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| 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/](http://www.myfloridaprepaid.com/who-we-are/about-the-board/board-reports-and-plans/). | |

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| TAB 1: Invitation to Negotiate Acknowlegement | |
| 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: |  |
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| Telephone: |  |
| E-Mail Address: |  |
| Authorized Signature: |  |
| Date: |  |
| Printed Name & Title: |  |

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| 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. | |  |  |  |
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| 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. | |  |  |  |
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| 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: |  | | | | | | | | | | | | |
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| **Organization Overview** | | | | | | | | | | | | | |
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| 1. Please introduce the organization by providing a brief overview of structure and history:    1. Business name    2. Year founded    3. Office locations and contact information    4. Description of organization structure, including the parent company, subsidiaries, affiliates, etc.    5. Brief history of the organization.    6. Description of core offerings and service capabilities.    7. Description of Respondent’s leadership team qualifications and credentials.    8. Is the organization a certified Minority Owned Business?    9. 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. | | | | | | | | | | | | | |
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| 1. Staffing    1. 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.).    2. 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:       1. Name - Team member name and title.       2. Role - Role description and responsibilities.       3. Experience - Evidence of previous experience in this role.       4. Tenure - How long with the organization.    3. 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.    4. 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.    5. 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. | | | | | | | | | | | | | |
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| 1. 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.   * 1. Less than $1 million,   2. $1 million and less than $3 million,   3. $3 million and less than $5 million,   4. $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 | | | | | | | | | | | | | |
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| **Experience** | | | | | | | | | | | | | |
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| 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:   1. Describe how the Respondent is differentiated from other service providers. 2. Describe the Respondent’s experience in the financial industry. 3. Describe the Respondent’s experience in the area of new product launches or re-launches of existing products. 4. Describe the Respondent’s experience with the use of market research and other data to create effective communications programs. 5. Describe the Respondent’s notable experience in any non-traditional, new or up-and-coming Communication Services strategies. 6. Describe any experience relevant to working with non-profit Foundations or fundraising entities. 7. Describe any experience relevant to working with disability organizations or disability-driven campaigns. | | | | | | | | | | | | | |
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| 1. Please describe the organization’s ethics policy. Please address how ethical behavior is encouraged and how policy violations are handled. | | | | | | | | | | | | | |
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| 1. Please describe the organization’s procedures for ensuring security of customer data and sensitive information, including subcontractors. | | | | | | | | | | | | | |
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| **Regulatory Restrictions, Litigation and Conflicts of Interest** |
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| 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. |
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| 1. 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. |
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| 1. 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. |
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| 1. 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. |
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| 1. 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. |
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| 1. 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.* |
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| 1. 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.* |
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| 1. 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. |
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| 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: |  |
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| **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 | |
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| **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) |
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| **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. |
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| **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) |
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| **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. |
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| 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. | |
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| 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.

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| **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.