response	October 9, 2019
Response Deadline	November 1, 2019 12:00 PM (ET)
Anticipated Contract Effective Date	April 2020

ITN 19-04

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1. INTRODUCTION

1.01 ABOUT THE FLORIDA PREPAID COLLEGE BOARD

The Florida Prepaid College Board (Board) administers two Qualified Tuition Programs for the State of Florida pursuant to Section 529 of the Internal Revenue Code: the Stanley G. Tate Florida Prepaid College (Prepaid) Program and the Florida 529 Savings (Savings) Program. The Prepaid Program allows Florida families to prepay the cost of college tuition, required fees, and dormitory housing at a state college or university in Florida at a price lower than the projected future cost of enrollment. The Savings Program allows Florida families to invest for future higher education expenses.

The Board, an agency of the State of Florida created by Section 1009.97, Florida Statutes, has seven members who establish policy and monitor performance for the Prepaid and Savings Programs. The Board is administratively housed within the State Board of Administration (SBA) but exercises its powers independently. The Board employs an administrative staff of 20.

The Board is supported by the Stanley G. Tate Florida Prepaid College Foundation (Foundation) and Florida ABLE, Inc. (d/b/a ABLE United), two direct-support organizations that administer college scholarship programs and a tax-free savings and investment program for individuals with a disability, respectively.

For more information about the Board, please visit myfloridaprepaid.com.

1.02 PROCUREMENT OBJECTIVE

This Invitation to Negotiate (ITN) has been issued by the Board, pursuant to Section 287.057, Florida Statutes, to obtain written offers for services (Responses) from qualified firms (Respondents) to provide advertising, marketing, and public relations services for the Board, the Prepaid Program, the Savings Program, the Foundation, and ABLE United.

1.03 MINIMUM QUALIFICATIONS FOR RESPONDENTS

Respondents must affirmatively state, in writing, that as of June 30, 2019, the Respondent has:

1. The following minimum years of experience providing the applicable Communication Services, for the component(s) that the Respondent is addressing:
 - Advertising and Creative Services: 5 years
 - Digital and Social Media Services: 5 years
 - Public Relations, Partnerships, and Events: 5 years
2. The following minimum annual billings providing the following services, for the component(s) that the Respondent is addressing:
 - Advertising and Creative Services: \$5,000,000
 - Digital and Social Media Services: \$1,500,000
 - Public Relations, Partnerships, and Events: \$750,000
3. The Respondent maintains a permanent and active place of business in the state of Florida.

Any Respondent that does not satisfy the minimum criteria herein shall be rejected.

While not explicitly required, the Board would strongly prefer the Respondent has a fully staffed office within 300 miles of Tallahassee, Florida, and has experience with the financial industry.

2. SCHEDULE AND COMMUNICATIONS

2.01 SCHEDULE

The following schedule is set forth for informational and planning purposes. The Board reserves the right to modify this schedule as necessary to effectively administer this procurement.

Action	Date & Time	Location
Issue Date	September 19, 2019	
Written Request for Clarification Deadline	October 1, 2019 12:00PM (ET)	ITNinfo.Prepaid@MyFloridaPrepaid.com
Written Request for Clarification Response	October 9, 2019	
Response Deadline	November 1, 2019 12:00PM (ET)	1801 Hermitage Blvd., Suite 210 Tallahassee, FL 32308
Response Opening*	November 1, 2019 2:00PM (ET)	1801 Hermitage Blvd., Suite 210 Tallahassee, FL 32308
Evaluator Scoring Validation*	December 2019	1801 Hermitage Blvd., Suite 210 Tallahassee, FL 32308
Negotiation Period	January – February 2020	
Negotiation Vote*	February 2020	1801 Hermitage Blvd., Suite 210 Tallahassee, FL 32308
Notice of Intended Award	February 2020	
Anticipated Contract Effective Date	April 2020	

* Indicates public meeting. Notice of public meetings will be posted in the Florida Administrative Register (FAR).

2.02 OFFICIAL NOTICES

All notices, addenda, revisions, decisions, intended decisions, and other information relating to this procurement will be electronically posted on the State of Florida Vendor Bid System (VBS) website. The Respondent is responsible for monitoring VBS. The Board does not guarantee information obtained from other sources.

Please visit: myflorida.com/apps/vbs/vbs_main_menu.

Agency: **State Board of Administration**

Title: **ITN 19-04**

2.03 COMMUNICATIONS AND RESTRICTIONS THEREOF

In accordance with Section 287.057, Florida Statutes, Respondents to this solicitation or persons acting on their behalf may not contact, between the release of the solicitation and the end of the 72-hour period following the agency posting the Notice of Intended Award, excluding Saturdays, Sundays, and state holidays, any employee or officer of the executive or legislative branch concerning any aspect of this solicitation, except in writing to the procurement officer or as provided in the solicitation documents. Violation of this provision may be grounds for rejecting a Response. The procurement officer for this procurement is:

Rebecca Livingston, ITN Administrator

Email: ITNinfo.Prepaid@MyFloridaPrepaid.com

The Board is the only entity authorized to issue news releases relating to this procurement and any resulting contract.

3. DESCRIPTION OF SERVICES

3.01 SERVICES

The components of this ITN include: (1) Advertising and Creative Services, Digital Marketing, and Social Media Services, and (2) Public Relations, Partnerships, and Events. The components are referred to collectively in this document as "Communication Services". The Board's current contract for services expires on June 30, 2020.

The Respondent(s) selected will perform the services of one or both of the component areas below. When bidding on a component, a Respondent is bidding on all services listed within that component. As outlined in Section 1.02, services are to be provided for the Board, the Prepaid Program, the Savings Program, the Foundation, and ABLE United unless indicated otherwise. Services will be mutually agreed upon by the Board and Respondent(s), pursuant to this negotiation process and formally documented in Exhibit A of the resulting contract(s) attached herein as Appendix A.

For more information about the Prepaid and Savings Programs, please see Appendices D-H. For more information about the Foundation, please visit: www.floridaprepaidcollegefoundation.com/ and see Appendix I. For more information about ABLE United, please see www.ableunited.com/ and Appendices J-M.

ADVERTISING AND CREATIVE, DIGITAL MARKETING, AND SOCIAL MEDIA SERVICES

The following Services are to be included in the retainer figure(s) requested in Appendix B: Written Response Packet, Tab 6: Pricing Schedule. These retainer services are minimum expected performance requirements, which are not impacted by changes to or within the Communication Services budget, pursuant to the annual approved Marketing Plans (see Appendices G and M for reference).

1. Develop and implement an annual comprehensive strategic Advertising and Creative Services Plan (PAID), and Digital Marketing and Social Media Plan (OWNED).
 - Plan must be consistent with the Board's strategy and objectives to support all aspects of Board Communication Services.
 - Plan must include goals, objectives, strategy, and proposed budget.
 - Plan must be supported by appropriate research, including state of Florida demographic data. Such analysis shall not be considered specialty research.
 - Plan must present at least three creative concepts.
2. Account management and coordination: oversight and leadership of all marketing channel activity.
 - Includes preparation of monthly report billing, including a categorized report of billings relative to the budget.
 - Includes attendance at quarterly Board meetings.
3. Account Planning: Includes the planning and development of key brand messaging (owned/earned/paid channels), target audiences/personas, content strategy and creative strategy.
4. Project Management: Includes project manager for traditional and digital media that oversees the multi-department integration and timing for all projects.
5. Collaboration and support with any and all Communication Services vendors and any other vendors contracted by and/or associated with the Board.

6. Manage, monitor, and measure results using analytics and performance metrics that reflect conversion rates, cost per conversion and return on investment through real-time, short-term and long-term time periods for each strategy and tool.
7. Create, update, and maintain a brand guidelines manual.
8. Analyze and interpret existing market research, monitor industry trends, and offer innovative strategies.
9. Develop and produce creative executions for all media advertising, including all creative advertising concepts, script/copy writing, and graphic design.
10. Media strategy, planning, placement, and reporting of all television, radio, print, out-of-home, digital, social, and other channels.
 - Obtain value-added opportunities for the Board associated with the placement of such advertising.
11. Create and produce digital and print versions (not including print costs) of all collateral and other advertising, marketing and customer support materials including, but not limited to, Master Contract, Program Description and Participation Agreement, brochures, flyers, posters, CDs, DVDs, direct mail, and other similar materials.
12. Create and produce promotional items and manage the storage and distribution of such items.
13. Design, develop, and execute all routine web-based and digital marketing resources, including, but not limited to, web applications, digital media planning/placement, search engine optimization, search engine marketing, and digital banner ads.
14. Create, produce, and coordinate content for the Florida Prepaid website, the Foundation website, and the ABLE United website.
15. Create, produce, and coordinate content for all email marketing, including creation of annual email strategy and calendar, and management of email marketing platform (MailChimp or other approved platform), per approved Marketing Plans.
 - Includes creative and digital support of all customer email communications (quarterly newsletters, prospect and incomplete application emails, etc.).
16. Design, develop, and execute all aspects of social media, including but not limited to organic social media strategy, content development, implementation, monitoring, and engagement.
17. Leverage digital assets and technologies to maximize reach and frequency across all digital platforms.
18. Proofreading: Includes proofreader to review all original copy and revisions for all project work, including but not limited to, collateral, emails, digital banners, promotional items, website, etc.

The following Services are not included in the retainer figure(s) requested in Appendix B: Written Response Packet, Tab 6: Pricing Schedule, and will be billed on a project basis.

1. Additional digital / website work for specific projects, including new product website enhancements and modifications, as directed by the Board.
2. Specialty research support (studies, surveys, whitepapers, focus group oversight, field research, etc.).
 - For example, development of research instruments/proposals, recruiting, programming, management of outside vendor(s), analysis and reporting, etc.

3. Hispanic communications, including but not limited to, procuring language translation services for any assets produced.
4. Conduct market research to assess the image, perception, and knowledge of the Board and Board products as necessary and to assess the effectiveness of strategies.
5. Video and photography production, and social media content production (videos/GIFs/original content), as approved in the Marketing Plan.
6. Production costs for all media advertisements, including television, radio, print, out-of-home, digital, social and other channels.
7. Printing and postage.
8. Promotional item cost and shipping.
9. Hard costs for email platform vendor license.

PUBLIC RELATIONS, PARTNERSHIPS, AND EVENTS

The following Services are to be included in the retainer figure(s) requested in Appendix B: Written Response Packet, Tab 6: Pricing Schedule. These retainer services are minimum expected performance requirements, which are not impacted by changes to or within the Communication Services budget, pursuant to the annual approved Marketing Plans (see Appendices G and M for reference).

1. Develop and implement an annual comprehensive strategic Media/Public Relations, Partnerships, and Events Plan (EARNED).
 - Plan must be consistent with the Board's strategy and objectives to support all aspects of Board Communication Services.
 - Plan must include goals, objectives, strategy, and proposed budget.
 - Plan must be supported by appropriate research, including state of Florida demographic data. Such analysis shall not be considered specialty research.
2. Account management and coordination.
3. Collaboration and support with any and all Communication Services vendors and any other vendors contracted by and/or associated with the Board.
4. Manage, monitor, and measure results using analytics and performance metrics that reflect conversion rates, cost per conversion and return on investment through real-time, short-term and long-term time periods for each strategy and tool.
5. Analyze and interpret existing market research, monitor industry trends, and offer innovative strategies.
6. Monitor and report all media coverage, including, but not limited to, providing the Board with a daily report, a weekly summary, as well as a quarterly analysis of all media coverage related to the Board, other states' 529 plans, and related industry news.
7. Provide media training and produce talking points, press releases, media advisories, FAQs, and other media services.
8. Develop and participate in promotions, special events, community events, webinars, and marketing alliances to support all Communication Services and audiences.

9. Content development, including Annual Report and Legislative Pocket Guide.
10. Graphic design to support partnerships, brand ambassadors, and event activation.
11. Identify and coordinate new strategic alliances, partnerships and co-branding opportunities to partner with public and private entities to add value to the Board and identify enrollment opportunities for all programs.
12. Engage advocacy and professional (legal, financial, etc.) organizations to promote Board programs through their communication channels and Board-owned channels.

The following Services are not included in the retainer figure(s) requested in Appendix B: Written Response Packet, Tab 6: Pricing Schedule, and will be billed on a project basis.

1. Hispanic communications, including but not limited to, procuring language translation services for any assets produced.
2. Conduct market research to assess the image, perception, and knowledge of the Board and Board products as necessary and to assess the effectiveness of strategies.
3. Printing and shipping.

3.02 CONTRACT

The Board intends to enter into a written contract with the Respondent(s) that offers the best value to the Board for the services included in this solicitation, as determined by the Board. The contract will incorporate this solicitation and amendments thereof, the written requests for clarifications and the answers thereof, and the Response provided by the contracting Respondent, including any and all supplemental Responses as requested by the Board.

A copy of the contract, which details the responsibilities of the contracting Respondent(s), is provided as Appendix A. The Board reserves the right to modify this contract pursuant to the negotiations addressed herein.

If the language between this solicitation and the contract conflict with the terms of State of Florida General Contract Conditions ([PUR 1000](#)) or State of Florida General Instructions to Respondents ([PUR 1001](#)), incorporated herein by reference, this solicitation and the contract shall control.

Failure to meet any contractual obligations may result in cancellation of any award.

4. RESPONSE

4.01 MANDATORY REQUIREMENTS

The Board has established certain mandatory requirements that must be included in a Response. The use of "shall", "must", or "will" (except to indicate simple futurity) indicates a mandatory requirement or condition. The words "should" or "may" indicate desirable attributes or conditions, but are permissive in nature. Deviation from, or omission of, such a desirable attribute will not by itself cause rejection of a Response.

Respondents who meet the minimum qualifications and that have satisfied the mandatory requirements will be considered; any Respondent who does not will be rejected.

4.02 RESPONSE FORMAT AND CONTENT

Respondents must provide the following information in the form/format specified. Failure to comply with the instructions herein is sufficient cause to reject a Response.

The Written Response Packet is included herein as Appendix B and includes the following forms:

Tab 1 – Invitation to Negotiate Acknowledgement

The Invitation to Negotiate Acknowledgment must be completed and signed by an officer or agent of the Respondent who is empowered to bind the Respondent in a contract. An executed acknowledgement, with the requested materials that follow, constitute an offer from the Respondent to provide the services detailed in this solicitation under the contractual terms provided herein.

Tab 2 – Minimum Qualifications

The Minimum Qualifications form represents a written attestation that the Respondent meets the minimum qualifications set forth in this solicitation.

Tab 3 – Organizational Experience

The Organizational Experience form collects information about the Respondent, the assigned team, and the relevant experience thereof.

Tab 4 – Work Examples

The Work Examples form has multiple sections: (1) Advertising and Creative, Digital Marketing, and Social Media Services, and (2) Public Relations, Partnerships, and Events. Please see Appendix B for specific instructions.

TAB 5 - Audits and Financial Information

The Audits and Financial Information form requests recent financial statements and third-party audit reports. The Respondent is asked to document sufficient financial history, financial strength, capital adequacy, and internal controls to provide the services required in this procurement.

TAB 6 – Pricing Schedule

The Pricing Schedule represents the price offered for the services set forth in this solicitation. The Respondent, if awarded the contract, will receive compensation under the contract resulting from this procurement based upon the agreed upon price contained in the Pricing Schedule.

The forms provided herein are made available in Microsoft Word on the Board's website for ease of completion.

Please visit: myfloridaprepaid.com/who-we-are/about-the-board/board-reports-and-plans/.

4.03 DELIVERY

A Respondent, including any Related Entities, may submit only one Response, regardless of addressing one or both components. Submission of more than one Response by a Respondent, or by the Respondent and a Related Entity, shall cause the rejection of all Responses submitted by the Respondent and the Related Entity. For this purpose, "Related Entity" means any corporation, partnership, limited partnership, limited liability company, or other entity, including, but not limited to, any parent company, subsidiary company, predecessor company, successor company or any member of an affiliated group of corporations, as defined in Section 1504 of the Internal Revenue Code.

Responses must be complete on the date delivered. Additional information submitted after the Response, or separate from the Response, will not be considered unless specifically requested by the Board and only to the extent requested.

The Respondent is responsible for the timely and proper delivery. Responses that, for any reason, are not delivered timely will be retained by the Board but will not be considered.

Delivery to the Board

Each Response shall be prepared simply and economically providing a straightforward and concise delineation of the Respondent's capabilities to satisfy the requirements of this procurement.

Each Respondent shall deliver the following:

1. Four (4) complete electronic copies of the Response on four (4) USB hard drives – one (1) copy per drive.
2. One (1) unbound original copy of the Response.
3. Four (4) bound copies of the Response. Fancy bindings and promotional material are not desired.

All Responses must be executed and submitted in a sealed package. The face of the package must contain the number and title of this solicitation and the date of the Response. See Section 2 for delivery date, time, and address.

Responses received by facsimile, telephone, or email will be rejected.

4.04 CONFLICTS OF INTEREST

Any award hereunder will be subject to the provisions of Chapter 112, Florida Statutes. Respondents must disclose with their Response the name of any officer, director, or agent who is also an employee of the State of Florida, the Board, or any agency of the State of Florida. Respondents must disclose the name of any state employee who owns, directly or indirectly, interest of five percent or more in the Respondent. Respondents must disclose all investment products, annuities, mutual funds or other similar type savings plans that are marketed or sold by the Respondent, its proposed subcontractors or any Related Entity of the Respondent or any subcontractor, for other states as a part of a prepaid college fund, college savings fund, ABLE program, or for any Qualified Tuition Program.

4.05 RESPONSE TENURE

All Responses are valid for one hundred eighty (180) days from the due date. The period of time during which Responses are valid will be tolled during the pendency of any proceeding related to any contract awarded pursuant to this procurement.

5. ITN PROCESS

5.01 OVERVIEW

This is a multi-phase competitive procurement process, pursuant to Section 287.057, Florida Statutes, whereby all Respondents shall receive fair and equal treatment. Respondents will not be eliminated from consideration until the posting of the Notice of Intended Award.

5.02 REQUESTS FOR CLARIFICATION

Prior to the Written Request for Clarification deadline, the Board will accept requests for clarification from prospective Respondents. Questions concerning the conditions and/or specifications of this procurement must be addressed in writing, using the Request for Clarification Form provided in Appendix C. Written Requests for Clarification delivered to the ITN Administrator in a proper and timely manner will receive a written answer communicated publically via VBS.

Requests for clarification and answers thereto shall be considered an addendum to, and an integral part of, this solicitation document.

5.03 MANDATORY REQUIREMENTS ASSESSMENT

Upon timely and proper receipt, each Response will be reviewed to determine whether the Respondent meets the minimum qualifications and satisfies mandatory requirements set forth in this solicitation. The Board reserves the right to determine which Responses meet the minimum criteria and the right to accept Responses that deviate in a minor or technical fashion, as determined by the Board.

This assessment is binary (pass/fail); there are no points awarded for meeting the minimum qualifications or satisfying the mandatory requirements. Respondents that do not meet the minimum qualifications or satisfy the mandatory requirements will be removed from consideration.

5.04 EVALUATION PHASE

Each Response for which the Respondent meets the minimum qualifications and satisfies the mandatory requirements will be evaluated, independently, by members of an Evaluation Team appointed by the Board.

Response Evaluation

The Evaluation Team will award points individually for each component and each Response in the following areas:

Component	Total Points Awarded per Evaluator
Written Response: Organizational Experience (Tab 3)	250
Written Response: Work Examples (Tab 4)	450
Written Response: Audits and Financial Information (Tab 5)	100
Written Response: Pricing Schedule (Tab 6)	200
Total	1000

Pricing Schedule Evaluation

Each Pricing Schedule Response will be evaluated relative to the lowest responsive price offered. Points will be awarded using the following formula:

$(X/N) \times P = Z$; where:

X = Lowest Responsive Pricing Schedule;

N = Proposed Pricing Schedule;

P = Maximum Points Available

Z = Awarded Points

The calculated points awarded will be rounded to the nearest whole number. Decimal values less than 0.50 will be rounded down to the next whole number; decimal values greater than, or equal to, 0.50 will be rounded up to the next whole number. The minimum possible calculated points awarded will be 0.

Ranking of Respondents and Selection of the Shortlist for Negotiation

After the Evaluation Team has evaluated each Response independently, the individual scores will be aggregated to determine the total score for each Response. The Respondents will be ranked based on the total score for their Response and the Board will select the highest-ranked Respondents, within a competitive range, for negotiation (Shortlist).

The Board intends to select up to five (5) Respondents to the Shortlist, in each ITN component. However, the Board reserves the right, after posting notice thereof, to expand the shortlist to include additional responsive Respondents for negotiation. The Board will provide individual notice to each Shortlist Respondent.

5.05 NEGOTIATION PHASE

The Board will appoint a Negotiation Team to conduct negotiations with the Shortlist Respondents. The Board intends to negotiate concurrently with the Shortlist Respondents, however, the Board may change the method of negotiation (e.g., concurrent versus by order of ranking), if it determines that to do such would be in the best interest of the Board.

When negotiations have been completed, the Board will award a contract to the responsive and responsible Respondent(s) that the Board determines will provide the best value to the Board. The Board will provide public notice of selection via Notice of Intended Award posted on VBS.

6. GENERAL INFORMATION

6.01 LEGAL REQUIREMENTS

Applicable provisions of all federal, state, county, and local laws, will govern development, submittal and evaluation of all Responses received hereto and will govern any and all claims and disputes that may arise between persons submitting a Response and the Board. Lack of knowledge by any Respondent will not constitute a cognizable defense against the legal effect thereof.

6.02 BOARD RIGHTS

The Board, in its sole discretion, may take any of the following actions and may determine the scope and manner of such actions, the Respondent(s) affected, and whether to provide concurrent public notice of such decision:

1. Modify this solicitation, after posting notice thereof.
2. Review and rely on relevant information contained in a Response.
3. Change the members of the Evaluation Team and/or Negotiation Team.
4. Request supplemental Responses from a Respondent.
5. Contact previous clients of a Respondent, as identified by the Respondent, to inquire about the Respondent's ability to deliver on the services offered.
6. Expand the Shortlist, after posting notice thereof, to include additional responsive Respondents.
7. Require any or all Respondent(s) to address services, prices, or conditions offered by any other Respondent.
8. Schedule additional negotiating sessions with any or all Respondent(s).
9. Decline to conduct further negotiations with any Respondent.
10. Reopen negotiations with any Respondent.
11. Require any or all Respondent(s) to provide a best and final offer.
12. Take any administrative steps deemed necessary to determine final award, including additional fact-finding, evaluation, or negotiation where necessary and consistent with the terms of this procurement.
13. Arrive at an agreement with any Respondent, finalize principal contract terms and terminate negotiations with any or all other Respondents, regardless of the status of, or scheduled negotiations with, such other Respondents.
14. Accept or reject any and all Responses and to award the contract in the best interests of the State of Florida.

6.03 PUBLIC ACCESS TO RECORDS

Responses to this solicitation shall result in the Respondent waiving any and all rights relating to confidentiality, or claims thereof, upon delivery to the Board. All electronic and written communications pertaining to this procurement, whether sent from or received by the Board, and all Responses including, without limitation, administrative information, proposed services/commodities, and price will be subject to disclosure after contract award as required under Chapter 119, Florida Statutes.

Negotiations between the Board and Respondent are exempted from being held as public meetings by Section 286.0113(2)(a), Florida Statutes. In addition, strategy meetings held by Negotiation Team are also exempted by Section 286.0113(2)(a), Florida Statutes.

6.04 PROPERTY OF BOARD

All Responses become the property of the Board upon receipt and will not be returned to the Respondent. The Board has the right to use any and all ideas or adaptations of ideas contained in any Response received in for this solicitation. Selection or rejection of the Response will not affect this right. All Responses become public documents upon submission. All materials and data produced for the Board under the contract resulting from this solicitation will be owned by the Board unless otherwise agreed to in writing by the Board.

6.05 COST OF DEVELOPING AND SUBMITTING RESPONSES

Neither the Board nor the State of Florida is liable for any of the costs incurred by the Respondent in preparing and/or submitting a Response.

APPENDIX A: CONTRACT

APPENDIX A: CONTRACT FOR ADVERTISING / DIGITAL MARKETING, AND PUBLIC RELATIONS SERVICES

This Contract for Advertising and Creative, Digital Marketing, and Social Media Services / Public Relations, Partnerships, and Events (the "Contract"), is entered into this _____ day of _____, _____, by and between the FLORIDA PREPAID COLLEGE BOARD ("the Board"), an agency of the State of Florida, and _____ ("the Contractor"), a corporation doing business under the laws of the State of _____ and doing business in the State of Florida.

The Contract results from ITN #19-04 for Advertising / Digital Marketing, and Public Relations Services for the Florida Prepaid College Board, the Stanley G. Tate Florida Prepaid College Foundation, and ABLE United issued on Thursday, September 19, 2019 (the "ITN").

In consideration of the services to be performed and the payments to be made, together with the mutual covenants and conditions hereinafter set forth, the parties agree as follows:

PART 1: SERVICES

1. REPRESENTATIONS AND WARRANTIES

The Contractor represents and warrants that:

A. It is lawfully organized and constituted under all federal, state and local laws, ordinances and other authorities of its domicile, and is otherwise in full compliance with all legal requirements of its domicile.

B. It is possessed in the legal authority and capacity to enter into and perform this Contract.

C. It has been duly authorized and registered to operate and do business in all places where it will be required to conduct business under this Contract; that it has obtained, at no cost to the State of Florida or the Board, all necessary licenses and permits required in connection with this Contract; and that it will fully comply with all laws, decrees, labor standards and regulations of its domicile and wherever performance occurs during its performance of this Contract.

D. It has no present interest, nor shall acquire any interest, which would conflict in any manner with its duties and obligations under this Contract.

E. It has the expertise and ability to perform all services required under this Contract.

F. It will assign sufficient personnel with sufficient experience and knowledge of the products and/or services to be provided to the Board under this Contract in order to fulfill all of its obligations under this Contract.

2. DESCRIPTION OF SERVICES

A. The Contractor will be required to perform the services described in Exhibit A of this Contract.

B. All provisions of the Contractor's Proposal, including the Supplemental Response, in response to that ITN (the "Proposal"), the written questions submitted to the Board permitted by the ITN, the written responses to such questions, and all provisions of the ITN, apply to the parties during the life of this Contract and any renewal of this Contract. To this end, these documents are incorporated by reference and attached to this Contract as Exhibit B.

3. NONEXCLUSIVE RIGHTS

By this Contract, the Board does not intend to grant any firm the exclusive rights to provide all materials or services required by the Board during the period covered by the Contract.

4. CONSIDERATION

A. The Board agrees to pay the Contractor for services, to the extent permitted by Paragraph 10, "Annual Appropriations and Availability of Funds", on a monthly basis in accordance with the fee schedule attached hereto as Exhibit C, which is incorporated into this Contract by reference. The Contractor shall submit its invoices monthly with payment terms of net 30. Payment of the previous month's activity will be based upon an invoice submitted for services rendered in sufficient detail to ensure proper pre-audit and post-audit thereof.

(i) To receive payment, the Contractor must submit a monthly invoice to the Board for services not included in the retainer, showing actual hours worked for the preceding month on Board activities by the Contractor's employees, excluding secretarial and administrative personnel. All hours shown as worked by the Contractor's employees on Board activities must be supported by actual time records, which shall be available for audit as provided by the Contract.

(ii) Prior to incurring any expenses related to or for any of the services described in Paragraph 2, "Description of Services", the Contractor shall provide the Board with a Detailed Cost Estimate which shall, at a minimum:

(i) Describe the services or materials to be provided or produced.

(ii) Itemize the costs for various activities included in the estimate.

(iii) Itemize the out-of-pocket costs to the Contractor, billed at net.

(iv) Identify whether expenses for photographs and commercial talent are for permanent ownership or are residual fees for the life of the campaign, including the respective costs for each.

(v) Indicate the total cost of the service or materials.

- (iii) The Contractor shall not incur costs for any of the services or materials described in Paragraph 2 without obtaining the prior written approval of the Board's Executive Director or the Director of Marketing of the Board for the Detailed Cost Estimate for each such service. If, at any time after a Detailed Cost Estimate is approved, the Contractor has reason to believe that additional funds will be required to complete a project or services approved by the Board in a Detailed Cost Estimate, the Contractor immediately shall submit a revised Detailed Cost Estimate to the Board for approval prior to incurring any costs which are in excess of the original cost estimate. The revised Detailed Cost Estimate shall include the reasons for the additional costs.
- (iv) The Contractor must pay all uncontested third party, pass-through invoices within 30 calendar days of receipt of the invoice and the required supporting documentation from the third party. The contractor will provide, upon Board request, proof of third party invoice payment by the Contractor. Reimbursement of subcontracted services, freelance charges, and other, similar out-of-pocket expenditures by the Contractor shall be at the actual cost to the Contractor. Subcontracted charges for broadcast media and print production must be supported by competitive bids from not fewer than two companies, unless prior written approval is received from the Board.
- (v) All travel associated with providing any of the services or materials described in Paragraph 2 must be approved in advance by the Board. Payment of any reimbursement for any such travel will be paid in accordance with the requirements of s. 112.061, Florida Statutes. Any line item cost in a Detailed Cost Estimate may vary, but the total of any Detailed Cost Estimate approved by the Board cannot be exceeded.

B. The Contractor will provide to the Board a monthly Budget Report which will include, at a minimum, the total amount available for each expenditure category pursuant to the budget and the amounts of paid and unpaid monthly consideration, unpaid approved Detailed Cost Estimates, paid expenditures associated with approved Detailed Cost Estimates, and unallocated budget dollars associated with each expenditure category in the Budget. Detailed information should be available at the request of the Board.

5. CONTRACT MANAGER

A. The Contractor shall perform the services pursuant to this Contract under the direction and control of the Executive Director of the Board and the Director of Marketing of the Board. The Contractor shall designate one individual to be the Contract Manager.

B. The Contract Manager, or a designee approved by the Board, shall attend the quarterly meetings of the Florida Prepaid College Board members, as requested.

C. The Contract Manager shall meet, as requested, with either the Board's Executive Director or Director of Marketing for the purpose of reviewing progress and providing necessary guidance in solving problems which may arise. These meetings shall take place at the Board's headquarters in Tallahassee, Florida.

D. On a monthly basis, the Contract Manager shall be available for a conference call with the Board office and the Board's vendors, as invited by the Board, for a Management Team meeting.

E. The Contract Manager shall immediately notify the Executive Director and the Director of Marketing, in the event of any service deficiency or failure impacting the Board. If such notification by the Contractor is not made within twenty-four (24) hours following any service deficiency or failure, it will not be deemed a timely notification unless the Contractor can show cause why notification within the first twenty-four hours was not practicable.

6. TERM

A. The term of this Contract shall be for an initial period of three (3) years, commencing on _____, 2020, and continuing through ___, 2023. The Board reserves the absolute right, in its sole discretion, to extend the contract(s) for up to three (3) additional years under the terms and conditions set forth herein upon delivery of a notice of renewal at least ninety (90) days prior to the expiration of this Contract. The extension may be divided into increments or may be for a complete term. The Board also may review and revise the necessary services to be performed hereunder at the end of three (3) years provided, however, that any renewal or extension which modifies any of the terms of this Contract will be in writing and executed by both parties to this Contract.

B. The continuation of this Contract shall be contingent upon the satisfactory performance and evaluation of the Contractor by the Board. Further, the Board may terminate this Contract or any part of this Contract, without penalty or cost to the Board, at its convenience at any time for any reason and such termination will be effective at such time as is determined by the Board. The Contractor may not terminate this Contract except in the event that: 1) the Contractor is not paid for its services hereunder; 2) the Contractor notifies the Board of such nonpayment; 3) the Board does not have a reasonable reason for withholding payment; and 4) the Board fails to cure the nonpayment within thirty (30) days after receipt of such notice.

C. Notwithstanding the provisions of subparagraphs (a) and (b) above, if during the term of this Contract the Contractor files for bankruptcy protection of any kind or if a petition for involuntary bankruptcy is filed against the Contractor, under the United States Bankruptcy Code or any state bankruptcy laws, or if the Contractor is taken into receivership or otherwise taken over by any state or federal regulatory agency (all hereinafter collectively referred to as the "bankruptcy petition"), then in such circumstances the term of this Contract will automatically convert to a single one (1) year term with a termination date of June 30th immediately following

the date on which a bankruptcy petition is first filed or the date on which any regulatory takeover first occurs. In any such event, the Board shall have the option to renew the Contract or any portion of the Contract under the terms and conditions set forth in the ITN, or such conditions as may be negotiated between the parties, for a number of one (1) year extensions of this Contract which shall be equal to three (3) minus the number of years remaining under the original term of this Contract pursuant to subparagraphs (a) and (b), as may be appropriate prior to the filing of any bankruptcy petition. Each such one (1) year renewal will be contingent upon, among other things, the availability of funds, continued need, and satisfactory performance by the Contractor.

7. DISPOSITION OF FILES ON TERMINATION

A. Not later than one hundred and eighty (180) days prior to the scheduled termination of this Contract, or not later than thirty (30) days after the Board notifies the Contractor of any termination of this Contract, the Contractor shall prepare and submit to the Board for approval a transition plan by which the Contractor will transfer responsibility for the services required under this Contract to the Board or to the Board's designee in an orderly and transparent manner. The Board may require changes to the proposed transition plan. After approval of the transition plan by the Board, the Contractor shall implement the approved transition plan and shall work cooperatively with the Board and any designee of the Board to effect an orderly transition to the Board or its designee.

B. Upon termination of this Contract, all files, materials and information held by the Contractor in connection with the performance of the services required pursuant to this Contract shall be turned over to the Board or its designee.

C. The Contractor agrees that it is liable for and will pay any such damages and costs incurred by the Board, including reasonable attorney's fees and costs, related to the failure of the Contractor to:

- (i) Prepare and submit to the Board for approval a transition plan by which the Contractor will transfer responsibility for the services required under this Contract to the Board or its designee;
- (ii) Implement the transition plan approved by the Board, including any changes thereto which are required by the Board;
- (iii) Work cooperatively with the Board to effect an orderly transition to the Board or its designee; or
- (iv) Turn over all files, materials and information held by the Contractor in connection with the performance of the services under this Contract to the Board or the Board's designee may be assessed against the Contractor by the Board.

D. After termination of the Contract, the Contractor, any of its subcontractors, or any related entity of the Contractor or any of the Contractor's Subcontractors shall not utilize any information, including, without limitation thereto, any account information concerning participants in the Prepaid Plan, the Savings Plan, or ABLE, resources or advertising materials arising from or connected with the Board, the Foundation, the Prepaid Plan, the Savings Plan, or ABLE in connection with the sale, promotion, advertising, or marketing of participation in a qualified state tuition program or of any other product or service. For purposes of this Paragraph, the term "related entity" means any corporation, partnership, joint venture, limited liability company, or other entity, including parent company, subsidiary company, predecessor company, or any member of an affiliated group of corporations, as defined in s. 1504 of the Internal Revenue Code.

E. The provisions of this Paragraph and its subparts shall survive the termination of this Contract.

PART II: SPECIAL TERMS

8. INDEPENDENT CONTRACTOR

The Board and the Contractor represent that they are acting in their respective capacities and not as agents, employees, partners, or associates of one another.

9. PERSONNEL

The Board may request replacement of any of the Contractor's personnel that the Board believes unable to carry out the responsibilities of the Contract at any time. The Contractor shall give the Board twenty (20) days' notice prior to assigning any of its personnel to positions requiring specific management of the delivery of the services or products, during which time the Board shall have the right to approve such assignment. The Board agrees that such approval will not be unreasonably withheld.

10. ANNUAL APPROPRIATIONS AND AVAILABILITY OF FUNDS

Performance by the Board under this Contract will be subject to and contingent upon the availability of monies lawfully appropriated to the Board and applicable for the purposes of this Contract.

11. MODIFICATION

This Contract represents the entire agreement of the parties. Any alterations, variations, changes, modifications or waivers of provisions of this Contract shall only be valid when they have been reduced to writing, duly signed by each of the parties hereto, and attached to the original of this Contract. All Amendments to the Contract in which costs to the Board do not exceed \$25,000.00 per fiscal year can be effected by execution of a Letter of Agreement by the parties. The Letter of Agreement must be executed by either the Chairman or the Executive Director for the Board and an authorized agent of the Contractor in order to be effective. Each Letter of Agreement must contain the estimated cost to the Board of the service being provided, per fiscal year. All properly executed Letters of Agreement shall become part of the Contract.

12. SUBCONTRACTORS

The Contractor may enter into written subcontracts for performance of its duties under this Contract. All subcontractors and subcontracts will be subject to the prior written approval of the Board which may be withheld in the Board's sole discretion. The Board may disapprove any subcontractor or subcontract if such disapproval would be in the best interests of the Board. The Board may inspect and acquire any of the subcontract documents executed between the Contractor and any subcontractor. No subcontract which the Contractor enters into with respect to performance under this Contract will in any way relieve the Contractor of any responsibility for performance of duties stipulated in this Contract. The Board reserves the right to communicate directly with any subcontractor's project manager regarding performance of tasks required under this Contract.

13. PUBLIC ACCESS TO RECORDS

Section 1009.981(6), Florida Statutes, provides that all information that identifies the benefactors or qualified beneficiaries of any participation agreement and Section 1009.98(6), Florida Statutes, provides that all information that identifies the purchasers or beneficiaries of any advance payment contract, is not subject to the provisions of Section 119.07(1), Florida Statutes, the Public Records Law. All other documents, papers, letters, or other materials relating to this Contract that are made or received by the Contractor in conjunction with the Contract, and which are required by law to be maintained, will be available for public access and for audit purposes for a period of three (3) years after the expiration of the Contract. Said records will also be maintained per Chapter 119 and other applicable Florida Statutes. The provisions of this Paragraph shall survive the termination of this Contract.

14. INDEMNIFICATION

A. The Contractor will act as an independent contractor and not as an employee of the Board in the performance of the tasks and duties which are the subject of this Contract. The

Contractor shall be liable, and agrees to be liable for, and shall indemnify, defend, and hold the Board harmless from all claims, suits, judgments, or damages (including litigation costs and reasonable attorney's fees) arising generally from the Contractor's, or any subcontractor's, fraud, negligence or misconduct, or any subcontractor's fraud, negligence or misconduct, of the tasks and duties which are the subject of this Contract, including, but not limited to:

- (i) Obtaining consent of any nature whatsoever;
- (ii) Protecting the Board against claims for the unauthorized use of name or likeness of any person, libel, slander, defamation, disparagement, piracy, plagiarism, unfair competition, idea misappropriation, infringement of copyright title, patent, slogan or other property rights and any invasion of the right of privacy; and
- (iii) Actions arising under Chapter 119, Florida Statutes.

B. The Contractor will notify the Board in writing immediately of any claim or suit against the Contractor arising from or related to the Contractor's tasks and duties which are the subject of this Contract. The Contractor shall not settle, compromise, mediate, agree to dismiss, or voluntarily agree to the entry of any judgment, temporary injunction or permanent injunction, in any claim or suit against the Contractor arising from or related to the Contractor's tasks and duties which are the subject of this Contract without the prior written authorization of the Board. Nothing in this Contract authorizes the Contractor to waive the Board's immunity from suit under the Eleventh Amendment to the United States Constitution.

C. The provisions of this Paragraph and its subparts shall survive the expiration or termination of this Contract.

15. INTERPRETATION, VENUE AND DISPUTE RESOLUTION

A. The validity, interpretation and performance of this Contract shall be controlled by and construed under the laws of the State of Florida. This Contract shall be subject to the Administrative Rules of the Board.

B. The sole and exclusive manner of resolution of all claims, disputes or controversies related to or arising under or from this Contract shall be pursuant to Rules 19B-14.001, 19B-14.002, 19B-14.003, Florida Administrative Code, as amended from time to time.

C. Any and all litigation arising under this Contract shall be instituted in accordance with subparagraph (b) in Leon County, Florida. All appeals shall be to the First District Court of Appeals of the State of Florida.

D. Any dispute concerning performance of the Contract shall be decided by the Board's designated contract manager, who shall reduce the decision to writing and serve a copy on the Contractor. The decision shall be final and conclusive unless within twenty one (21) days from the date of receipt, the Contractor files with the Board a petition for administrative hearing. The Board's decision on the petition shall be final, subject to the Contractor's right to review pursuant to Chapter 120 of the Florida Statutes. Exhaustion of administrative remedies is an absolute condition precedent to the Contractor's ability to pursue any other form of dispute resolution; provided, however, that the parties may employ the alternative dispute resolution procedures outlined in Chapter 120.

E. All services provided under this Contract shall be provided in accordance with the ITN. All provisions of the ITN, the Questions and Answers regarding the ITN, and the Proposal submitted in response to the ITN, including the Supplemental Response, are incorporated by reference and attached to this Contract as Exhibit B. In the event of any conflict, in the opinion of the Board, between any provision of this Contract and the ITN, the Questions and Answers regarding the ITN or the Proposal, this Contract shall govern the conduct of the Board and the

Contractor. In the event of any conflict, in the opinion of the Board, between the ITN and the Contractor's Proposal, the ITN shall govern the conduct of the Board and the Contractor. In the event of any conflict, in the opinion of the Board, between the ITN and the Questions and Answers regarding the ITN, the Questions and Answers regarding the ITN shall govern the conduct of the Board and the Contractor. In the event of any conflict, in the opinion of the Board, between the Questions and Answers regarding the ITN and the Proposal, the Questions and Answers regarding the ITN shall govern the conduct of the Board and the Contractor.

F. The provisions of this Paragraph and its subparts shall survive the expiration or termination of this Contract.

16. WAIVER

Failure of either party to this Contract to object or to take affirmative action with respect to any conduct of the other which is in violation of the terms of this Contract shall not be construed as a waiver of the violation or breach, or any future violation or breach.

17. AUDIT OF CONTRACT PROCEDURES

The Board reserves the right to audit all of the Contractor's and the Contractor's subcontractors' procedures, and financial and accounting records using Board employees, its designees or other state agencies as provided by law.

18. INVOICES

Any invoices submitted by the Contractor seeking payment for services rendered under the terms of this Contract will be submitted to the Board in sufficient detail to ensure proper pre-audit and post-audit thereof. The Contractor shall submit its invoices monthly with payment terms of net 30.

19. PAYMENT SCHEDULE

The Board may withhold any payment, partial or whole, to the Contractor for nonperformance or unsatisfactory performance or as liquidated damages as provided herein.

20. REMEDIES

A. In the event of nonperformance, malfeasance, misfeasance, or other action which is less than a material breach of this Contract and which is noticed to the Contractor by the Board in writing, the Board shall have the right, in its sole discretion, to withhold payment of up to 50% of the current and subsequent invoices. The Contractor shall have three (3) days from the date written notice of such non-performance is sent by the Board to the Contractor to deliver an incident report and a reasonable plan for cure, as determined by the Board, prior to the Board withholding payment.

B. If the Board deems a cure to be inadequate, the Board may continue, in its sole discretion, to withhold payment of up to 50% of the current and subsequent invoices, until the cure is deemed adequate by the Board.

C. If the Board deems a cure to be inadequate or if the Contractor does not cure the non-performance within fifteen (15) days from the date the Board sent written notice to the Contractor of the non-performance, the Board may determine, in its sole discretion, that all or any portion of any amounts withheld are not payable and are nonrefundable beginning fifteen (15) days after the date the Board sent written notice to the Contractor of the non-performance.

D. Upon mutual written agreement by both parties that such action giving rise to the withholding of payment has been cured, the Board shall certify said invoice for payment, subject to any nonrefundable remedy or damage already imposed by the Board.

E. The Contractor is liable to the Board for all refund amounts certified and invoices paid that are subsequently found to be in error.

F. The remedies imposed under this Paragraph and its subparts are in addition to any liquidated damages authorized to the Board pursuant to this Contract.

G. The provisions of this Paragraph and its subparts shall survive the termination of this Contract.

21. ASSIGNMENT

This Contract is not assignable by the Contractor except with the prior written approval of the Board which may be withheld in the Board's sole discretion.

22. LIQUIDATED DAMAGES

The Contractor agrees to be subject to the following liquidated damage:

A. The Board may deduct as liquidated damages from any pending or subsequent invoice from the Contractor, the sum of \$250 per day and per service requirement for each work day on which any of the service requirements described in Paragraph 2 are not met. These damages are in addition to any remedy or any other liquidated damages available under this Contract.

B. The Board may deduct as liquidated damages from any pending or subsequent invoice from the Contractor, the sum of \$250 per day and for each report required pursuant to Paragraph 2, which are not provided when due. These damages are in addition to any remedy or any other liquidated damages available under this Contract.

C. The provisions of this Paragraph shall survive the termination of this Contract.

23. TAXES

The Board shall have no responsibility for the payment of any federal, state, or local taxes which become payable by the Contractor or any of its subcontractors as a result of this Contract.

24. STATE HOLIDAYS

The staff of the Contractor assigned to this Contract shall observe only official state holidays.

25. TRAVEL

Except as provided in Paragraph 4, "Consideration", the Board shall not reimburse the Contractor for travel expenses incurred in connection with this Contract.

26. TITLES, HEADINGS, AND CAPTIONS

All titles, headings and captions used to identify the context of any Section or Paragraph within this Contract are for convenience of reference only and will not be construed as a part or limitation of those provisions to which they refer.

27. SEVERABILITY

If any of the provisions of this Contract are held invalid or unenforceable, such invalidity or unenforceability shall not affect any other provisions, and this Contract shall be construed and enforced as if such provisions had not been included.

28. BOND

At the time this Contract is executed, the Contractor agrees to post an appropriate payment and performance bond with the Board in an amount equal to the estimated consideration due for the first three months of the Contract pursuant to Exhibit C, rounded up to the nearest thousand, to ensure its performance for the services required under this Contract. The bond shall be executed in favor of the Board and shall be issued by a surety duly licensed and authorized to do business in the State of Florida and shall be valid for the entire term of this Contract, exclusive of any renewals. Both the bond and the surety shall be acceptable to the Board in its sole discretion. If this Contract is extended, the Contractor shall deliver a replacement

bond for the entire period of the Contract extension to the Board not later than sixty (60) days prior to the beginning of the term of the extension.

29. BOARD AUTHORITY

This Contract and all payments provided herein are subject to the provisions of Part IV, Chapter 1009, Florida Statutes, or any successor statute, and the rules of the Board. All references in this Contract to Part IV, Chapter 1009, Florida Statutes, include all successor statutes. The Board has taken all necessary action to duly authorize the execution, delivery and performance of this Contract.

30. GENERAL CONDITIONS

A. The Board may cancel this Contract if the Contractor refuses to allow public access to any documents, papers, letters, or other materials subject to the provisions of Chapter 119, Florida Statute, and made or received by the Contractor in conjunction with the Contract.

B. Notwithstanding "prior approval" requirements which may be reserved to the Board under this Contract and Part IV, Chapter 1009, Florida Statutes, such requirement does not relieve or mitigate the Contractor's ultimate responsibility for ensuring and guaranteeing the quality and timeliness of work and services to be provided under this Contract. The Contractor is solely responsible for performing the services specified herein to the satisfaction of the Board.

C. The Board reserves the right, in its own best interests, to unilaterally modify, reject, cancel or stop any and all plans, schedules or work in progress.

D. The Contractor shall not initiate any communication with any member of the Board, on any matter related to this Contract or related to the duties of the Board under Part IV, Chapter 1009, Florida Statutes, or any successor statute, or which in any way relate to the Contractor's activities. Except at publicly noticed meetings of the Board or any of its committees,

all communication by the Contractor directed to the Board, or any member of the Board, shall only be sent to the Executive Director of the Board who will forward same to the Board or to the appropriate member. If the Contractor receives any communication from any member of the Board, the Contractor shall notify the Executive Director of the Board immediately, and shall take no further action on any matter related to this Contract or any other matter related to the duties of the Board under Part IV, Chapter 1009, Florida Statutes, or any successor statute, until advised by the Executive Director.

E. Throughout the term of the Contract, the Contractor shall comply with all applicable federal, state and local laws, regulations, rules or ordinances, as amended from time to time, including, but not limited to, Section 529 of the Internal Revenue Code, any federal regulations relating to qualified state tuition programs, applicable Florida laws, including without limitation Part IV, Chapter 1009, Florida Statutes, all administrative rules adopted by the Board, and the securities laws of the United States and the State of Florida. If during the course of the Contract these laws, regulations, rules or ordinances are amended, the Contractor shall revise its services as necessary to preserve such compliance at no additional cost to the Board.

F. The Board reserves the right to inspect the Contractor's facilities at any time with prior notice of twenty-four hours.

G. All references in the Contract to Florida Statutes, include all successor statutes thereto.

31. ENTIRE AGREEMENT

This Contract constitutes the entire understanding of the parties and supersedes any prior written or oral agreements between them.

32. NOTICES

All notices, requests, instructions, other advice, or documents required hereunder will be in writing and delivered personally or mailed by first class mail, postage prepaid, as follows:

If to the Board: Kevin Thompson, Executive Director
1801 Hermitage Blvd., Suite 210, Tallahassee, Florida 32308
Telephone: (850) 488-8514
Facsimile: (850) 488-3555

With a copy to: GrayRobinson, P.A.
Attention: Attorney for the Florida Prepaid College Board
301 Bronough Street, Suite 600, Tallahassee, Florida 32301
Telephone: (850) 577-9090
Facsimile: (850) 222-3494

If to the Contractor: _____

With a copy to: _____

IN WITNESS THEREOF, the parties have caused this Agreement to be executed and attested by their respective officers thereunto duly authorized on the day and year first above written.

FLORIDA PREPAID COLLEGE BOARD

Attested to by

By: _____
Its: Executive Director

Witness

IN WITNESS THEREOF, the parties have caused this Agreement to be executed and attested by their respective officers thereunto duly authorized on the day and year first above written.

Attested to by

By: _____
Its: _____

Witness

EXHIBIT A

Please refer to Section 3.01 of the ITN.

EXHIBIT B

To include the Contractor's Proposal, including the Supplemental Response, all provisions of the ITN, the Questions and Answers regarding the ITN, etc.

EXHIBIT C

To include the agreed-upon fee schedule

APPENDIX B: WRITTEN RESPONSE PACKET

APPENDIX B: WRITTEN RESPONSE PACKET

Solicitation Number: ITN 19-04

Title: Advertising / Digital Marketing, and Public Relations Services for the Florida Prepaid College Board, the Stanley G. Tate Florida Prepaid College Foundation, and ABLE United

Issuer: Florida Prepaid College Board
1801 Hermitage Boulevard, Suite 210
Tallahassee, FL 32308

When completing this Written Response Packet, the Respondent should give clear, concise, and, where appropriate, quantifiable replies to all questions. The length of the Response is at the discretion of the Respondent, however, Responses are expected to be brief and to contain full and fair disclosure of essential elements without references to an appendix or attachment, unless otherwise requested.

This packet is made available in Microsoft Word on the Board's website for ease of completion. Please visit: myfloridaprepaid.com/who-we-are/about-the-board/board-reports-and-plans/.

TAB 1: INVITATION TO NEGOTIATE ACKNOWLEDGEMENT

Solicitation Number:	ITN 19-04
Title:	Advertising / Digital Marketing, and Public Relations Services for the Florida Prepaid College Board, the Stanley G. Tate Florida Prepaid College Foundation, and ABLE United
Issuer:	Florida Prepaid College Board 1801 Hermitage Boulevard, Suite 210 Tallahassee, FL 32308

This sheet and the accompanying negotiation documents constitute an offer from the Respondent to provide the services detailed in the solicitation under the contractual terms provided therein.

By completing this acknowledgment, I agree to abide by all conditions of this negotiation and certify that (1) I am authorized to sign this response and (2) that the offer complies with all requirements of the solicitation.

Respondent (Firm): _____

Contact Person: _____

Address: _____

Telephone: _____

E-Mail Address: _____

Authorized Signature: _____

Date: _____

Printed Name & Title: _____

TAB 2: MINIMUM QUALIFICATIONS

Solicitation Number: ITN 19-04

Title: Advertising / Digital Marketing, and Public Relations Services for the Florida Prepaid College Board, the Stanley G. Tate Florida Prepaid College Foundation, and ABLE United

Respondent: _____

The following represents minimum qualifications for each component of this ITN – the applicable section must be completed below for each component that the Respondent is replying to. A mark in a field indicates an affirmative response to the statement. Any Respondent that does not satisfy the criteria herein shall be rejected.

EXPERIENCE: Advertising and Creative, Digital Marketing, and Social Media Services
Please leave blank if not responding to this component.

Respondents must affirmatively state, in writing, that as of June 30, 2019, the Respondent has:

The following minimum years of experience providing the applicable Communication Services:

- Advertising and Creative Services: 5 years _____
- Digital and Social Media Services: 5 years _____

The following minimum annual billings providing the applicable Communication Services:

- Advertising and Creative Services: \$5,000,000 _____
- Digital and Social Media Services: \$1,500,000 _____

A permanent and active place of business in the state of Florida. _____

EXPERIENCE: Public Relations, Partnerships and Events
Please leave blank if not responding to this component.

Respondents must affirmatively state, in writing, that as of June 30, 2019, the Respondent has:

The following minimum years of experience providing the applicable Communication Services:

- Public Relations, Partnerships and Events: 5 years _____

The following minimum annual billings providing the applicable Communication Services:

- Public Relations, Partnerships and Events: \$750,000 _____

A permanent and active place of business in the state of Florida. _____

TAB 3: ORGANIZATIONAL EXPERIENCE

Solicitation Number: ITN 19-04

Title: Advertising / Digital Marketing, and Public Relations Services for the Florida Prepaid College Board, the Stanley G. Tate Florida Prepaid College Foundation, and ABLE United

Respondent: _____

Organization Overview

- 1) Please introduce the organization by providing a brief overview of structure and history:
 - a) Business name
 - b) Year founded
 - c) Office locations and contact information
 - d) Description of organization structure, including the parent company, subsidiaries, affiliates, etc.
 - e) Brief history of the organization.
 - f) Description of core offerings and service capabilities.
 - g) Description of Respondent's leadership team qualifications and credentials.
 - h) Is the organization a certified Minority Owned Business?
 - i) Provide names, titles and contact information for three (3) current or previous clients who can serve as client references and attest to the Respondent's ability to deliver on the services outlined in Section 3.01.

2) Staffing

- a) Provide an organizational chart and, if not specified in the chart, list the total number of employees with a breakdown by department (e.g. account service, creative, production, media, digital, public relations, etc.).
- b) Briefly describe the key personnel, technical staff and support managers/staff that would be assigned to the Board account, and how the functional areas work together to provide account support; the response must include:
 - i) Name - Team member name and title.
 - ii) Role - Role description and responsibilities.
 - iii) Experience - Evidence of previous experience in this role.
 - iv) Tenure - How long with the organization.
- c) Describe the anticipated working relationship with Respondent and Board, including percentage of time dedicated to the Board by staff member, communication style, project management processes and procedures, etc.

- d) Is the Respondent dependent upon third parties to deliver any of the services offered? If so, name the third parties and explain the services that these parties would deliver.
- e) Where is the Respondent's closest office to Tallahassee, FL with key staff anticipated for this engagement? Explain how the Respondent works with out-of-town clients to ensure timely and accurate communications.

3) Billing

For the Respondent's most recently completed fiscal year, provide the number of clients by annual billing level, within the ranges listed below for the previous three (3) years. Respondents must use the chart template provided, minor formatting (spacing, sizing, etc.) is permitted.

- a) Less than \$1 million,
- b) \$1 million and less than \$3 million,
- c) \$3 million and less than \$5 million,
- d) \$5 million or above

ITN Component	2016				2017				2018			
	<\$1M	\$1-\$3M	\$3-\$5M	>\$5M	<\$1M	\$1-\$3M	\$3-\$5M	>\$5M	<\$1M	\$1-\$3M	\$3-\$5M	>\$5M
1a) Advertising and Creative												
1b) Digital Marketing and Social Media												
2) Public Relations, Partnerships and Events												

*Please note that single digit figures in table header represent dollars in millions

Experience

1) Experience

Respondent shall describe their experience (including Subcontractors', if any) relevant to the Communication Services in this ITN, with detailed evidence where relevant, for the following:

- a) Describe how the Respondent is differentiated from other service providers.

- b) Describe the Respondent's experience in the financial industry.
- c) Describe the Respondent's experience in the area of new product launches or re-launches of existing products.
- d) Describe the Respondent's experience with the use of market research and other data to create effective communications programs.
- e) Describe the Respondent's notable experience in any non-traditional, new or up-and-coming Communication Services strategies.
- f) Describe any experience relevant to working with non-profit Foundations or fundraising entities.
- g) Describe any experience relevant to working with disability organizations or disability-driven campaigns.

- 2) Please describe the organization's ethics policy. Please address how ethical behavior is encouraged and how policy violations are handled.

- 3) Please describe the organization's procedures for ensuring security of customer data and sensitive information, including subcontractors.

Regulatory Restrictions, Litigation and Conflicts of Interest

- 1) Please state whether or not there are any past or pending regulatory restrictions, consent orders, stipulations or litigation to which the Respondent, any subcontractor, any Related Entity of the Respondent or any subcontractor, or any of their principals, owners, directors or officers, has ever been a party that would affect its or their ability to provide the required services or which alleges any unfair, illegal or unethical business practice. If so, a detailed description of each must be provided.

- 2) Please state whether or not any officers, principals, owners, directors and all proposed contract employees of the Respondent or any subcontractor that will provide services related to this product have been convicted of, or have plead guilty or nolo contendere to, any felony, regardless of whether adjudication of guilt was withheld. If so, a detailed description of each incident must be included.

- 3) Please state whether or not any penalties, fines or liquidated damages have been imposed against the Respondent, any subcontractors or any Related Entity of the Respondent or any subcontractor, including without limitation thereto, those associated with any contract for services entered into by the Respondent, any subcontractor, or any Related Entity of the Respondent or any subcontractor, within the past five (5) years. If so, a detailed description of each such incident, including the amount of the penalty, fine, or liquidated damages imposed, must be included in the Response.

- 4) Please state whether or not the Respondent or any subcontractor has ever been involved in any litigation with any Qualified Tuition Plan. If so, a detailed description of each lawsuit must be provided.

- 5) Please state whether or not the Respondent or any Related Entity has ever been contacted by any regulatory body (federal, state or industry) regarding any potentially illegal, non-compliant, unethical or improper activities involving the Respondent, any Related Entity, or any of the employees of the Respondent or any Related Entity. If so, a detailed description must be provided that indicates whether your firm or any Related Entity conducted an investigation of those matters.

- 6) Please confirm that the Respondent has not been placed on the convicted vendor list and that it will comply with the provisions of s. 287.133, F.S. Section 287.133(2)(a), F.S., which provides:

A person or affiliate who has been placed on the convicted vendor list following a conviction for a public entity crime may not submit a bid, proposal, or reply on a contract to provide any goods or services to a public entity; may not submit a bid, proposal, or reply on a contract with a public entity for the construction or repair of a public building or public work; may not submit bids, proposals, or replies on leases of real property to a public entity; may not be awarded or perform work as a contractor, supplier, subcontractor, or consultant under a contract with any public entity; and may not transact business with any public entity in excess of the threshold amount provided in s. 287.017 for CATEGORY TWO for a period of 36 months following the date of being placed on the convicted vendor list.

- 7) Please confirm that the Respondent has not been placed on the discriminatory vendor list and that it will comply with the provisions of s. 287.134(2)(a), F.S. which provides that:

An entity or affiliate who has been placed on the discriminatory vendor list may not submit a bid, proposal, or reply on a contract to provide any goods or services to a public entity; may not submit a bid, proposal, or reply on a contract with a public entity for the construction or repair of a public building or public work; may not submit bids, proposals, or replies on leases of real property to a public entity; may not be awarded or perform work as a contractor, supplier, subcontractor, or consultant under a contract with any public entity; and may not transact business with any public entity.

- 8) Pursuant to the provisions of Chapter 112, F.S., Respondents must disclose with their Response the name of any officer, director, or agent who is also an employee of the State of Florida, the Board, or any State agency. Respondents must disclose the name of any state employee who owns, directly or indirectly, interest of five percent or more in the Respondent. Respondents must disclose all investment products, annuities, mutual funds or other similar type savings plans that are marketed or sold by the Respondent or its proposed subcontractors for other states as a part of a prepaid college fund, a college savings fund, or ABLE program.

TAB 4: WORK EXAMPLES

Solicitation Number: ITN 19-04

Title: Advertising / Digital Marketing, and Public Relations Services for the Florida Prepaid College Board, the Stanley G. Tate Florida Prepaid College Foundation, and ABLE United

Respondent: _____

ADVERTISING AND CREATIVE, DIGITAL MARKETING, AND SOCIAL MEDIA SERVICES

If the Respondent is not responding to the ADVERTISING AND CREATIVE, DIGITAL MARKETING AND SOCIAL MEDIA SERVICES component of this ITN, provide notation in this section indicating that the Respondent is not addressing this component.

1. Work Examples: Advertising and Creative

The Respondent shall provide examples of the Respondent's Advertising and Creative Services, as outlined below, via supplemental attachments. All work examples must be recent (no projects, campaigns, etc. completed prior to January 1, 2016). Each example presented should provide insight into the Respondent's work experience related to this ITN and the Board, particularly Section 3.01 of this ITN. The Respondent may provide a summary detailing the relevance of the work example to this ITN.

a) Provide two (2) examples of **fully integrated marketing campaigns** previously created, produced, and executed. Each campaign must have been produced by the Respondent alone and not as a subcontractor or joint production assignment. Each example shall include the following:

- 1) Situational analysis
- 2) Objective(s) and/or goal(s)
- 3) Creative strategy and execution
- 4) Media strategy and execution
- 5) Performance metrics (results and effectiveness relative to the objectives/goals)

b) Provide three (3) individual examples for each category below.

- 1) Television/Video
- 2) Radio/Audio
- 3) Digital Display
- 4) Paid Social / Native
- 5) Bloggers / Social Media Influencer(s)
- 6) Print / Direct Mail
- 7) Out-of-Home
- 8) Collateral
- 9) Promotional Items

2. Work Examples: Digital Marketing and Social Media Services

The Respondent shall provide examples of the Respondent's Digital Marketing and Social Media Services experience, as outlined below, via supplemental attachments. All work examples must be recent (no projects, campaigns, etc. completed prior to January 1, 2016). Each example presented should provide insight into the Respondent's work experience related to this ITN and the Board, particularly Section 3.01 of this ITN. The Respondent may provide a summary detailing the relevance of the work example to this ITN.

a) Provide examples of three to five (3-5) **web development projects, interactive tools and apps** previously created, produced, and launched. Each example shall include the following:

- 1) Situational analysis
- 2) Objective(s) and/or goals(s)
- 3) Strategy and execution (including development platform and technologies used)
- 4) Performance metrics (results and effectiveness relative to the objectives/goals)

b) Provide examples of three to five (3-5) case studies on **email marketing and / or CRM (customer relationship management) tools** previously implemented. Each example shall include the following:

- 1) Situational analysis
- 2) Objective(s) and/or goals(s)
- 3) Strategy and execution (including communication platform utilized)
- 4) Performance metrics (results and effectiveness relative to the objectives/goals)

c) Provide examples of three to five (3-5) case studies on **social media projects and / or bloggers / influencers** previously implemented. Each example shall include the following:

- 1) Situational analysis
- 2) Objective(s) and/or goals(s)
- 3) Strategy and execution (including social media platforms utilized)
- 4) Performance metrics (results and effectiveness relative to the objectives/goals)

3. Situational Prompt: Advertising and Creative, Digital Marketing, and Social Media Services

The Respondent shall provide a proposed marketing campaign overview to maximize enrollment in the Florida Prepaid College Program in the Miami DMA (Designated Market Area) during the annual Prepaid Plan Open Enrollment period from February 1 – April 30. The campaign overview should include support for advertising, creative, digital marketing, and social media, including three creative concepts. The Respondent should provide strategy, messaging, target audience(s), timeline, and budget allocation for each item within the proposal.

Budget considerations:

- The Board's current annual Communication Services budget is \$6.7 million (see Appendix G: Prepaid/Savings Marketing Plans).
- Please assume an additional budget of \$750,000 per year for this exercise.

Other considerations for the response:

- Respondents may make assumptions about market research findings, but the assumptions should be identified in the response.
- Additional materials may be provided as supplemental attachments.

Please note that this scenario is hypothetical for the purposes of this ITN.

PUBLIC RELATIONS, PARTNERSHIPS, AND EVENTS

If the Respondent is not responding to the PUBLIC RELATIONS, PARTNERSHIPS, AND EVENTS component of this ITN, provide notation in this section indicating that the Respondent is not addressing this component.

1. Work Examples: Public Relations, Partnerships, and Events

The Respondent shall provide examples of the Respondent's Public Relations, Partnerships, and Events experience, as outlined below, via supplemental attachments. All work examples must be recent (no projects, campaigns, etc. completed prior to January 1, 2016). Each example presented should provide insight into the Respondent's work experience related to this ITN and the Board, particularly Section 3.01 of this ITN. The Respondent may provide a summary detailing the relevance of the work example to this ITN.

a) Provide examples of three (3) **Public Relations projects** previously implemented. One or more of the three examples, must include *crisis communications*. In addition, one or more of the three examples must include *government relations* (not necessarily work for a government entity). Each example shall include the following:

- 1) Situational analysis
- 2) Objective(s) and/or goals(s)
- 3) Strategy and execution
- 4) Performance metrics (results and effectiveness relative to the objectives/goals)

b) Provide examples of two (2) successful **strategic partnerships** implemented. Each example shall include the following:

- 1) Situational analysis
- 2) Objective(s) and/or goals(s)
- 3) Strategy and execution
- 4) Performance metrics (results and effectiveness relative to the objectives/goals)

c) Provide examples of two (2) successful **bloggers / social media influencers or brand ambassadors campaigns** implemented. Each example shall include the following:

- 1) Situational analysis
- 2) Objective(s) and/or goals(s)
- 3) Strategy and execution
- 4) Performance metrics (results and effectiveness relative to the objectives/goals)

d) Provide examples of three to five (3-5) **events** (community, media, conference, etc.) implemented. Each example shall include the following:

- 1) Situational analysis
- 2) Objective(s) and/or goals(s)
- 3) Strategy and execution
- 4) Performance metrics (results and effectiveness relative to the objectives/goals)

2. Situational Prompt: Public Relations, Partnerships, and Events

The Respondent shall provide a proposed marketing campaign overview to maximize enrollment in the Florida Prepaid College Program in the Miami DMA (Designated Market Area) during the annual Prepaid Plan Open Enrollment period from February 1 – April 30. The campaign should include support for public relations, partnerships, and events, including at least one creative concept to support the strategy. The Respondent should provide strategy, messaging, target audience(s), timeline, and budget allocation for each item within the proposal.

Budget considerations:

- The Board's current annual Communication Services budget is \$6.7 million (see Appendix G: Prepaid/Savings Marketing Plans).
- Please assume an additional budget of \$150,000 per year for this exercise.

Other considerations for the response:

- Respondents may make assumptions about market research findings, but the assumptions should be identified in the response.
- Additional materials may be provided as supplemental attachments.

Please note that this scenario is hypothetical for the purposes of this ITN.

TAB 5: AUDITS AND FINANCIAL INFORMATION

Solicitation Number: ITN 19-04

Title: Advertising / Digital Marketing, and Public Relations Services for the Florida Prepaid College Board, the Stanley G. Tate Florida Prepaid College Foundation, and ABLE United

Respondent: _____

The Respondent shall provide the following financial information as attachments:

1. Complete copies of each Independent Auditors' Report, Independent Accountants' Review Report, or Accountant's Compilation Report from the Respondent's financial statements for the most recent three (3) year period, or other evidence that clearly indicates the Respondent's financial history, current financial strength, and capital adequacy to provide the services required in this procurement.
2. A complete copy of the most recent Statement on Standards for Attestation Engagements (SSAE) 18 audit report. Respondents should provide an explanation for deficiencies noted in the audit report. If such an audit report was not completed in the most recent two-year period, the Respondent shall provide an explanation for why no audit report was prepared.

To the extent that written explanation is required, please use the space below.

TAB 6: PRICING SCHEDULE

Solicitation Number: ITN 19-04

Title: Advertising / Digital Marketing, and Public Relations Services for the Florida Prepaid College Board, the Stanley G. Tate Florida Prepaid College Foundation, and ABLE United

Respondent: _____

Respondent shall provide an annual retainer figure for each component to which they are responding using the spaces below. The annual retainer shall be inclusive of all services for the applicable component(s) listed as included in the retainer figure(s), per Section 3.01 of the ITN. All out-of-pocket expenses and other third party vendor services shall be reimbursed at actual cost excluding any markup of any nature.

The figure(s) provided for multiple components shall not be conditional upon award of multiple components. If a Respondent, who has addressed multiple components of the ITN in their response, is chosen to the shortlist for one single component, the figure provided in this section for that component shall reflect the offer.

For reference, the final budget for the previous two fiscal years for Prepaid/Savings and ABLE are included in the Marketing Plans in Appendices G and M, respectively.

Annual Fee:

ADVERTISING AND CREATIVE, DIGITAL MARKETING, AND SOCIAL MEDIA SERVICES

(leave blank if not responding to this component)

Annual Fee:

PUBLIC RELATIONS, PARTNERSHIPS, AND EVENTS

(leave blank if not responding to this component)

Respondent may provide additional details on pricing in a supplemental attachment.

APPENDIX C: REQUEST FOR CLARIFICATION FORM

APPENDIX C: REQUEST FOR CLARIFICATION

Solicitation Number: ITN 19-04

Title: Advertising / Digital Marketing, and Public Relations Services for the Florida Prepaid College Board, the Stanley G. Tate Florida Prepaid College Foundation, and ABLE United

Issuer: Florida Prepaid College Board
1801 Hermitage Boulevard, Suite 210
Tallahassee FL 32308

Respondent: _____

No.	ITN Section	ITN Page	Question / Comment
1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			
9.			
10.			

Authorized Signature: _____

Date: _____

Printed Name & Title: _____

APPENDIX D: PREPAID DEMOGRAPHICS AND RESOURCES

APPENDIX D: PREPAID DEMOGRAPHICS AND RESOURCES



CONTRACT YEAR

2019

41.36K

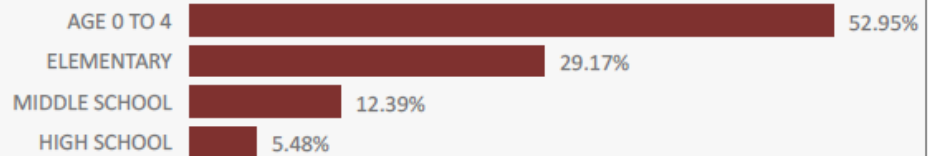
PLANS

31.22K

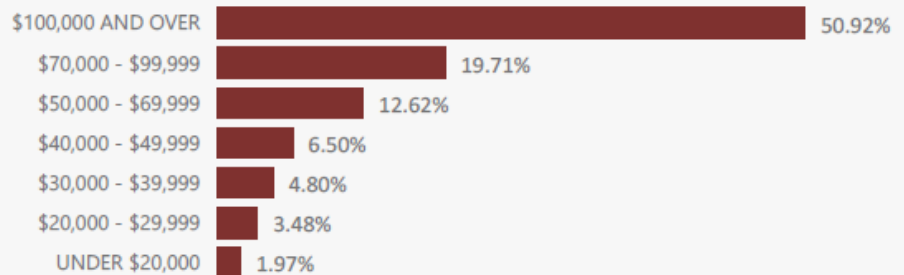
BENEFICIARIES

FLORIDA PREPAID COLLEGE PLAN ENROLLMENT

BENEFICIARY AGE



HOUSEHOLD INCOME



Florida Prepaid College Program Resources / Links

Website:

<https://www.myfloridaprepaid.com/>

Annual Report:

<https://www.myfloridaprepaid.com/wp-content/uploads/2018-Florida-Prepaid-Board-Annual-Report.pdf>

Collateral:

<https://www.myfloridaprepaid.com/resources/forms/>

College Savings Guide:

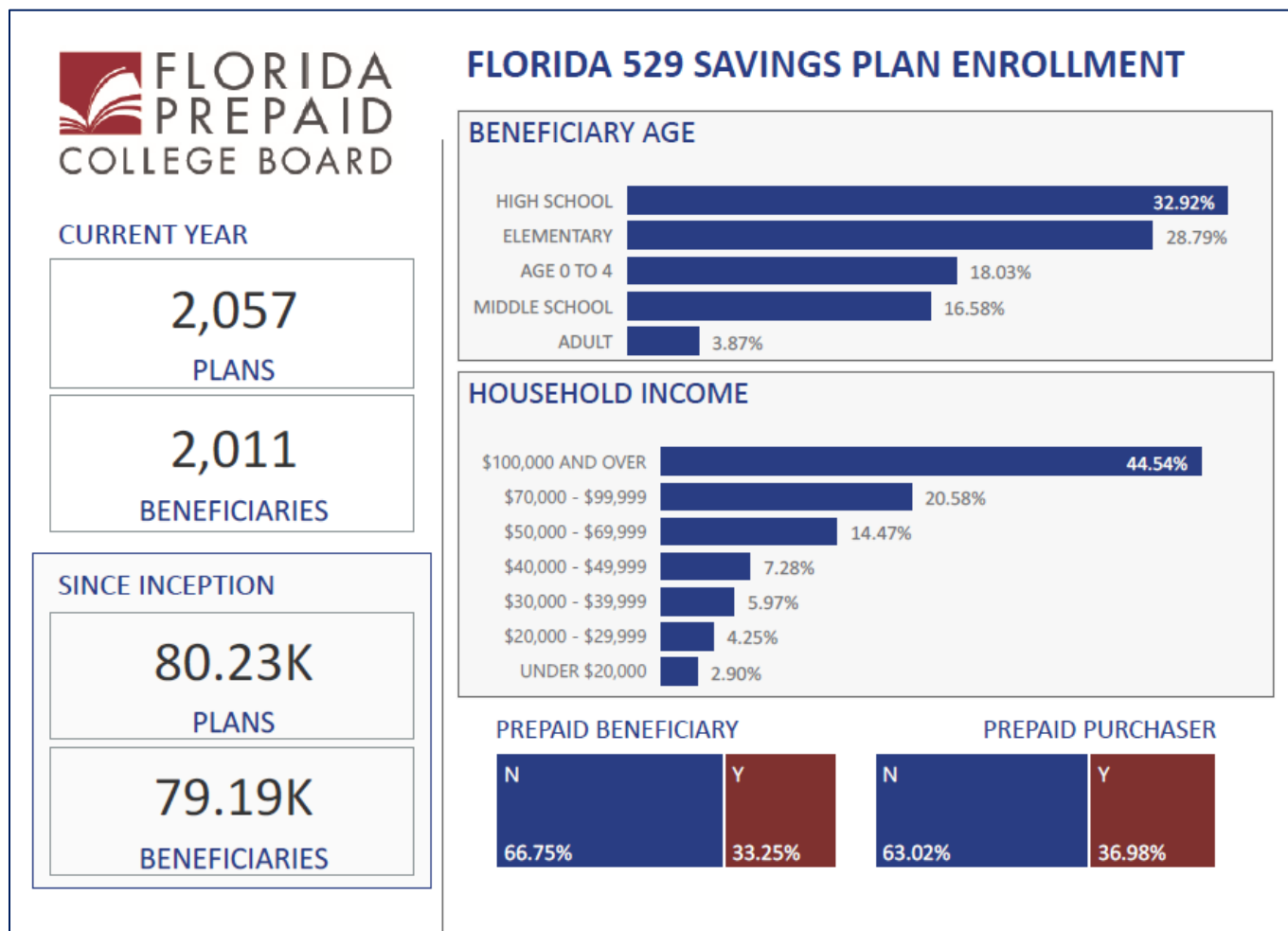
<https://www.myfloridaprepaid.com/wp-content/uploads/Savings-Plan-Guide.pdf>

Quick Start Guide:

<https://www.myfloridaprepaid.com/wp-content/uploads/Quick-Start-Guide.pdf>

APPENDIX E: SAVINGS DEMOGRAPHICS AND RESOURCES

APPENDIX E: SAVINGS DEMOGRAPHICS AND RESOURCES



Florida 529 Savings Program Resources / Links

Website:

<https://www.myfloridaprepaid.com/>

Annual Report:

<https://www.myfloridaprepaid.com/wp-content/uploads/2018-Florida-Prepaid-Board-Annual-Report.pdf>

Collateral:

<https://www.myfloridaprepaid.com/resources/forms/>

College Savings Guide:

<https://www.myfloridaprepaid.com/wp-content/uploads/Savings-Plan-Guide.pdf>

Quick Start Guide:

<https://www.myfloridaprepaid.com/wp-content/uploads/Quick-Start-Guide.pdf>

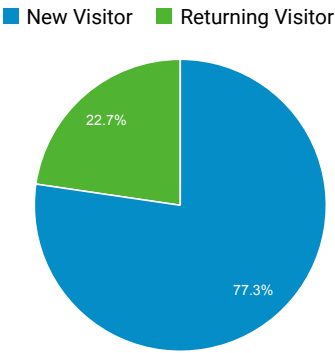
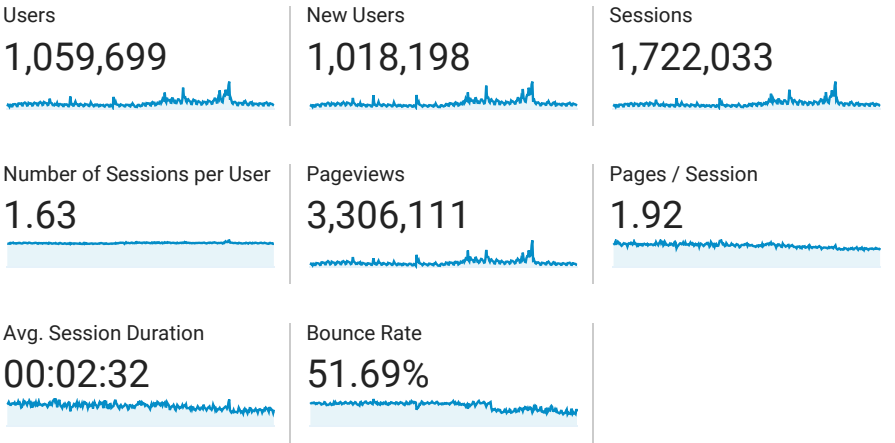
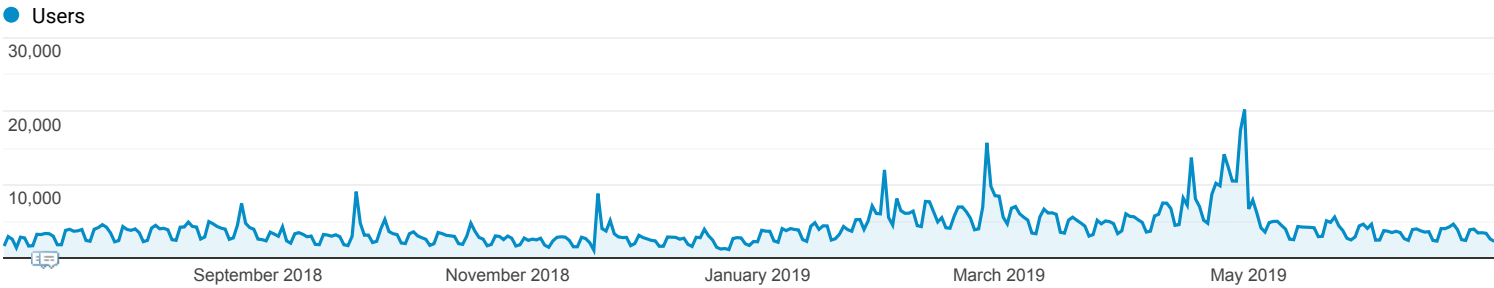
APPENDIX F: PREPAID/SAVINGS WEBSITE STATISTICS

Audience Overview

All Users
100.00% Users

Jul 1, 2018 - Jun 30, 2019

Overview



City	Users	% Users
1. Miami	92,448	7.86%
2. Orlando	87,055	7.40%
3. Tampa	58,983	5.02%
4. Jacksonville	36,825	3.13%
5. (not set)	31,554	2.68%
6. Atlanta	28,487	2.42%
7. Tallahassee	22,066	1.88%
8. Fort Lauderdale	15,077	1.28%
9. New York	12,839	1.09%
10. St. Petersburg	12,363	1.05%

APPENDIX G: PREPAID/SAVINGS MARKETING PLANS: FY 18/19 AND 19/20



FY 2017/2018 Campaign Performance
FY 2018/2019 Marketing Plan Executive Summary





FY 2017/2018

➤ Campaign Performance

FY17/18 Performance

➤ *Starting is Believing*

Marketing Objectives and Goals - March 1 – February 28

Goals	FY16/17	FY17/18	Goal	YOY Comparison / % of Goal
31,000 new Prepaid Plan beneficiaries	29,639	27,782	31,000	89.6% of goal; decrease of 6.3%
Total new Prepaid Plans	38,701	35,996	-	Decreased 7% YOY
10,000 new Florida 529 Savings Plan accounts	8,896	9,127	10,000	91.3% of goal; Increase of 2.6% YOY
Increase new visitors to marketing website during Open Enrollment by 10%	463,605	489,434	512,548	95.5% of goal; Increase of 5.6%
Increase total OE digital conversions by 20%	13,405	16,599	16,086	103.2% of goal; Increase of 23.8%
Increase email database by 10%	703,329	757,706	773,662	97.9% of goal; Increase of 7.73%
Engage in media relations efforts reflecting an added value of \$800,000	\$812,013	\$923,627	\$800,000	113.7% of goal; Increase of 13.7%
Grow social channels by 15%	Facebook 41,555 Likes; Twitter 1,531 Likes	Facebook 43,065 Likes (+1,510) Twitter 1,635 Likes (+104)	6,463	Overall 25% of goal; Increase of 3.7%; Facebook increase of 3.6%; Twitter increase of 6.8%

Increase in website traffic, with less overall conversions, follows the national trend that contributions into 529 plans has leveled off recently.

FY17/18 Performance

➤ *Starting is Believing*

Measurable High-Impact Initiatives*

33,734
plan sales
were
linked to
these
efforts via
promo
code or
tracking
pixel.

Paid digital efforts resulted in **16,599** enrollments, driving **45%** of sales

Blogger ambassadors drove over **5,000** promo codes; more than **13 %** of sales

Email marketing efforts continued to be highly successful, accounting for **18%** of sales

- **4,258 conversions** from 56 GovDelivery emails
- **2,438 conversions from** customer service prompt 1/new accounts emails

Department of Health direct mail captured 5.5% of sales

- Two direct mailings garnered **2,029** promo code redemptions

Scholarship Programs (Prepaid and Savings) account for 5.2% of sales

- **3,410** scholarship registrants converted into a 529 Plan

*Due to a single confirmation page, further analysis will be required to determine Prepaid vs. Savings plan sales, by channel

FY17/18 Performance

➤ *Starting is Believing*

Key Data Points

- Prepaid tuition sales in top 10 counties were down collectively 7.3%, while Savings Plans were down 4%
- Top 10 counties make up 2/3 of enrollments across the state
- Newborn and infant plans increased, 1.8% and 1.6%, Year Over Year.
- Families with Household Income of \$70-\$99K and \$100K+ saw slight increases in enrollment





FY 2018/2019 Marketing Plan

➤ Executive Summary

FY18/19 Executive Summary

Key Business Strategies

➤ *Starting is Believing*

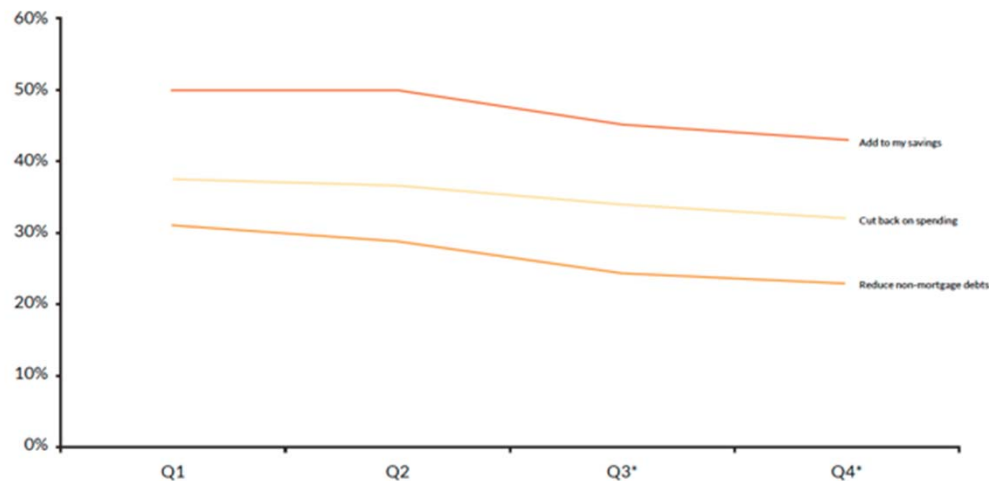
Shift Open Enrollment to February 1 – April 30

Across sources, there are key periods throughout the year that experience highs in consumer financial sentiment and/or saving trends

- Savings are highest in Q1 and Q2 – January holds a New Year's resolution mindset
- March and April are when consumers decide to get fiscally fit — most popular months to open an investment account
- Savings decline in Q3 and Q4 (fall and winter) in anticipation of holidays
 - Media is less expensive in Q1 and Q2; dollars will go farther

FIGURE 17: SAVING AND SPENDING HABITS OVERALL, Q1-Q4 2017

"Thinking about how you spend your money, which of the following do you plan to do in the next 3 months?"



BASE: 2,000 INTERNET USERS AGED 18+
SOURCE: LIGHTSPEEDINTEL

FY18/19 Executive Summary

Key Business Strategies

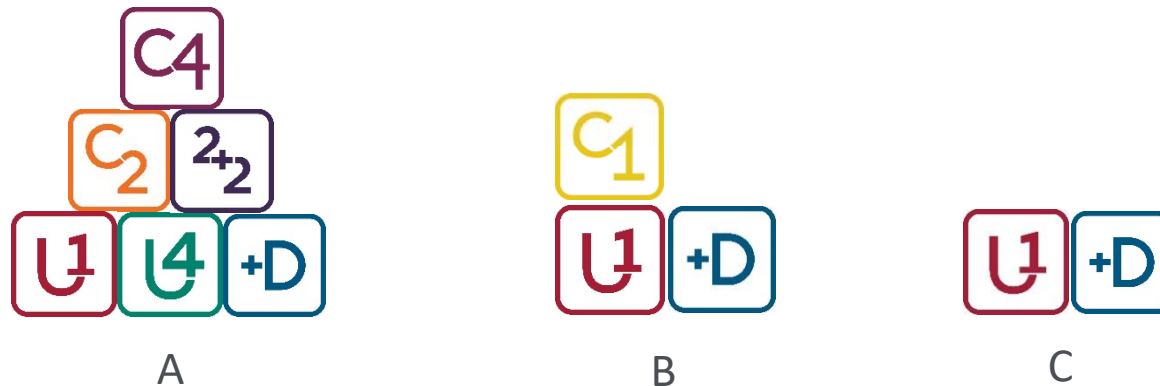
➤ *Starting is Believing*

Evaluate Product Offerings

#1 reason for incomplete applications—not confident that the right product is being selected and overwhelmed and/or confused by the choices.

Engage Qualtrix to test three product scenarios to determine which “menu” is most customer friendly

- Quantitative survey to 2,700 sample
- Understand the purchase choices, including barriers to purchase, in order to increase sales
- Identify best product mix that leads to most enrollments and years purchased



“...how am I gonna register for something if I don’t know exactly what it is first?”

“Overwhelmed by the options and not sure which one is right for me.”

FY18/19 Executive Summary

Key Business Strategies

➤ *Starting is Believing*

Conduct Year-Round Marketing Efforts

1

Back-to-School Program

7/16 – 9/2

Back to School Promotion

2

30th Anniversary Kick-off

9/20

Media Announcement:
30th Anniversary,
NEW OE 2/1 - 4/30
dates and all-NEW
scholarship program

9/24 - 10/28

'The Next Prepaid Kid'
Scholarship Contest

3

Holiday Gifting Effort

11/19 - 12/31

Promote eGift
option via owned
and earned
channels

4

Prepaid Plan Sales Promotion

1/8/19

Open Enrollment
Media Announcement:
February 1 OE start,
NEW product mix,
pricing

2/1 - 4/30

Open Enrollment

5

529 Savings Plan Promotion

5/1 - 5/28

529 Savings Plan
paid sales promotion

5/29 - 6/30

529 Savings Plan
Incentive Campaign

FY18/19 Executive Summary

➤ *Starting is Believing*

Business Objectives and Goals

Marketing Objectives

Enroll **31,000** new beneficiaries in Florida Prepaid College Plan

Reach **40,000** Florida Prepaid Plan sales

Open **10,000** new Florida 529 Savings Plans

Marketing Goals

- Increase new users to website by 10%
- Convert 15,000 sales via paid digital channels
- Double incomplete application enrollments, from 1,241 to 2,500 YOY
- Double Department of Health enrollments, from 2,727 to 5,500 YOY
- Increase email marketing conversions by 10%, from 6,696 to 7,360
- Media relations ad value a minimum of \$900,000
- Increase Hispanic audience impressions by 12%, from 83.7 million to 93.7 million
- Increase blogger ambassador campaign conversions by 8%



Paid / Owned / Earned Media

➤ Channel Enhancements

FY18/19 Executive Summary

➤ *Starting is Believing*

Paid Media Enhancements

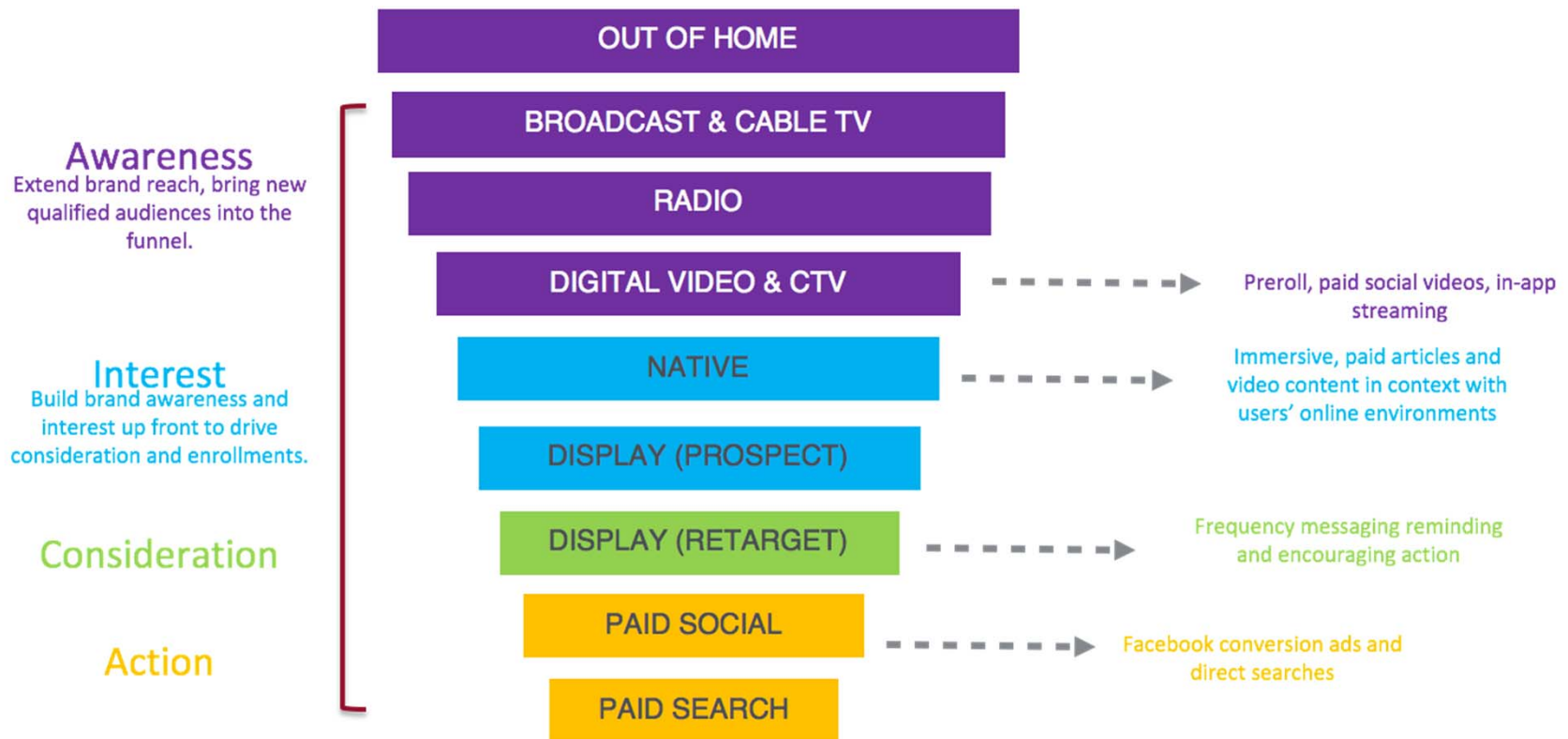
- Run :15s TV spots instead of :30s
- Employ digital attribution study to inform creative performance and eliminate waste
- Create a unique retargeting campaign for incomplete applicants based on their actions
- Pilot “offer” ads on Facebook
- Continue to enhance paid search prospecting campaigns



FY18/19 Executive Summary

➤ *Starting is Believing*

Paid Media Channel Strategy



FY18/19 Executive Summary

➤ *Starting is Believing*

Owned Channel Enhancements

- Optimize website experience
 - Streamline user experience from marketing site to CAP to eliminate barriers and increase conversions
 - Develop video content that simplifies product differentiation and benefits
 - Identify and develop new tools to educate consumers
- Nurture Department of Health newborn families through segmented direct mail and **email** communications
- Implement a new customer database solution and new email marketing platform to enhance customer communications
- Launch Instagram as new social media platform



FY18/19 Executive Summary

➤ *Starting is Believing*

Earned Media Enhancements

- Refocus partnerships away from sports and towards education (e.g. FDOE Teacher of the Year)
- Year round media pitching with focus on third party (customer) testimonials
- Elevate key blogger ambassadors to participate in webinars, media interviews and events
- Increase participation in events geared toward expectant mothers and families with young children (pregnancy expos and family fairs)
- Partner with the Florida Chamber of Commerce at “2018 Future of Florida Forum” to promote Florida Prepaid to CEOs and leaders of top employers in the state
- Host webinar for families of newborns





➤ FY18/19 Proposed Budget Allocation

FY18/19 Executive Summary

➤ *Starting is Believing*

Budget Allocation

Category	FY 2017/2018 Budget Approved	FY 2017/2018 Budget Actual*	FY 2018/2019 Budget Proposed
Professional Fees	\$958,657	\$958,657	\$958,657
PAID: Media Placements	\$4,250,000	\$3,963,642	\$4,250,000
Cable TV	\$1,200,000	\$1,108,110	\$1,135,000
Radio/NPR/Traffic/DJ	\$750,000	\$784,314	\$743,000
Digital	\$1,770,000	\$1,510,184	\$1,807,000
OOH	\$530,000	\$561,034	\$530,000
Contingency/Other	n/a	n/a	\$35,000
EARNED: PR & Outreach	\$800,000	\$746,331	\$800,000
OWNED:	\$755,000	\$525,797	\$755,000
CRM Salesforce License**	\$145,000	\$0	\$120,000
Production	\$210,000	\$299,197	\$295,000
Digital Tools/Production	\$145,000	\$136,371	\$200,000
Research & Measurement	\$75,000	\$30,241	\$80,000
Collateral & Promotions	\$175,000	\$54,988	\$55,000
Out-of-Pocket	\$5,000	\$5,000	\$5,000
Total	\$6,763,657	\$6,194,427	\$6,763,657

* Not final until 6/30

** Does not include implementation consulting which will be on a project basis



➤ Appendix

FY17/18 Performance

➤ *Starting is Believing*

Sales by County - Top 10 Markets

Florida Prepaid College Plans

County	Plans	% Change
Miami-Dade	5,093	-10.3%
Broward	4,371	-13.6%
Palm Beach	2,982	-8.7%
Hillsborough	2,344	-9.9%
Orange	1,931	-0.1%
Pinellas	1,272	-1.6%
Duval	1,209	-4.4%
Seminole	812	-1.5%
St. Johns	804	-6.6%
Brevard	766	-1.9%
Top 10 Total	21,584	-7.3%

Accounts for 72.9% of Plan Sales This Year

Florida 529 Savings Plan

County	Plans	% Change
Miami-Dade	1,123	.72%
Broward	1,029	-15.8%
Palm Beach	780	-2.4%
Hillsborough	752	-3.2%
Orange	618	9.6%
Duval	401	5.8%
Pinellas	378	-5.5%
Seminole	288	-8.3%
Brevard	254	-20.6%
St. Johns	239	14.4%
Top 10 Total	5,862	-4.5%

Accounts for 66% of New Accounts This Year

FY17/18 Performance

➤ *Starting is Believing*

Key Brand Statistics - March 1, 2017 – February 28, 2018

Florida Prepaid Plans - Tuition/Add-on	2016	2017	2018
Unique Tuition Plan Beneficiaries	29,260	29,640	27,782
New Accounts	37,723	38,701	35,996
Active Accounts	759,701	739,869	759,312
Statewide Penetration Rate	8.42%	8.11%	7.64%
Accounts purchased for the beneficiaries age 0-4	52%	50%	54%
Accounts purchased for the beneficiaries age 5-8	23%	23%	22%
Accounts purchased by grandparents	11%	11%	12%
Accounts purchased for Hispanic beneficiary (if provided)	23%	24%	24%
Accounts report a household income greater than \$70K (if provided)	68%	68%	68%
Florida 529 Savings	2016	2017	2018
New Accounts	8,010	8,896	9,127
Active Savings Plan accounts	51,107	60,178	68,984
Total Market Value	\$415,483,688	\$501,763,927	\$585,453,153
Average account balance	\$8,129	\$8,338	\$8,487
Average monthly contribution *	\$142	\$173	\$186
Actively contributing *	52%	51%	50%
Also Prepaid Plan account owners *	48%	45%	44%
Account owners are Florida residents *	92%	92%	93%

* Data as of March 31, 2016, 2017, and 2018 respectively.

FY18/19 Executive Summary

➤ *Starting is Believing*

Paid Media Channel Strategy

	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Cost
FPCB FY19 Media Plan													
Digital/Vinyl Bulletins									\$530,000				\$530,000.00
OOH Total Cost						\$530,000							\$530,000.00
TV								\$1,135,000					\$1,135,000.00
TV Total Cost						\$1,135,000							\$1,135,000.00
Radio								\$308,571		\$434,429			\$743,000.00
Radio Total Cost						\$743,000							\$743,000.00
Digital Display & Video - Open Enrollment								\$1,101,000					\$1,101,000.00
Digital Display 529 Savings										\$200,000			\$200,000.00
Saving for College - Annual													\$70,000.00
Paid Search - Annual													\$150,000.00
Paid Social - Back to School													\$75,000.00
Paid Social - 30th Anniversary													\$25,000.00
Paid Social - Open Enrollment													\$165,000.00
Paid Social - 529 Savings													\$21,000.00
Digital/Social Total Cost						\$1,807,000							\$1,807,000.00
Foundation Paid Social - Hispanic Heritage Month													\$2,000.00
Foundation Paid Social - Fall Scholarship													\$1,000.00
Foundation Paid Social - Black History Month													\$2,000.00
Foundation Paid Social Total Cost*						\$5,000							\$5,000.00
Contingency						\$35,000							\$35,000.00
Grand Total Cost						\$4,250,000							\$4,250,000.00

*Foundation costs are not included in the overall media budget

FY18/19 Executive Summary

➤ *Starting is Believing*

Earned Media Budget

	2017/2018 Budget Allocation	2018/2019 Budget Allocation	% Change	2018/ 2019 Key Activities	Changes
Advocacy	\$ 47,000	\$ 120,000	155%	District outreach through Superintendents and school administrators, and Florida Chamber	Addition of Corporate Outreach through Florida Chamber
Blogger Ambassadors	\$ 140,000	\$ 140,000	0%	Blogger outreach activities, Hispanic outreach, webinar	Blogger ambassadors will expand outreach to Prego Expos, etc.
Education Partners	\$ 182,364	\$ 208,333	14%	FDOE Teacher of the Year (Year 1), Education Foundations, ELC, Peachjar	-
Events	\$ 298,750	\$ 150,000	-50%	Pregnancy expos, financial planner outreach, Boosterthon	Discontinue partnerships with Miami HEAT, Orange Bowl, Florida State League
Blog / Webinar	\$ 50,000	\$ 47,320	-5%	Blog and webinar content creation	-
Other	\$ 81,886	\$ 134,347	64%	Retail engagement opportunity / miscellaneous	Eliminate All Pro Dad, Expand Moms Everyday, travel budget, miscellaneous
Total	\$ 800,000	\$ 800,000			



➤ *Starting is Believing*

FY18/19 Marketing Campaign Performance
FY19/20 Executive Summary Marketing Plan

Presented by: MOORE and SJ&P
September 26, 2019



FY18/19 Campaign Performance

➤ ***March 1, 2018 – April 30, 2019***

FY18/19 Campaign Performance

Business Objectives and Highlights

➤ *Starting is Believing*

Business Objective	FY17/18 Final	FY18/19 Final	YOY Increase
Enroll 31,000 new Prepaid Plan beneficiaries	27,846	30,280	+ 8.7%
Reach 40,000 Prepaid Plan sales	36,062	39,966	+ 10.8%
Open 10,000 new Florida 529 Savings Plans	8,833	10,101	+ 14.3%

March 1, 2017 – February 28, 2018 March 1, 2018 – April 30, 2019

- Pended season – 193% increase in applications
 - Prepaid pricing tool on website all year
 - Year-round Prepaid Plan marketing efforts
 - New promotions: Back-to-School & Cyber Monday
- Open Enrollment
 - Shifted to Q3 and shortened to three months
 - Significant website enhancements & animated videos
 - Additional emphasis in four Florida counties with most opportunity for growth

FY18/19 Campaign Performance

High-Impact Channels

➤ *Starting is Believing*

High-impact channel activity influenced 65% of total Prepaid and Savings Plan enrollments.

Channel	Enrollment
Paid digital tied to 71% of sales	21,456
Bloggers* drove nearly 10% of sales	3,590
Email marketing	4,854
Department of Health newborn outreach*: direct mail + email	1,796
Partnerships* (Superintendents, Ed Foundations, Florida Chamber, LEGOLAND® Florida)	659
Next Florida Prepaid Kid Scholarship Contest	220
Tracked via promo code* / pixel	32,575

* Promo code redemptions affected by February promotion (30th Anniversary) fully waived application fee.
There is potentially duplication across channels.

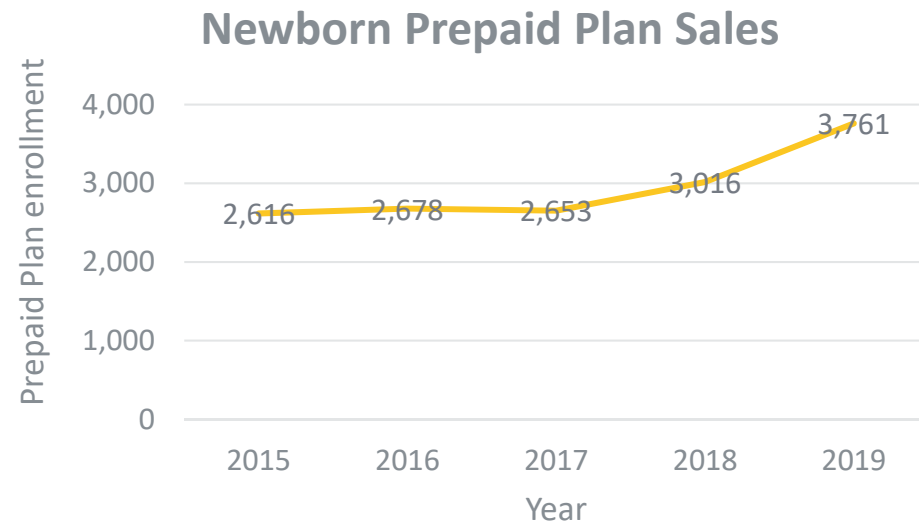
FY18/19 Campaign Performance

Newborn Family Outreach

➤ *Starting is Believing*

Highest newborn Prepaid Plan sales in last five years

- Increased 25% YOY



FY18/19 Campaign Performance

Sales by County

➤ *Starting is Believing*

Top 10 Markets

Florida Prepaid College Plans

County	Plans	% Change
Miami-Dade	5,400	8.5%
Broward	4,633	6.7%
Palm Beach	3,462	16.3%
Hillsborough	2,744	17.0%
Orange	2,120	7.7%
Pinellas	1,385	11.5%
Duval	1,287	9.1%
Seminole	909	10.3%
St. Johns	892	0.2%
Brevard	788	4.0%
Top 10 Total	23,620	9.8%

Accounts for 73.3% of Plan Sales This Year

Florida 529 Savings Plan

County	Plans	% Change
Broward	1,253	21.8%
Miami-Dade	1,226	9.2%
Palm Beach	927	18.8%
Hillsborough	881	17.2%
Orange	670	8.4%
Pinellas	482	27.5%
Duval	447	11.5%
Brevard	291	14.6%
Seminole	271	9.7%
St. Johns	251	5.0%
Top 10 Total	6,699	14.3%

Accounts for 66.3% of New Accounts This Year

Invested additional resources (partnerships, earned media, and paid campaign) in the four Florida counties that showed the most opportunity for growth based on market penetration and propensity to convert: Hillsborough, Orange, Pinellas, and Seminole, netting 12% growth in Prepaid Plans and 15% growth in Savings Plans.



➤ ***FY19/20 Executive Summary Marketing Plan***

Florida Prepaid College Savings Plans

Market Landscape

➤ *Starting is Believing*

Top 10 Markets	Prepaid Plans*	Savings Plans**	Unique Beneficiaries***	Population 0-18****	Median HH Income	Penetration Rate (Uniq Benes/0-18 Pop)
St. Johns	7,912	1,690	8,988	55,175	\$ 73,640	16.3%
Palm Beach	33,792	5,786	36,882	283,815	\$ 57,256	13.0%
Broward	47,909	7,741	52,020	413,667	\$ 54,895	12.6%
Seminole	9,375	1,986	10,646	98,245	\$ 60,739	10.8%
Miami-Dade	54,659	7,663	58,627	557,839	\$ 46,338	10.5%
Pinellas	14,118	2,688	15,707	157,995	\$ 48,968	9.9%
Hillsborough	25,677	5,274	28,838	323,300	\$ 53,742	8.9%
Brevard	8,270	1,848	9,474	108,627	\$ 51,536	8.7%
Orange	18,957	4,366	21,758	306,503	\$ 51,586	7.1%
Duval	11,061	2,372	12,621	214,741	\$ 51,296	5.9%

* Active/non-depleted tuition plans ages 0-18

** Active plans 0-18

*** Unique beneficiaries (Prepaid Plans and/or Savings Plan)

**** Based on 2018 U.S. census data

FY19/20 Marketing Plan

Business Objectives & Strategies

➤ *Starting is Believing*

OBJECTIVES

Enroll 31,000 new beneficiaries in a Prepaid Plan

Reach 40,000 Prepaid Plan sales

Open 10,000 new Florida 529 Savings Plans

STRATEGIES

Paid	Owned	Earned
Digital Out-of-Home (billboards)	Direct Mail	Media Relations
Broadcast/Cable TV	Collateral / Promotional Items	Family Outreach / Events
Radio	Animated Videos	Education Partners
Digital Video / Connected TV	Digital Production	Financial Planner Outreach
Digital Display	Website / Digital Tools	Business Community Outreach
Paid Social Media	Organic Social Media	Blog / Content Development
Paid Search	Email Marketing / CRM	Blogger Ambassadors

FY19/20 Marketing Plan

Paid Media Enhancements

➤ *Starting is Believing*



- Shift TV flight to the last month of Open Enrollment
- Utilize dynamic message retargeting display banners to sequentially message customer based on various triggers
- Leverage dynamic creative for pre-roll videos

Paid media budget increase: \$250,000

FY19/20 Marketing Plan

Paid Media Flowchart

➤ *Starting is Believing*

CHANNEL	BUDGET	JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN
Broadcast/Cable TV	\$ 1,125,288												
Radio/NPR/Traffic	\$ 660,712												
Digital	\$ 1,684,000												
Billboards	\$ 530,000												
Search	\$ 150,000												
Paid Social	\$ 350,000												
Total	\$ 4,500,000												

FY19/20 Marketing Plan

Owned Media Enhancements

➤ *Starting is Believing*

Transition to Mailchimp email platform

- Mobile-first design
- Personalized communications
- CRM-like integration

Full redesign of the Savings Plan section of the website

- How it Works, Investment Options, and Performance pages
- All-new interactive planning tool
- All-new animated video

Owned media budget decrease: \$250,000



FY19/20 Marketing Plan

Earned Media Enhancements

➤ *Starting is Believing*



- Media relations focused on regional data pitching and high-profile TV segments
- Expand network of superintendent partnerships to eight
- Elevate presence with FDOE to reach principals and superintendents
- Launch LEGOLAND® Florida partnership

FY19/20 Marketing Plan

LEGOLAND® Florida Partnership

➤ *Starting is Believing*



- First year-round retail partnership with full park integration
 - 1 million Florida resident visitors annually
 - 60% of children are 8 years and younger
- Partner with LEGOLAND® Florida for Florida Prepaid Scholarship Program
- Florida Prepaid Schoolhouse opening November 2019
 - Prime park location attracts children 0-5
 - School / career themed interactions
 - Playground equipment/charging station

FY19/20 Marketing Plan

Partnerships

➤ *Starting is Believing*

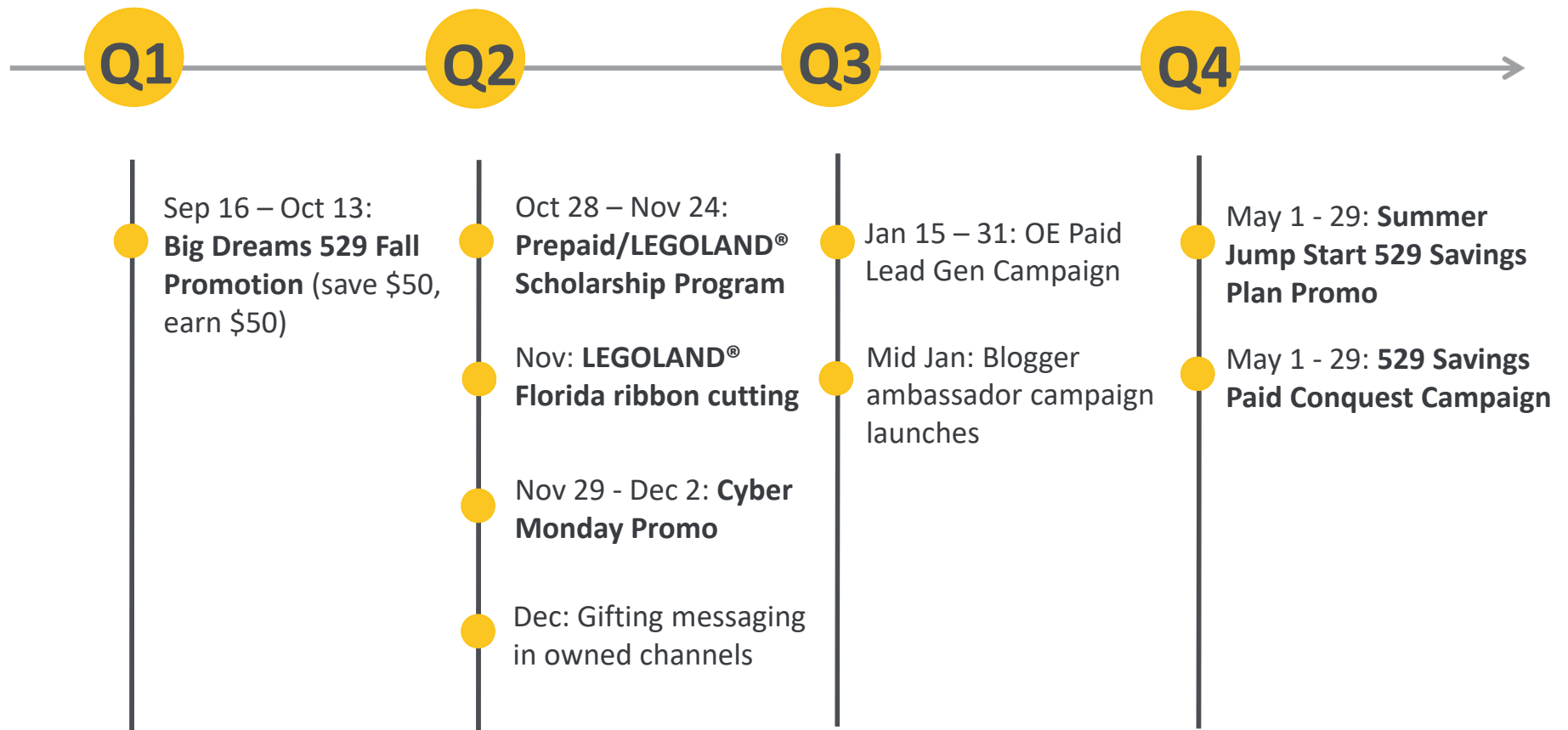


- Association of Early Learning Coalitions
- Florida Department of Education Teacher of the Year
- Florida Chamber of Commerce
- LEGOLAND® Florida
- Orlando Science Center
- School District Superintendents (eight scholarships)

FY19/20 Marketing Plan

Special Promotions

➤ *Starting is Believing*



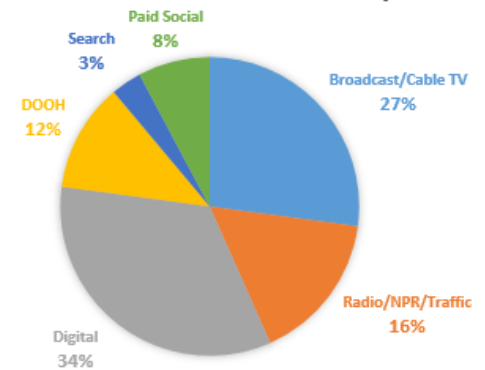
FY19/20 Marketing Plan

Marketing Plan Budget Allocation

➤ *Starting is Believing*

Category	FY18/19 Planned	FY18/19 Actual	FY19/20 Proposed
Professional Fees	\$958,657	\$958,657	\$958,657
PAID: Media Placements	\$4,250,000	\$4,224,773	\$4,500,000
Broadcast/Cable TV	\$1,135,000	\$1,058,466	\$1,220,288
Radio/NPR/Traffic	\$743,000	\$779,104	\$730,712
Digital	\$1,381,500	\$1,426,268	\$1,519,000
DOOH/Billboards	\$530,000	\$528,105	\$530,000
Search	\$150,000	\$150,286	\$150,000
Paid Social	\$275,500	\$282,544	\$350,000
OE Contingency	\$35,000	\$0	\$0
OWNED	\$755,000	\$740,737	\$505,000
EARNED: PR & Partnerships	\$800,000	\$725,504	\$800,000
TOTAL	\$6,763,657	\$6,649,671	\$6,763,657

PAID MEDIA ALLOCATION 19/20





➤ *Appendix*

FY19/20 Marketing Plan

Owned Media Budget Allocation

➤ *Starting is Believing*

Category	FY18/19 Planned	FY18/19 Actual	FY19/20 Proposed	Details
CRM/MailChimp + API Integration	\$120,000	\$0	\$100,000	Transition email platform from GovDelivery to Mailchimp
Production	\$295,000	\$407,019	\$175,000	Paid, direct mail, social, animated video
Digital Production	\$200,000	\$180,210	\$150,000	529 Savings Plan enhancements, interactive tool
Research & Measurement	\$80,000	\$47,560	\$0	Currently have \$32K credit with Qualtrix
Collateral and Promotions	\$55,000	\$104,973	\$55,000	Raintree, kitting and shipping, printing and production
Misc. / Out-of-Pocket	\$5,000	\$975	\$25,000	Miscellaneous / contingency
TOTAL	\$755,000	\$740,737	\$505,000	

FY19/20 Marketing Plan

Earned Media Budget Allocation

➤ *Starting is Believing*

Category	FY18/19 Planned	FY18/19 Actual	FY19/20 Proposed	Details
Media Relations & Advocacy	\$55,000	\$47,000	\$88,500	Florida Chamber, Superintendents, TV media tour
Blogger Ambassadors	\$140,000	\$127,107	\$130,000	15-20 bloggers for pended season and OE campaigns
Education Partners	\$208,333	\$217,833	\$156,333	FDOE, ELC, CFEF, Peachjar
Family Outreach & Events	\$235,000	\$194,883	\$221,000	LEGOLAND® Florida, Baby and family expos, Orlando Science Center, FPAs, Hispanic outreach, other events
Blog/Content Development	\$22,320	\$22,320	\$35,000	College? Definitely! Blog; LEGOLAND® Florida and Orlando Science Center content development
Support/Other	\$139,347	\$116,361	\$169,167	Collateral, travel & shipping, media monitoring, account contributions, miscellaneous
TOTAL	\$800,000	\$725,504	\$800,000	

FY19/20 Marketing Plan

Marketing Goals

➤ *Starting is Believing*

Goals	Strategies
Increase website conversion rate by 5%	<ul style="list-style-type: none"> Utilize dynamic message retargeting display banners
Convert 22,000 sales via paid digital channels	<ul style="list-style-type: none"> Increase and front-load pre-roll and connected TV spend Leverage dynamic creative pre-roll video Shift TV flight to last month of Open Enrollment
Convert 2,000 incomplete applicants	<ul style="list-style-type: none"> Retarget with digital display, paid social, and personalized email communications
Convert 2,000 Department of Health families	<ul style="list-style-type: none"> Dynamically retarget families that visit site after receiving email / direct mail communications
5,000 new plans from email marketing	<ul style="list-style-type: none"> Mobile-first and personalized emails using new Mailchimp platform
Secure 30 feature media placements across TV, radio, and print with measured ad value	<ul style="list-style-type: none"> In-studio TV tour; shift to quality over quantity strategy through specialized pitching Provide new media angles that leverage existing sales data to identify regional trends
Secure a minimum of 4,000 blogger ambassador promo codes	<ul style="list-style-type: none"> Add new blogger ambassadors to bring in new audiences Elevate select high-performing bloggers to ambassador status
Secure a minimum of 1,000 partnership promo code redemptions	<ul style="list-style-type: none"> Increase number of school district partnerships, focusing on principal engagement Launch LEGOLAND® Florida partnership and Schoolhouse Pilot children's museum partnership in Orlando

FY18/19 Campaign Performance

Marketing Plan Goals Performance

➤ *Starting is Believing*

Goals	FY17/18	FY18/19	YOY Comparison/% of Goal
Increase new users to website by 10%	907,043	1,095,187	21%
Convert 15,000 sales via paid digital channels	16,599	21,456	29%
Double incomplete app enrollments	1,241	2,033	64%
Double Department of Health direct mail and email** enrollments *	2,727	1,796	-34%
Increase email marketing conversions by 10%	6,696	4,854	-28%
Media relations ad value of \$900,000	\$923,627	\$2,296,144	149%
Increase Hispanic audience impressions by 12% ***	83,700,000	40,600,000	-51%
Increase blogger ambassador campaign conversions by 8% *	5,034	3,950	-22%

* Promo code usage in 18/19 affected by February waived app fee for 30th anniversary promotion

** Only permitted to send 2 emails during FY 18/19

*** Estimated impressions; does not include reach across all channels; shift in blogger strategy also impacted the 18/19 estimate

FY18/19 Campaign Performance

Key Brand Statistics

➤ *Starting is Believing*

Key Brand Statistics

Florida Prepaid Plans - Tuition/Add-on	CY 2017	CY 2018	CY 2019
Unique Tuition Plan Beneficiaries	29,640	27,782	30,280
New Accounts	38,701	35,996	39,966
Active Accounts	739,869	759,312	741,025
Statewide Penetration Rate	8.11%	7.64%	7.93%
Accounts purchased for the beneficiaries age 0-4	50%	54%	55%
Accounts purchased for the beneficiaries age 5-8	23%	22%	21%
Accounts purchased by grandparents	11%	12%	11%
Accounts purchased for Hispanic beneficiary (if provided)	24%	24%	24%
Accounts report a household income greater than \$70K (if provided)	68%	68%	71%
Florida 529 Savings	FY 2017	FY 2018	FY 2019
New Accounts	8,996	9,532	8,832
Active Savings Plan accounts	62,802	72,063	80,481
Total Market Value	\$527,815,511	\$602,307,666	\$677,917,644
Average account balance	\$9,071	\$8,358	\$8,423
Average monthly contribution	\$150	\$155	\$141
Actively contributing	50%	50%	49%
Also Prepaid Plan account owners	44%	43%	42%
Account owners are Florida residents	92%	93%	93%

- CY 2017 and 2018 are from March 1 – February 28.
- CY 2019 was from March 1, 2018 – April 30, 2019.
- FY July 1 – June 30

APPENDIX H: PREPAID ENROLLMENT SNAPSHOT: FY 18/19



2018-2019 ENROLLMENT SNAPSHOT

April 30, 2019

Enrollment Period*
(through April 30)

2017-2018

2018-2019

A. Florida Prepaid Plans

Florida Prepaid College Plan (see sales by type below)	29,652	32,210
Local Fee Plan	232	149
TDF Plan	158	108
Dormitory Plan	6,020	7,499
Total Plan Sales	36,062	39,966
Unique Tuition Plan Beneficiaries	27,846	30,280

B. Florida 529 Savings Plans

8,833

10,101

C. Marketing Website*

Average Daily Visits	6,019	7,580
% New Visits	76.90%	76.10%

D. Average Daily Telephone Volume (Sales)

242

267

E. Florida Prepaid College Plan Sales by Type

4-Year Florida University Plan	15,050 (51%)	16,668 (52%)
1-Year Florida University Plan	5,541 (18%)	5,873 (18%)
2 + 2 Florida Plan	3,571 (12%)	3,649 (11%)
4-Year Florida College Plan	2,016 (7%)	2,323 (7%)
2-Year Florida College Plan	3,474 (12%)	3,697 (12%)
	29,652	32,210

*The 2017-18 enrollment year ran from March 1, 2017 through February 28, 2018. The 2018-2019 enrollment year ran from March 1, 2018 through April 30, 2019.

APPENDIX I: FOUNDATION STATISTICS AND RESOURCES

APPENDIX I: FOUNDATION STATISTICS AND RESOURCES



CONTRACT YEAR

2019

1,392

PLANS

33

BENEFICIARIES

58

DONORS

FLORIDA PREPAID COLLEGE FOUNDATION PLAN SUMMARY

TUITION PLANS

PLAN TYPE	PLAN COUNT	% OF SALES
2-YEAR COLLEGE	855	63.19%
4-YEAR COLLEGE	214	15.82%
4-YEAR UNIVERSITY	170	12.56%
2 + 2	73	5.40%
1-YEAR UNIVERSITY	41	3.03%
Total	1,353	100.00%

ADD-ON PLANS

PRODUCT	PLAN COUNT	% OF SALES
DORM	39	100.00%
Total	39	100.00%

Florida Prepaid College Foundation Resources / Links

Website:

<https://www.floridaprepaidcollegefoundation.com/>

Annual Report:

<https://www.floridaprepaidcollegefoundation.com/wp-content/uploads/2019/06/DIGITAL-2018-Florida-Prepaid-College-Foundation-Annual-Report.pdf>

APPENDIX J: ABLE RESOURCES

APPENDIX J: ABLE RESOURCES

ABLE United Resources / Links

Website:

<https://www.ableunited.com/>

Annual Report:

https://www.ableunited.com/wp-content/uploads/2018-ABLE_United-Annual-Report_FINAL-WEB-as-of-3.28.19.pdf

Collateral:

<https://www.ableunited.com/resources/forms-and-publications/>

English Quick Start Guide:

<https://3chhd9rjja71q885b10gi37k-wpengine.netdna-ssl.com/wp-content/uploads/ABLE-Quick-Start-Guide.pdf>

English Flyer:

<https://3chhd9rjja71q885b10gi37k-wpengine.netdna-ssl.com/wp-content/uploads/ABLE-50386-RackCard-Sunday-web.pdf>

APPENDIX K: ABLE KEY STATISTICS: Q1-Q2 2019



ABLE United Key Statistics

Statistics	Q2 – 2019	Q1 – 2019
Enrollments	396	238
Average Age	31	31
Eligibility	42% SSI	42% SSI
Average Account Balance All	\$5,040	\$4,593
How Invested	51% conservative	51% conservative
Contributions	\$2,127,898 (1,335 accts)	\$2,152,281 (1,237 accts)
Withdrawals	\$521,595 (281 accts)	\$523,583 (277 accts)
Phone Calls	555	1,031
Unique Website Visitors	19,794	14,977

National vs. Florida

Statistics	National	Florida
Number of Programs	42	1
Number of ABLE Accounts*	45,928	3,197
Increase from Previous Quarter	5,506 (14%)	515 (19%)
Average Account Balance	\$5,657	\$5,704
Increase from Previous Quarter	\$120 (2%)	\$410 (8%)

Customer Statistics

Beneficiary Relationship	Percent
Guardian	56%
Power of Attorney	9%
Self	35%

Basis of Eligibility	Percent
SSDI Title II	24%
SSI Title XVI	43%
Other	33%

Disability Type	Percent
1. Developmental Disorder	43%
2. Intellectual Disability	24%
3. Psychiatric Disorder	8%
4. Nervous Disorder	8%
5. Congenital Anomalies	8%
6. Respiratory Disorder	0%
7. Other	9%

State of Residency	Percent
Florida	98.3%
Other State	1.7%

Website Activity

	Description	Q2 – 2019	Q1 – 2019
Evaluation	Programs available to Floridians	26	26
	New website visitors	19,749	14,977
Decision	Sought beyond landing page	9,788 (49%)	7,656 (51%)
	Likely eligible*	2,948 (30%)	1,962 ² (26%)
Purchases by Eligible	Clicked on enrollment	2,013 (68%)	760 ² (39%)
	Started application	659 (33%)	447 (59%)
	Completed Application	396 (60%)	238 (53%)
Post-Purchase	Contribution to new account	369 (93%)	205 (86%)

10% increase in the number of individuals who started the application and contributed

Optional Information – How did you hear about us?

Options	Q2 – 2019	Change	Q1 – 2019
Advocacy or Community Organization	40%	8%	32%
Legal Professional	14%	-4%	18%
Other (Event, School, Work, etc.)	13%	7%	6%
Media - Digital/Print	9%	2%	7%
Service Provider	7%	-3%	10%
Friend/Family	7%	-	7%
Financial Advisor	5%	-8%	13%
Website	5%	-2%	7%
Number of Responses	43		140

Previously, the survey was part of the application process. Now, the survey is part of the enrollment confirmation screen and confirmation email. This change has resulted in a significant drop in the number of individuals completing the optional survey from 75% to 10% of those who enroll.

Designated Market Area (DMA)*


Description	Total Enrollment	Total Penetration	Q2 2019	Q2 Penetration Rate	Q1 2019	Q1 Penetration Rate
Tampa - St. Petersburg - Sarasota	894	1.90%	84	0.18%	61	0.13%
Orlando - Daytona - Melbourne	808	2.06%	130	0.33%	50	0.13%
Miami - Ft. Lauderdale	420	0.88%	48	0.10%	25	0.05%
Jacksonville	352	1.87%	38	0.20%	17	0.09%
West Palm Beach - Ft. Pierce	262	1.17%	29	0.13%	20	0.09%
Tallahassee	186	3.75%	21	0.42%	19	0.40%
Ft. Myers - Naples	134	0.99%	17	0.13%	9	0.07%
Pensacola	111	1.47%	10	0.13%	9	0.12%
Gainesville	100	2.96%	12	0.35%	20	0.59%
Panama City	68	1.71%	5	0.13%	3	0.08%
TOTAL	3,335	1.60%	394		233	

Assumes that 1% of Floridians are eligible and have the necessary resources to open and maintain an account

* Does not include accounts who no longer reside in Florida

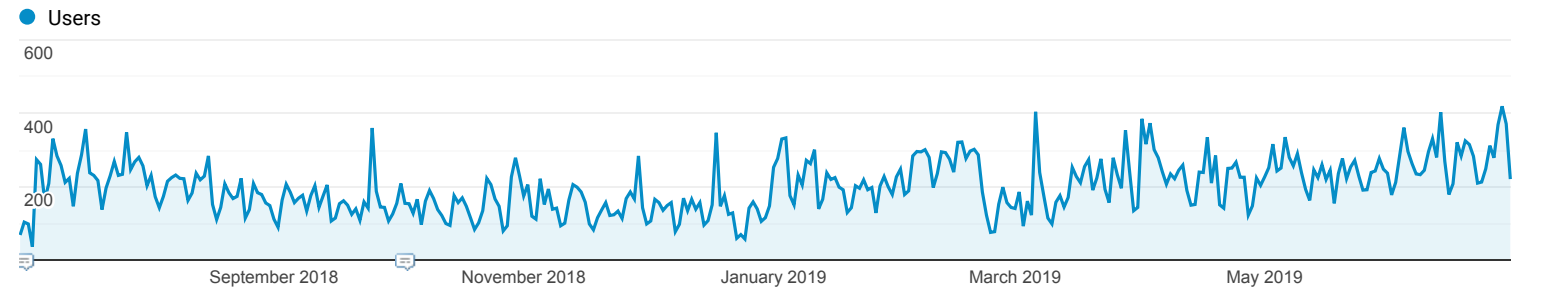
APPENDIX L: ABLE WEBSITE STATISTICS

Audience Overview

 All Users
100.00% Users

Jul 1, 2018 - Jun 30, 2019

Overview



Users

53,837

New Users

52,323

Sessions

83,004

Number of Sessions per User

1.54

Pageviews

155,021

Pages / Session

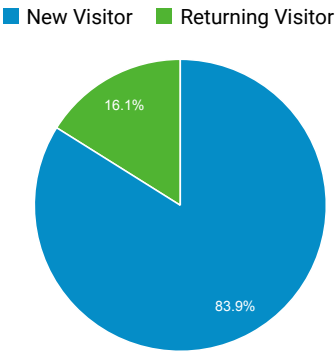
1.87

Avg. Session Duration

00:01:46

Bounce Rate

56.55%



City	Users	% Users
1. Orlando	4,944	8.71%
2. Miami	3,296	5.81%
3. (not set)	2,640	4.65%
4. Tampa	2,572	4.53%
5. Jacksonville	2,135	3.76%
6. Tallahassee	1,106	1.95%
7. Atlanta	931	1.64%
8. New York	795	1.40%
9. Gainesville	661	1.16%
10. St. Petersburg	547	0.96%

APPENDIX M: ABLE MARKETING PLANS: FY 18/19 AND 19/20

Marketing Plan

FY 2017/2018 Q1 – Q3 Campaign Recap

FY 2018/2019 Executive Summary

June 25, 2018



FY17/18 Brand Objectives and Goals

Data as of March 31, 2018

Objective	Goal	Result	% to Goal
New Accounts	2,000	826	41.3%


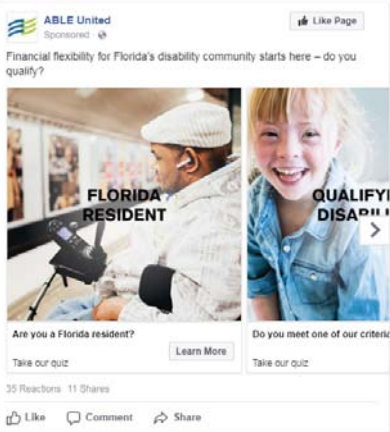

	Goal	Result	% to Goal
Earned media ad value	\$ 170,000	\$105,000	61.8%
Retention rate after 1 year	90%	98%	108.9%
Average account balance	\$ 2,500	\$4,146	165%
Customer satisfaction	90%	90%	100%
Followers/Engagement on Facebook	2,500/ 2.5%	975/ 5%	39%/ 200%
New website visitors	30,000	67,254	224%
Advocacy groups engaged	280	290	103%

FY17/18 Q1-Q3 Activity by Channel

	PAID	OWNED	EARNED
BUDGET*	\$307,338	\$88,622	\$77,013
ACTIVITIES	Google Search (36,663 clicks/155 enrollments)	Website (67K new visits, up 53% from Q2)	Media Relations (15 hits, \$105K ad value)
	FB Lead Gen Ads (811 emails collected)	Eligibility Wizard Completions (unique) 15,021 (4,000 = yes)	8 Webinars (664 registrants, 278 participants)
	Digital Display (16M impressions, 6,100 clicks, 114 enrollments)	Email subscribers increased 114.6% (2,750 to 5,902)	4 brand ambassadors (attended 19 events statewide)
	Paid Social (8.8M impressions, 26.5K clicks, 130 enrollments)	Email Campaigns (31 emails, 85 enrollments)	11 partners (more than 115K reached via email databases)
	Video campaign (3M impressions, 11.2K clicks, 77% VCR)	Facebook (96K reached, 168 posts, doubled engagement rate 2.5 to 5%)	43 events w/ 40,000 attendees (Family Café 30 enrollments)
TOTAL IMPRESSIONS	28,650,000	203,265 68,850/web+ 88,522/social + 45,793/email	16,711,000
CONVERSIONS**	399	85	74
TOTAL CONVERSIONS	826		
CPA	\$1,098		

FY17/18 Key Initiatives

Paid Media

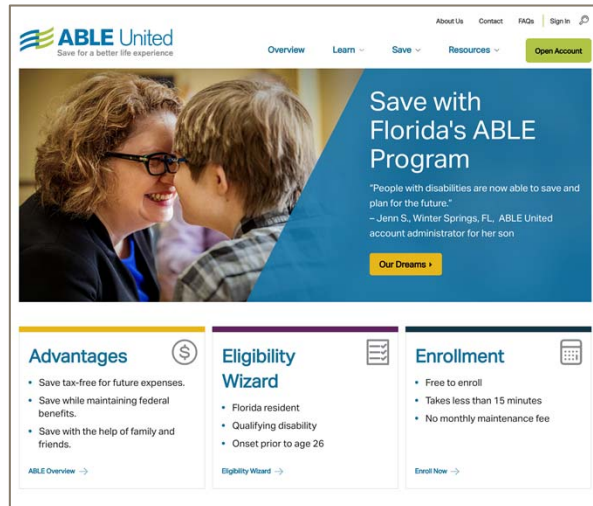
Top Performers		
Digital Display - “You Can’t”	Facebook - “Eligibility” Carousel	Lead Generation - ABLE Lead Gen
		

Paid campaign has picked up momentum throughout the year

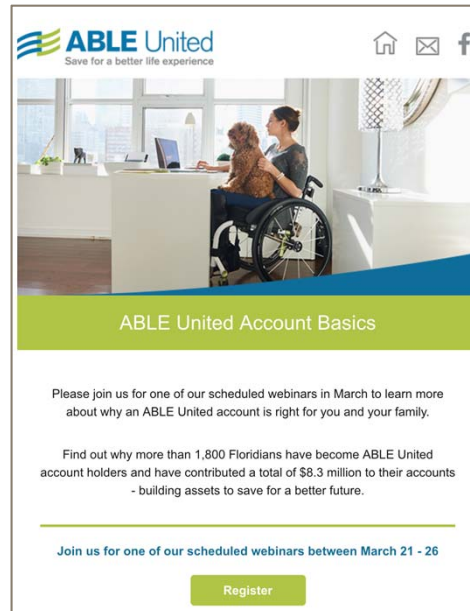
- Total enrollments via paid media channels = **399 (48.3%)**
- Page Likes increased from **115 to 828 (713)**
- Social Leads increased from **376 to 811 (435)**

FY17/18 Key Initiatives

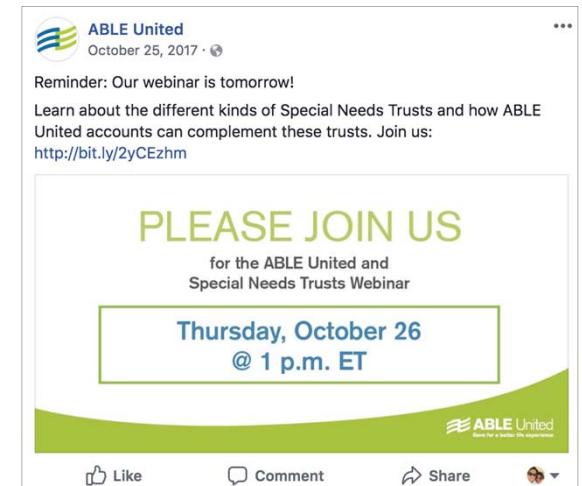
Owned Media



Website traffic from all channels is up **65%** year over year - paid search and direct sources are in the lead.



31 emails have driven
85 enrollments (10%)
Subscriber database **increased 114.6%** (from 2,750 to 5,902)



*This post was shared by ABLÉ National Resource Center



Facebook engagement rate has doubled year over year, from **2.5% to 5%**

FY17/18 Key Initiatives

Earned Media

The Family Café and its Planning Committee are hard at work planning a fantastic event that is sure to engage you and your family, while providing you with useful information and access to all manner of resources. We hope you can join us this June in Orlando for another serving of Collaboration, Advocacy, Friendship and Empowerment!

Some sessions and activities at The 20th Anniversary Family Café may be photographed or videotaped. By participating in The 20th Anniversary Family Café, registrants agree that The Family Café has the right to use their image, likeness, and/or voice or sound recording taken in connection to The 20th Anniversary Family Café in all Media.

A free and easy way to start saving – today!

The Family Café is proud to partner with ABLE United – Florida's qualified ABLE program. Their mission is to help people like you and your loved ones save money to cover costs that support health, independence, and quality of life without negatively impacting federal benefits like Supplemental Security Income and Medicaid. Simply put, they believe in an opportunity for A Better Life Experience.

Now that you've signed up for The 20th Anniversary Family Café, take the next step to start saving today, and open your ABLE United account! Enrollment is free and there is no minimum to contribute.

As a member of The Family Café family, we've got a special offer for you:

- Sign up for your ABLE United account at ableunited.com
- During the enrollment process, use the promo code **"FAMILYCAFET18"** and receive a free gift.

And, when you sign up, you're not only saving for the future, but you're benefiting The Family Café, too. For each use of our promo code upon opening an account, we receive a donation from ABLE United, which allows us to better serve you!

For more information or to open an account online, go to www.ableunited.com and use the special promo code: **"FAMILYCAFET18"**




PLEASE JOIN US FOR A WEBINAR TO LEARN MORE ABOUT

Opening and Managing an ABLE United Account

This is a follow-up to the webinar provided to Waiver Support Coordinators and Supported Living Coaches in December 2017, but is also appropriate for individuals who did not attend that webinar.

Join us to learn more about how to help the people you serve open, manage and use an ABLE United account.

This webinar has been approved for a one-hour credit towards in-service training.

JOIN US ON
THURSDAY, MARCH 15TH
12 - 1:15 P.M. EST

To RSVP, please [CLICK HERE](#)

Engaged Family Café audience during pre-registration with ABLE United conversion offer embedded in the process

- Resulted in **30** conversions utilizing promo codes and **505** UTM code click-throughs

Developed ABLE United Brand Ambassador Program

- Trained **four** brand ambassadors
- Collectively they participated in **19** events and achieved **11** trackable conversions

Engaged database of Agency for Persons with Disabilities list of Waiver Support Coordinators/Supported Life Coaches

- Hosted **two** webinars (qualified as in-service training)
- Resulted in **790** webinar registrants and **485** webinar attendees



FY18/19 Brand Objectives and Goals

BUSINESS OBJECTIVES

- Enroll **1,350** new accounts
- Preserve a **90%+** retention rate after one year
- Maintain an average account balance of **\$3,000**

MARKETING GOALS

- Increase new website users by **10%**
- Convert **35%** of sales from paid digital channels
- Enroll **500** people from ADP direct mail and email marketing outreach
 - Garner **\$150,000** in earned media value
 - Engage **300** advocacy groups

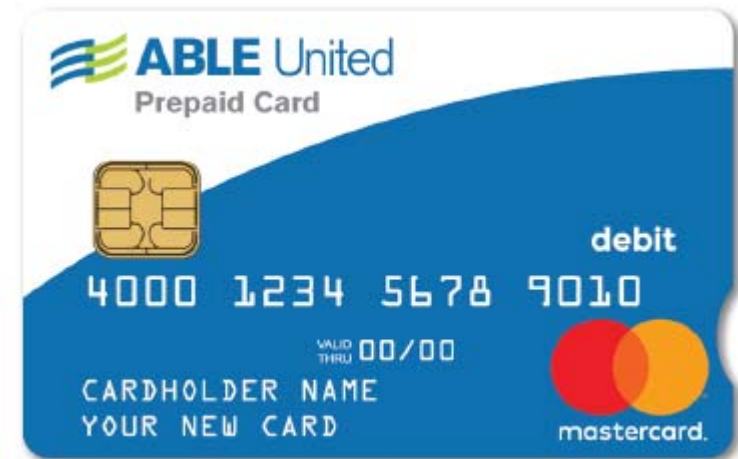
FY18/19 Program Enhancements

After the Records Administration transition in fall, all channels will focus to inform current and prospective account holders of the new features:

- Prepaid card
- FDIC savings option
- Enhanced gifting portal

As well as re-emphasize these features:

- Waiver of Medicaid repayment clause
- Low Cost / no monthly account fee



FY18/19 Paid Media Enhancements

Refine the existing paid strategy with the following recommendations:

- Refresh video content and continue use for prospecting
- Enhance digital and paid social media campaigns
 - Retarget prospects who complete specific actions with unique messaging across all channels (e.g. successfully complete eligibility wizard)
 - Pilot a reach campaign
- Enhance existing search strategy with revised text ads to improve ad relevance
- Explore weighting the media more heavily in Q3 and Q4 based on seasonality

FY18/19 Owned Media Enhancements

- Website updates
 - Records administration conversion
 - New website page that allows users to access forms
 - New website page that encompasses Prepaid card sign-up and usage details
 - Investment website page being updated to include FDIC option
 - Additional website “tuning”
 - Streamline email subscriber collection
 - Update navigation structure on mobile
- Improve ADP direct mail campaign based on 17/18 results
- Email marketing will focus on program enhancements
 - Quarterly newsletter
 - Outreach to Prepaid Plan database

FY18/19 Earned Media Enhancements

Advocacy

- Expand Tier 1 partnerships
- Expand partner bonus program
- Communicate with financial and legal professionals regarding key program improvements; expand engagement with champions
- Develop strategy to engage exceptional education and student services (ESE) programs

Public Relations

- Expand ambassador program to increase presence across state
- Identify *enrollment event* opportunities to be staffed by brand ambassadors
- Educate current and potential customers on program enhancements through webinars, special events and other resources

Media Relations

- Develop quarterly media campaigns
- Focus on program enhancements and customer testimonials



FY18/19 Budget

Category	FY 2015/16 Actual	FY 2016/17 Actual	FY 2017/2018 Projected	FY2018/2019 Budget Proposed
Professional Fees	\$327,150	\$479,686	\$575,000	\$444,000
PAID: Media Placements	\$60	\$299,035	\$537,580	\$380,000
EARNED: PR & Partnerships	\$142,659	\$83,806	\$177,841	\$94,000
OWNED	\$472,512	\$187,939	\$158,780	\$113,200
Contingency	\$1,038	\$109	\$1,500	\$0
Total	\$943,419	\$1,050,575	\$1,450,701	\$1,031,200
Enrollment		1,056	1,250	1,350*
Cost Per Enrollment	Start Up	\$995	\$1,161	\$764

2017/2018 Approved budget was \$1.9 million



Budget Recommendations 18/19

Paid Media

Item	Budget Estimate	Details
Digital Video & Connected TV	\$80,000	36 Weeks - Prospecting 80% / Retargeting 20%
Digital Display	\$140,000	36 Weeks - Prospecting 80% / Retargeting 20%
Paid Social	\$80,000	Annual, state-wide coverage
Google Adwords / Search	\$80,000	Annual, state-wide coverage that includes key search terms and Adword efforts
TOTAL	\$380,000	

Paid Media Placements and Campaign Flighting

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Budget Recommendations 18/19

Owned Media

Item	Budget Estimate	Details
Research	\$0	Conducting every other year
APD Outreach	\$50,000	DM (2) and Email Nurture Sequence
Email Marketing	\$1,200	MailChimp subscription service; campaign oversight within fee
Content/Video Production	\$30,000	Refresh creative 1x annually
Digital Tools/Website Development	\$0	Project basis as needed
Website Management	\$0	15 hrs./month included in fee
Collateral and Promotions	\$25,000	Production, fulfilment and storage
Social Media (content/community management)	\$5,000	Annual content production costs (video, GIFs, etc.). 104 posts annually
Out-of-Pocket Expenses	\$2,000	Misc. expenses
TOTAL	\$113,200	

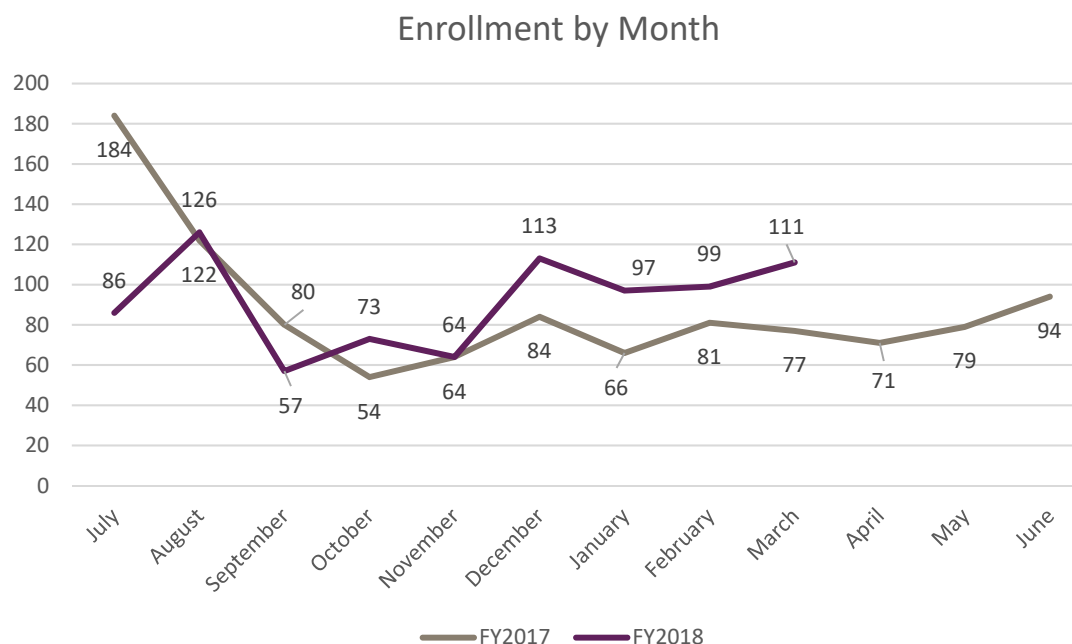
Budget Recommendations 18/19

Earned Media

Item	Budget Estimate	Details
Family Café Partnership and Execution	\$40,000	Partnership fee and event execution
Tier 1 Partnerships	\$20,000	Additional and expanded partnerships among key organizations
Partner Bonus Program	\$12,000	Additional and expanded opportunities for partner bonus program participants
Brand Ambassador Program	\$12,000	Additional and expanded opportunities for brand ambassadors
Event Engagement	\$7,500	Sponsorship of events with high volume of individuals eligible for an account
Out-of-Pocket Expenses	\$2,500	Misc. expenses
TOTAL	\$94,000	

Q1-Q3 Enrollments by Month – Year Over Year

	FY2017	+/- YOY	FY2018
July	184	▼ -98	86
August	122	▲ 4	126
September	80	▼ -23	57
Q1 Sum	386	▼ -117	269
October	54	▲ 19	73
November	64	■ 0	64
December	84	▲ 29	113
Q2 Sum	202	▲ 48	250
YTD Sum	588	▼ -69	519
	FY2017	+/- YOY	FY2018
January	66	▲ 31	97
February	81	▲ 18	99
March	77	▲ 34	111
Q3 Sum	224	▲ 83	307
April			
May	79		
June	94		
Q4 Sum	173	▼ -173	0
YTD Sum	985	▼ -159	826



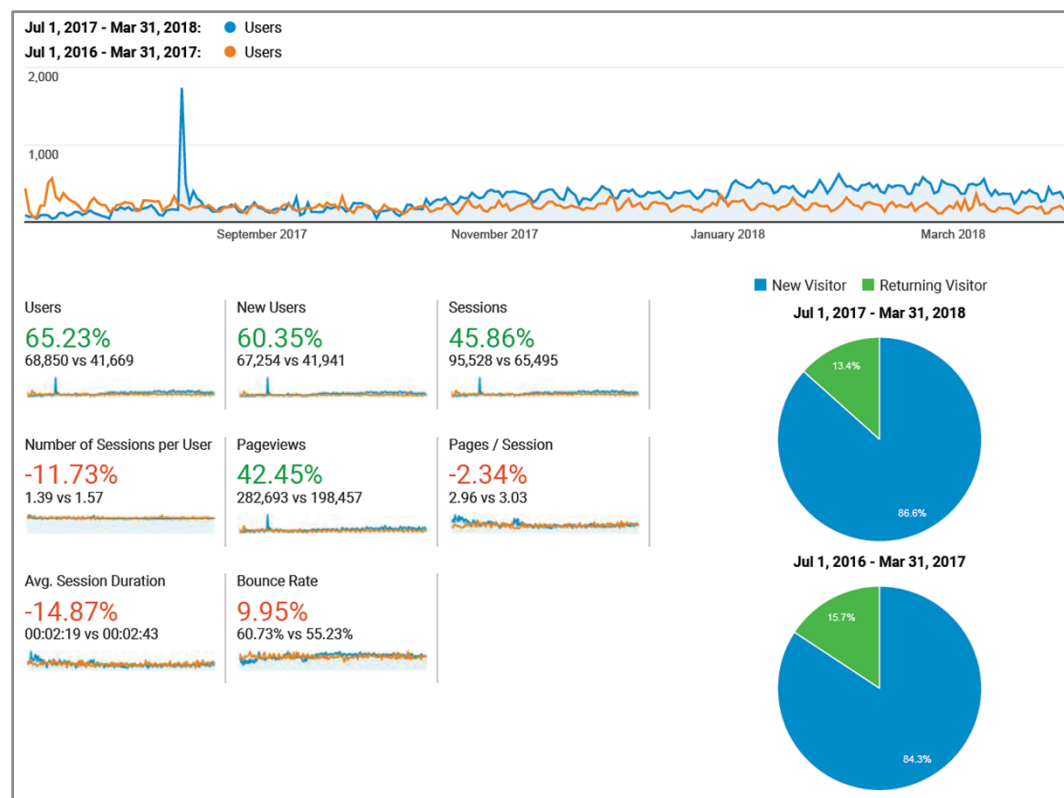
Since December, we are seeing an increase each month in enrollment year over year

Owned Media 17/18

Website Audience YOY

Takeaways include:

- Total user and new user visits are both **over 60%** higher than FY16/17, indicating a significant increase in total traffic to the site.
- As a natural result of this increase, the average session duration is down YOY and the bounce rate is up.



Owned Media 17/18

Website Acquisition YOY

Takeaways include:

- Acquisition from all channels is up YOY **65%**, with Paid Search and Direct traffic leading the way. This is in-line with previously reported Q1/Q2 YOY performance.
- Though the bounce rate is slightly higher than last year (10%) we continue to see more than **double** the attributed site conversions YOY, which is in-line with previously reported Q1/Q2 YOY performance.

	Acquisition			Behavior			Conversions		
	Users	New Users	Sessions	Bounce Rate	Pages / Session	Avg. Session Duration	Ecommerce Conversion Rate	Transactio...	Revenue
	65.23%	60.35% ↑	45.86% ↑	9.95%	2.34% ↓	14.87% ↓	48.12%	116.04% ↑	143.21% ↑
1 Paid Search	130.97% ↑			0.37% ↑			15.81% ↓		
2 Direct	32.50% ↑			7.69% ↑			72.74% ↑		
3 Social	36.36% ↑			15.00% ↑			0.05% ↓		
4 Organic Search	17.71% ↑			8.53% ↑			104.31% ↑		
5 Referral	18.43% ↑			23.52% ↑			40.97% ↑		
6 (Other)	857.58% ↑			12.21% ↑			157.52% ↑		
7 Email	14.12% ↑			21.68% ↑			355.50% ↑		
8 Display	100.00% ↑			100.00% ↑			0.00%		

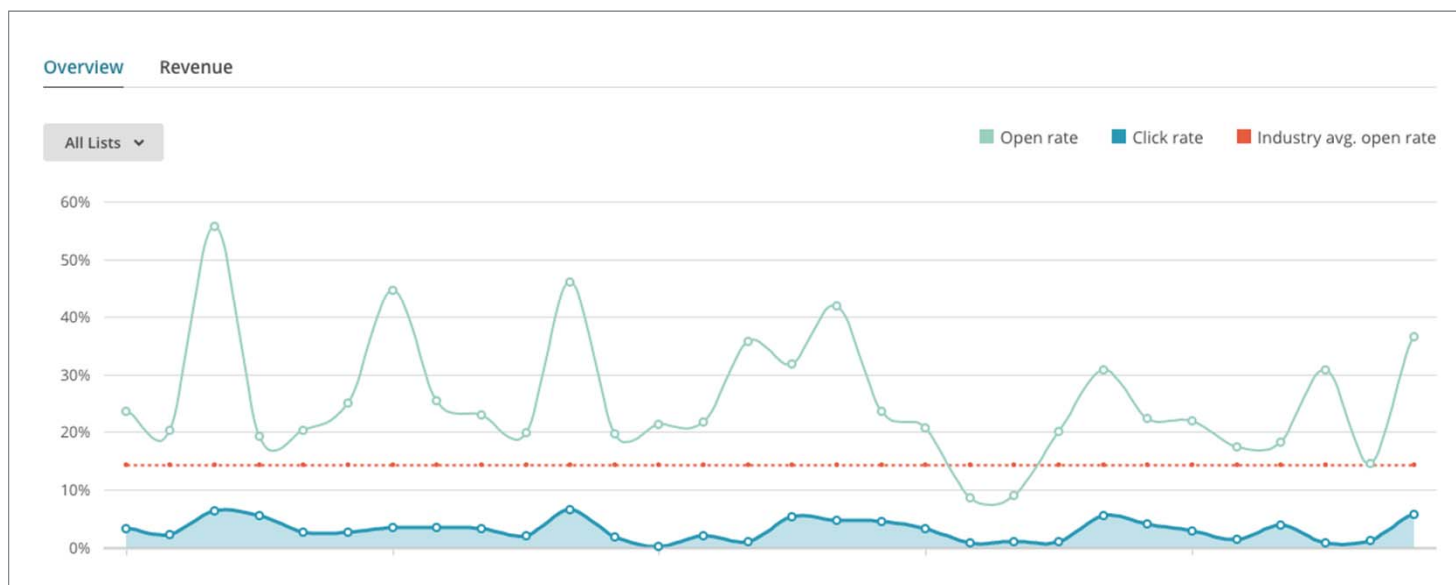
Direct: Anything not captured by another source (banners, typing full URL, clicking link that's not a Google ad)

Social: Includes paid and organic click through

Referral: User leaves another site to visit ours

Owned Media 17/18

Email Marketing



Emails Sent (FYTD): 31 (vs. 20 total in FY17)

- **4** Newsletters
- **7** Thank You/Welcome
- **8** Webinar
- **12** Misc.
- Best Performers: “Family Cafe Winner” and “2017 Savings Goal”

Open Rate: **25.6%** (Industry avg. = 14.3%)

Click Rate: **3.07%** (Industry avg. = 1.4%)

Bounces: **441**

Unsubscribe: **156**

Enrollments: **85** (vs. 23 in FY16/17)

Earned Media 17/18

Legal Professionals Outreach

- Secured email list of 1,800+ Florida Bar attorneys
- Sponsored Florida Bar Elder Law Conference
- Set up online link to request Quick Start Guides for client outreach
- December email: communicated re fee reduction
 - Open rate: **24% (426)**
 - Click through rate: **9%**
- March email: communicated re rollovers, removal of Medicaid recovery, \$15k contribution limit
 - Open rate: **25% (441)**
 - Click through rate: **16% (70)**

About ABLE United

ABLE United, Florida's qualified ABLE program, is a savings and investment program that allows Floridians with disabilities to save up to \$14,000 per year in 2017 (\$15,000 per year in 2018) without negatively impacting means-tested federal benefits like Supplemental Security Income (SSI) and Medicaid. With ABLE United, individuals can pay for a broad range of qualified disability expenses tax-free and anyone can contribute to the account, including family and friends.

We often receive questions about how ABLE United is different from a Special Needs Trust. An ABLE account can complement, or in some cases, be an alternative to, a Special Needs Trust.

Attorney Travis Fincham shares more about how ABLE United compares to a Special Needs Trust [here](#).



ABLE United Reduces Fees

In an effort to continue offering Floridians with disabilities the best value, ABLE United has reduced its \$2.50 monthly account maintenance fee for both current and future enrollees to \$0.00. With no application fee, no account fee and no minimum contribution, enrollment is free.

Learn more [here](#).

ABLE United has exciting changes to help account holders:

1. Update on removal of Medicaid recovery
2. Rollovers from 529 college savings plans
3. Increased contributions above annual maximum contribution limit (\$15,000).
4. Beneficiaries may be able to utilize the Federal Tax Savers Credit

Our program is working to implement these changes. For more details, please click [here](#).



Interested in Receiving ABLE United Materials?

We'd be glad to provide you with materials to help educate your clients about ABLE United. Please click [here](#) to request educational items to be sent to you, free of charge.

Communications: No Fees and Medicaid Recovery

Current News and Events

In keeping with our mission to help you "Achieve a Better Life Experience," ABLE United has reduced its \$2.50 monthly account fee to zero for both current account holders and future enrollees. With no application fee and no monthly account fee, there's even more incentive to start saving!

[Read More](#) →

October 2017 Newsletter



ABLE United

Posted by Sjp Kaitlyn
November 12, 2017 · 🌐



We're proud to announce that we are waiving monthly account fees for both current and future enrollees!

Check out our blog to learn more about our efforts to become the go-to low cost leader of ABLE ac... [See More](#)



November 2017 Social Post



ABLE United Spotlight

At ABLE United, we want to make you aware of several upcoming changes to our program that positively impact our ABLE United account holders. These updates include:

1. The first steps have been made to remove Medicaid recovery from ABLE accounts.
2. Rollovers from 529 college savings plans to ABLE accounts.
3. Beneficiaries who work and earn income will now be able to make contributions into their ABLE accounts in excess of the annual maximum contribution limit (\$15,000).
4. Individuals who are able to take advantage of contributing earned income to their ABLE account may be able to utilize the Federal Tax Savers Credit.

[Read More](#) →

April 2018 Newsletter

Marketing Plan

FY 2018/2019 Performance

FY 2019/2020 Executive Summary

Presented by: Moore and SJ&P

June 25, 2019



FY18/19 Marketing

FY18/19 Executive Summary

Key Objectives and Goals

Objective	FY17/18 Final	FY18/19 Goal	FY18/19 as of May 15
New Accounts	1,239	1,350	936
Account Balance	\$4,146	\$3,000	\$4,670

Highlights

- Reduced Marketing budget by 20% (\$262,813)
- Cost per acquisition projected to decrease 25% (\$1,146 to \$856)
- System transition starts/stops reduced paid media and slowed enrollment
- Promoted new account features beginning Q4: FDIC-insured savings option, live chat with customer service, enhanced gifting page

FY18/19 Q1-Q3 Activity by Channel

	PAID	OWNED	EARNED
DESCRIPTION	<i>Digital video & display, social media and search</i>	<i>Organic social, email marketing, website</i>	<i>Advocacy, Brand Ambassadors, partnerships and earned media</i>
ACTIVITIES	Digital Video 3,000 clicks, 92% video completion rate	Website 104,000 page views 36,000 new visits	Brand Ambassadors (8) Attended 23 events statewide Reached more than 5,800
	Digital Display 9,000 clicks 71 enrollments	Eligibility Wizard 1,178 "Yes" Completions	Managed three partnerships reaching 12,000+ via email and events
	Paid Social Media 8,413 clicks 113 enrollments	Email Campaigns 17 emails 248 enrollments	Communicated with 303 advocacy organizations
	Paid Google Search 16,739 clicks 170 enrollments	Facebook Organic Social 215,000 reached 92 posts	Represented at 41 events 16,000+ attendees
CONVERSIONS ¹	354	384	10
TOTAL CONVERSIONS	748		

¹ Conversions may overlap multiple channels. For directional purposes only.
Earned media conversions not accurate due to removal of promo codes.



ABLE Market Analysis & Lessons Learned

FY18/19 Market Analysis

ABLE National Landscape

Number of ABLE Programs: 42

Number of Funded ABLE Accounts : 40,422

Average Account Balance: \$5,536

ABLE-Eligible Population Estimate*: 8,040,000

ABLE Florida Landscape

Number of ABLE Programs Floridians have access to: 25

Number of Funded ABLE United Accounts: 2,682

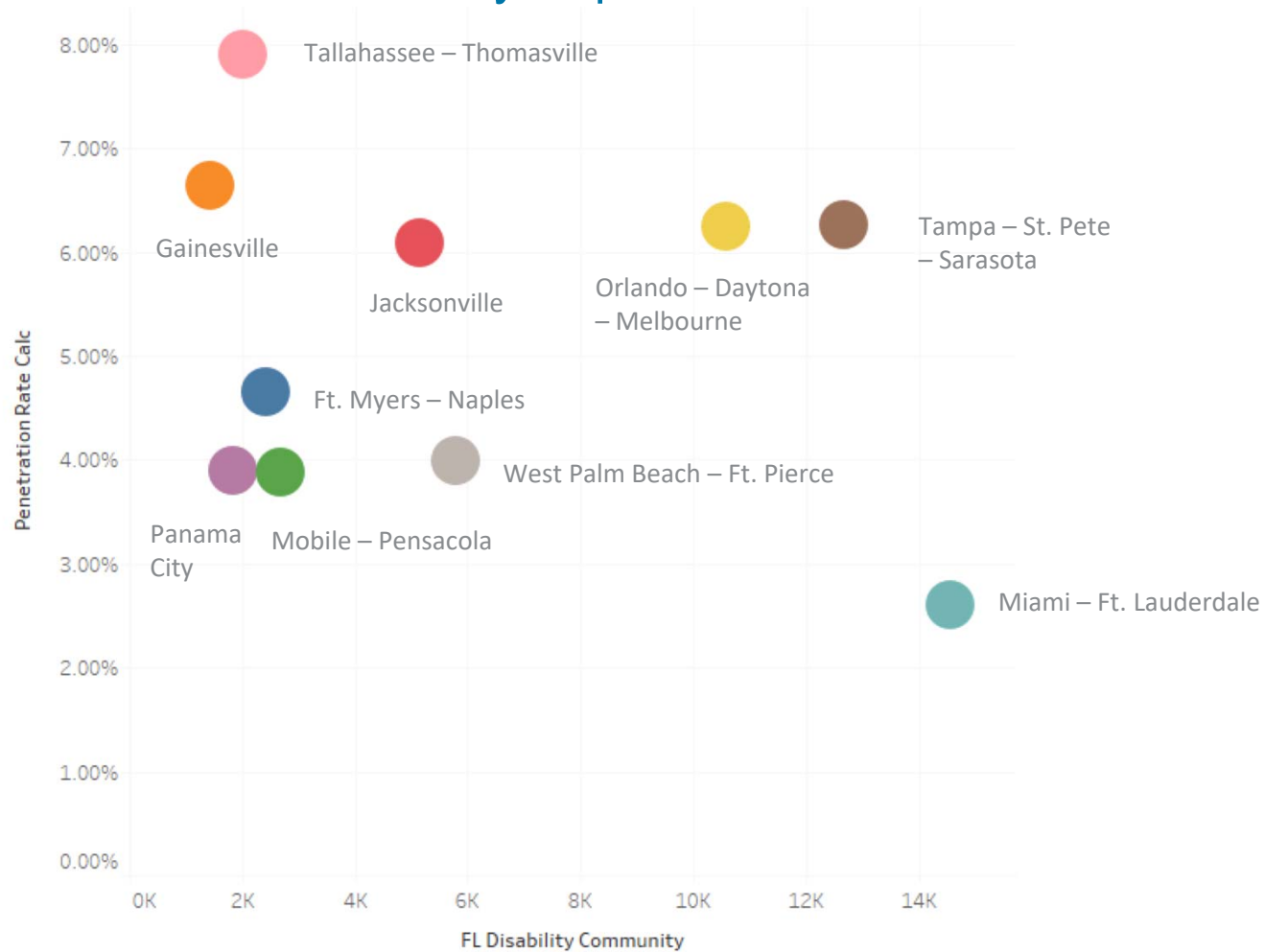
Approximately ½ of current accounts are part of APD waiver or wait list population

Average Account Balance: \$5,294

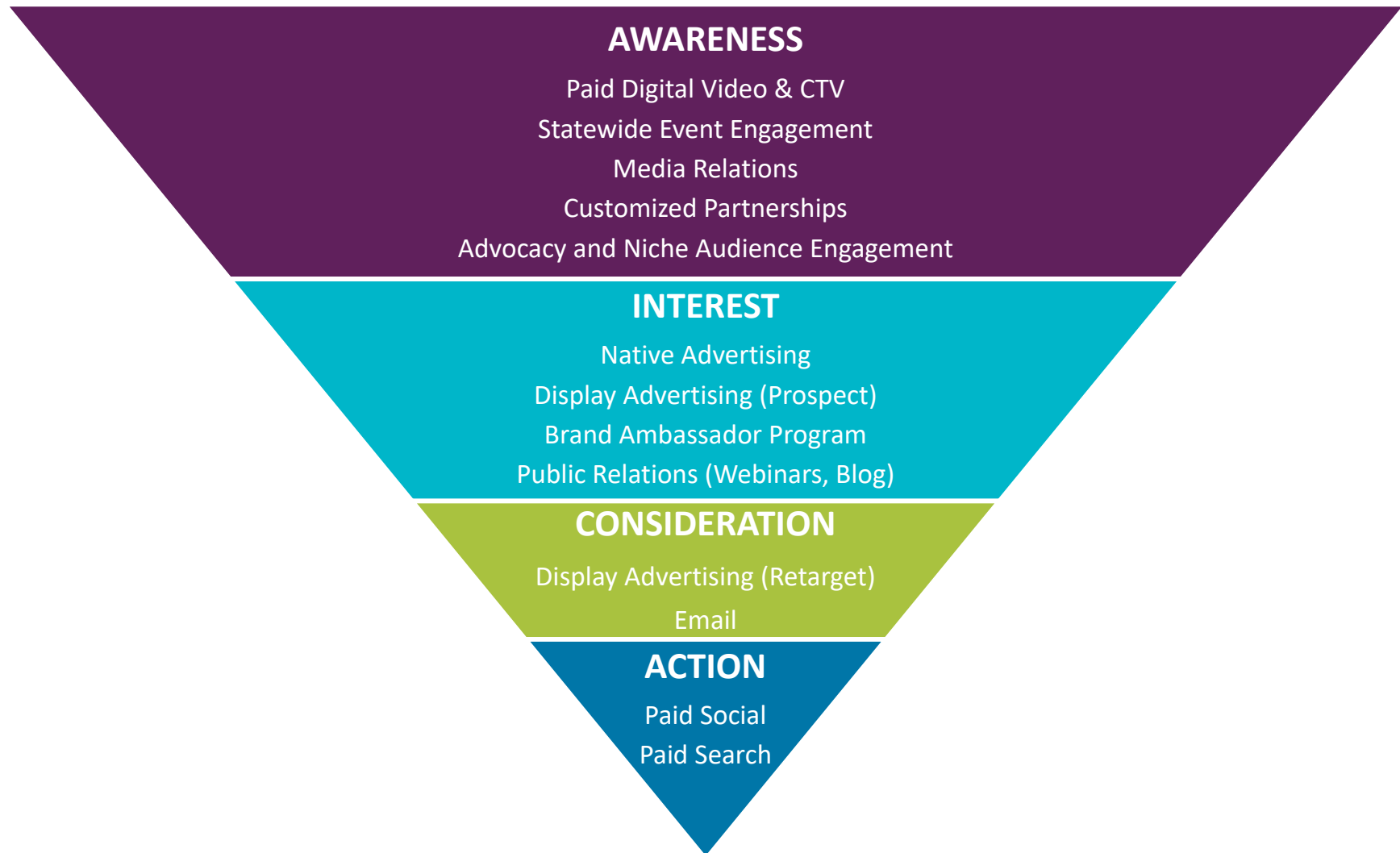
Florida ABLE-Eligible Population Estimate*: 525,000

FY 18/19 Market Analysis

Penetration Rate vs. Disability Population



Channel Strategy



FY 18/19 Lessons Learned

Most effective outreach

- Communication and outreach to disability organizations
- Representation from Brand Ambassadors/Families within community
- One-on-one opportunities with decision maker
- Email marketing to subscribers
- Paid search, social media and targeted display efforts
- Incentive offers at enrollment events

Least effective outreach

- Paid TV/Radio provides no sizeable return on investment
- Broad direct mail is expensive and difficult to target
- Outreach to fringe disability groups where diagnosis is not severe or occurs after 26 (Lupus, ADHD, and PTSD)



FY19/20 Marketing Plan Executive Summary

FY 19/20 Objectives and Goals

Objectives	
<ul style="list-style-type: none"> • Enroll 1,350 new accounts • Sustain a 90%+ retention rate after one year • Maintain an average account balance of \$3,000 	
Goals	Tactics
Increase website conversion rate by 10%	Improve user experience Refresh content (Prepaid card, new videos, qualified expenses) Build custom landing pages
Paid digital channels to contribute 45% of all enrollments (29% increase YOY) with a \$700 digital cost per enrollment	Strategic flighting with an evergreen media presence NEW emphasis on South Florida Custom creative for legal audiences
Increase email marketing conversions by 10%	Dedicate up to eight emails for prospecting Customize and personalize when possible
Increase advocacy group engagement by 15% (348 total groups)	Increase engagement with one-on-one outreach and customized activations, to raise awareness through organizations' communication channels
Activate 8 new brand ambassadors (16 total) statewide and represent ABLE United at a minimum of 60 events (62% increase)	Recruit, train and prepare brand ambassadors with tools to represent ABLE United in their communities and at key events
Enroll 150 new accounts through key partnerships and events	Engage partners and niche audiences to promote one-on-one outreach and enrollment



South Florida Pilot Strategy

Miami Area Insights and Opportunities

When comparing data across the state of Florida, the Miami DMA is unique.

- Miami DMA accounts for **24.64%** of the Florida disability community, but only **13.01%** of all account holders.
- Miami ranks 8 out of 10 Florida markets for paid media conversion rate (attributable conversion/impressions) and as a result only receives 13.84% of impressions.
- Our low cost per acquisition goal has negatively impacted the delivery of paid media in Miami, due to the expensive media landscape¹ and poor propensity to convert.

Key Findings – Hispanic Audience

- **Family is priority**
 - **80%** state that family is the most important thing to them
 - **54%** indicate that they dedicate all their spare time to activities with their family.
- **Audience is social**
 - **83%** on Facebook (vs. 67% non-Hispanic)
 - **77%** on YouTube (vs. 45% non-Hispanic).
- **Gravitates toward biculturalism**
 - Nearly half fall within this group as they balance American and Hispanic cultures.
 - **62%** of Hispanics ages 18-55 do half their online reading in Spanish.

South Florida Market Pilot Strategy

Activity by Channel

Paid

- Dedicate **25%** of all paid media impressions to the Miami DMA for equitable distribution across FL
- Concept and develop culturally relevant Hispanic messaging and creative

Owned

- Develop a strategic landing page using community-based and family-first language
- Geo-target South Florida communities to highlight Miami events and share Hispanic stories on ABLE United's Facebook page

Earned

- Conduct one-on-one conversations with South Florida experts and advocates
- Expand Brand Ambassador Program in South Florida market to include West Palm Beach and Fort Lauderdale with emphasis on securing a bilingual (Spanish-English) ambassador
- Develop custom activation with personal outreach as part of Best Buddies Florida partnership
- Engage with targeted South Florida and Hispanic disability organizations
- Seek sponsorships in key events, including The Expo and the Dan Marino Walk About Autism & Expo

South Florida Incremental Expense = \$34,500



FY19/20 Channel Enhancements

FY19/20 Paid Media Enhancements

South Florida: Miami*

- Dedicate 25% of digital display, video, paid social impressions to Miami
- Use culturally relevant creative and separate campaign from general market

Strategic flighting for evergreen presence

- Plan heavier spending in months with higher search volume and events

Estate Planners & Personal Injury Attorneys*

- Dedicated budget for messages relevant to this audience
- Targeted LinkedIn advertising
- Paid social support to target Bar association email list
- Paid social webinar support for Legal community education (CLE)

First party data

- Incomplete application targeting
- Create lookalike audiences for digital display and video

New Creative Banner Ads

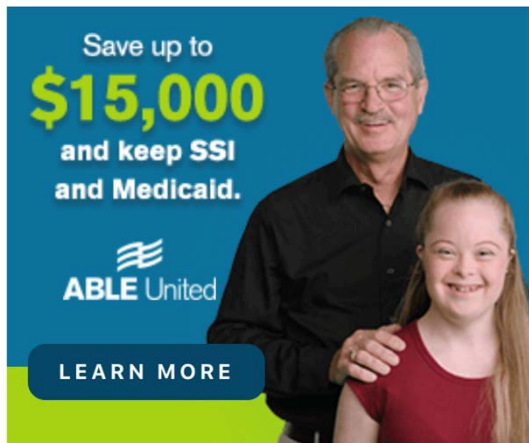
- In banner Eligibility Wizard
- Original content native ads

Paid media hard costs remain flat = \$380,000

FY19/20 Paid Media Content Strategy

Overview

- Refresh creative two times during year to leverage concepts and footage created in the spring 2019.
- Fresh content will keep prospects interested and engaged, increasing likelihood of enrollment.



FY19/20 Owned Media Enhancements



Organic Social Media



Email Communications



Website

- Increase informational and support-driven original content
 - Encourage user-generated content
 - Collaboration with earned efforts to showcase community partnerships and events
- Nurture and convert prospects with sequenced emails
 - Include value-ad content in quarterly newsletters to position ABLE United as a resource within the disability community.
- Identify and improve user website experience (UX):
 - Strategically place new video content at key decision points
 - Allow users to discover richer content on the questions they seek most (e.g. qualified expenses)

Incremental increase = \$51,300 to cover media service fee, social media production, additional emails, and website enhancements

FY19/20 Earned Media Enhancements

Expand one-on-one advocacy outreach

- Engage 45 new advocacy groups and focus on areas with low program participation, e.g. Mental health, visual impairment, etc.

Expand and enhance Brand Ambassador program

- Produce coordinated brand messaging shared through social media
- Create multiple touch points with audiences to drive site traffic, develop brand familiarity and increase conversions

Expand legal community engagement

- Additional outreach to new segments, including estate planners and personal injury attorneys
- Niche event participation, e.g. Orange County Bar Association

Use promo codes for \$25 customer account contribution to assist tracking of webinars, ambassadors and partner effectiveness

Conduct National Savings Day Campaign satellite media tour to promote saving with ABLE United

Incremental increase = \$67,375 to cover account contributions, satellite media tour, niche engagement and South Florida outreach

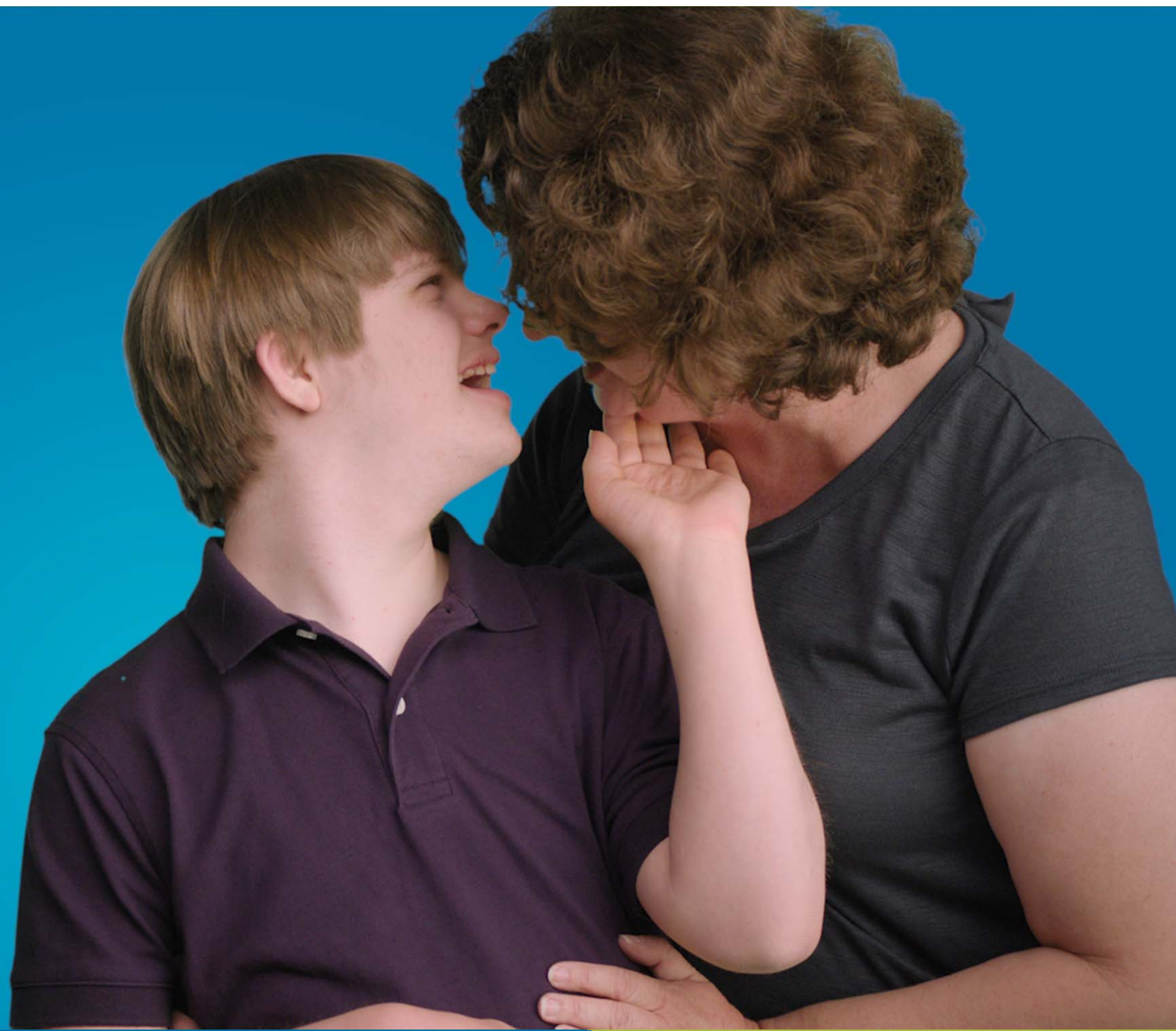


FY19/20 Budget Allocation

FY19/20 Proposed Budget

Combined Budget by Channel

Category	FY17/18 Actual	FY18/19 Planned	FY19/20 Proposed
Professional Fees	\$623,073	\$444,000	\$444,000
PAID: Media Placements	\$505,550	\$380,000	\$380,000
OWNED	\$130,688	\$113,200	\$164,500
EARNED: PR & Partnerships	\$159,702	\$94,000	\$161,375
Contingency / Add'l Funding	\$0	\$175,000	\$56,325
Total	\$1,419,013	\$1,206,200	\$1,206,200
Enrollment	1,238	1,350	1,350
Cost Per Enrollment	\$1,146	\$893	\$893



Appendix

FY 19/20 Budget Recommendations

Paid Media

Item	Budget Estimate	Details
Digital Video	\$70,000	Consistent statewide coverage; dark period in December
Digital Display	\$150,000	Consistent statewide coverage; dark period in December
Paid Social	\$70,000	Annual, statewide coverage
Paid Search	\$90,000	Annual, statewide coverage
TOTAL	\$380,000	

FY19/20 Paid Media Plan

Annual Flowchart

	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	% Total Cost	Net Cost
ABLE FY1920 Media Plan														
Digital Display														
All Florida Markets Except Miami	\$12,000	\$8,250	\$6,750	\$7,500	\$7,500		\$12,750	\$10,500	\$12,000	\$10,500	\$12,000	\$12,750	30%	\$112,500
Miami Only		\$3,150	\$2,650	\$2,900	\$2,900		\$4,650	\$3,900	\$4,400	\$3,900	\$4,400	\$4,650	10%	\$37,500
TOTAL DIGITAL DISPLAY	\$12,000	\$11,400	\$9,400	\$10,400	\$10,400		\$17,400	\$14,400	\$16,400	\$14,400	\$16,400	\$17,400	39%	\$150,000
Digital Video														
All Florida Markets Except Miami	\$5,250	\$4,500	\$3,750	\$4,500	\$3,750		\$6,000	\$4,500	\$5,250	\$4,500	\$4,500	\$6,000	14%	\$52,500
Miami Only		\$1,600	\$1,500	\$1,600	\$1,500		\$2,200	\$1,700	\$1,900	\$1,700	\$1,700	\$2,100	5%	\$17,500
TOTAL DIGITAL VIDEO	\$5,250	\$6,100	\$5,250	\$6,100	\$5,250		\$8,200	\$6,200	\$7,150	\$6,200	\$6,200	\$8,100	18%	\$70,000
Paid Search: All Florida Markets														
Paid Search	\$8,000	\$6,000	\$5,000	\$6,000	\$6,000	\$6,000	\$8,000	\$6,000	\$7,000	\$6,000	\$8,000	\$8,000	21%	\$80,000
Paid Social														
Facebook: All Florida Markets Except Miami	\$4,725	\$4,050	\$4,050	\$4,050	\$4,050	\$4,050	\$5,400	\$4,725	\$4,725	\$4,725	\$4,725	\$4,725	14%	\$54,000
Facebook: Miami Only		\$1,650	\$1,650	\$1,700	\$1,700	\$1,700	\$2,100	\$1,900	\$1,900	\$1,900	\$1,900	\$1,900	5%	\$20,000
LinkedIn: Estate planners and personal injury attorney targeting		\$500	\$500	\$500	\$500	\$500	\$700	\$550	\$600	\$550	\$550	\$550	2%	\$6,000
TOTAL PAID SOCIAL	\$4,725	\$6,200	\$6,200	\$6,250	\$6,250	\$6,250	\$8,200	\$7,175	\$7,225	\$7,175	\$7,175	\$7,175	21%	\$80,000
TOTAL NET COST	\$29,975	\$29,700	\$25,850	\$28,750	\$27,900	\$12,250	\$41,800	\$33,775	\$37,775	\$33,775	\$37,775	\$40,675	100%	\$380,000

- Flighting is more consistent this year to maintain evergreen presence
- Media weights will change as promotions are determined

FY 19/20 Budget Recommendations

Owned Media

Item	Budget Estimate	Details
APD Outreach	\$40,000	Direct mail effort
Email Marketing	\$15,000	MailChimp subscription; up to 12 emails ¹
Video/Photography Production ²	\$35,000	Creative Edit – July 2019 and May 2020
Website Management ³	\$0	15 hrs./month included in fee
Website Development	\$20,000	Analysis, design and production of site enhancements
Collateral and Promotions	\$25,000	Production, fulfilment and storage
Social Media Production	\$15,000	Video, GIFs and original content
Media and Creative Service Fee	\$12,500	Plan/buy/optimize/report two additional paid campaigns: legal professionals and Miami/Hispanic
Out-of-Pocket Expenses	\$2,000	Misc. expenses
TOTAL	\$164,500	

¹ Four quarterly newsletters and 8 prospect emails

² Photography retouching for up to 20 images from campaign shot in FY18/19 and image purchase required for May 2020 campaign

³ Any website enhancements that require analysis, design and programming will be billed as a separate project

FY 19/20 Budget Recommendations

Earned Media

Item	Budget Estimate	Details
South Florida Research and Pilot Engagement	\$22,000	Research (20 hours), high level overview of findings, ongoing identification of new groups to engage, regular meetings and development of support materials (10 hours / month add'l outreach)
National Savings Day Campaign	\$15,000	Costs associated with conducting a satellite media tour and coordinating purchase of giveaway item
\$25 Contributions – Promo Codes	\$16,875	New customer promo code redemption
Brand Ambassadors	\$25,000	Ambassador compensation based upon event reach and length of time for up to 20 brand ambassadors for one year.
Partnerships and Events	\$80,000	Costs associated with partnerships (e.g. Family Café, Elder Law) and events (e.g. event exhibitor fees)
Out of Pocket Expenses	\$2,500	Miscellaneous expenses
TOTAL	\$161,375	

FY18/19 Florida Market Analysis

Distribution of Disability Community and ABLE United Accounts

DMA	FL Disability Community (% of Total) ¹	Penetration Rate ²	Account Open Rate ³	Current Account Holders (% of Total)	Impressions (% of Total) ⁴	Paid Media Conversions ⁴	Paid Media Conversion Rate ⁵	Paid Media Conversions (% of Total)
Gainesville	2.39%	6.65%	0.0052%	3.22%	2.23%	21	0.0012%	2.09%
Panama City	3.09%	3.89%	0.0047%	2.43%	1.86%	26	0.0017%	2.59%
Tallahassee – Thomasville	3.40%	7.90%	0.0044%	5.44%	4.46%	59	0.0016%	5.87%
Jacksonville – Brunswick	8.70%	6.08%	0.0040%	10.72%	9.49%	105	0.0014%	10.45%
Mobile – Pensacola	4.53%	3.88%	0.0038%	3.56%	3.35%	34	0.0012%	3.38%
West Palm Beach – Ft. Pierce	9.80%	3.99%	0.0036%	7.91%	7.82%	75	0.0012%	7.46%
Tampa – St. Pete – Sarasota	21.45%	6.26%	0.0036%	27.18%	27.03%	281	0.0013%	27.96%
Miami – Ft. Lauderdale	24.64%	2.61%	0.0034%	13.01%	13.84%	128	0.0011%	12.74%
Orlando – Daytona Beach – Melbourne	17.90%	6.25%	0.0034%	22.66%	24.13%	229	0.0012%	22.79%
Ft. Myers – Naples	4.10%	4.66%	0.0024%	3.87%	5.79%	47	0.0010%	4.68%
TOTAL	100.00%	4.94%	0.0036%	100.00%	100.00%	1,005	0.0012%	100.00%

FY18/19 Enrollments by Month

Year Over Year

ABLE United Enrollment					
	2016-17	+/- YOY	2017-18	+/- YOY	2018-19
July	184	▼ -98	86	▲ 28	114
August	122	▲ 4	126	▼ -36	90
September	80	▼ -23	57	▲ 32	89
Q1 Sum	386	▼ -117	269	▲ 24	293
October	54	▲ 19	73	▲ 8	81
November	64	■ 0	64	▼ -6	58
December	84	▲ 29	113	▼ -35	78
Q2 Sum	202	▲ 48	250	▼ -33	217
YTD Sum	588	▼ -69	519	▼ -9	510
	2016-17	+/- YOY	2017-18	+/- YOY	2018-19
January	66	▲ 31	97	▲ 5	102
February	81	▲ 18	99	▼ -33	66
March	77	▲ 34	111	▼ -41	70
Q3 Sum	224	▲ 83	307	▼ -69	238
April	71	▲ 54	125	▲ 8	133
May	79	▲ 16	95	▼ -95	0
June	94	▲ 99	193	▼ -193	0
Q4 Sum	244	▲ 169	413	▼ -280	133
YTD Sum	1056	▲ 183	1239	▼ -358	881

