

**Regarding RFQ24-002 Media and Marketing Services,
the following are the Questions and Answers from the Pre-bidders Conference
on January 25th**

1. Are there RFQ brand guidelines? Can you provide them?
Answer: Yes
2. Are there demographics? Can you provide them?
Answer: Demographics are tracked and available for the development of programs' campaigns.
3. Have you conducted an audit or analysis of competitive 529s against PA demographics?
Answer: No, not really – Cannot buy a PA529 plan through a financial advisor, only through Treasury as we are direct-sold plans. We aim to reach all Pennsylvanians to get a diverse audience – have made strides to make PA529 more accessible.
4. How much data do you have on the current PA529 Program? Willing to share?
Answer: Tons!! And, yes, we can share aggregated data, no PII.
5. Can you talk a little more about outreach to rural areas?
Answer: We've done some research through the Center for Rural PA and looked at that information, our outreach teams travel throughout the Commonwealth, so we also have feet on the ground information from visiting all corners of PA.
6. Have you conducted Focus Groups?
Answer: No, not recently. There is, however, such data available from market research done by other programs and the College Savings Plan Network.
7. Have you done any quantitative work on 529 or polling?
Answer: no polling, some data analytics on trends and account changes.
8. Do you have Google analytics?
Answer: Yes
9. Social Media Platform?
Answer: We use Social Pilot for our scheduled postings on Twitter, Facebook and Instagram.
10. Bidding Side – Are there extra points given to Small/Diverse/Veteran owned businesses?
Answer: Treasury is requesting quotes, not bids. It is a best value selection process and not a contract award process. Treasury seeks to provide small, diverse, and veteran owned enterprises an opportunity to fairly compete for Department work contracted through existing statewide contracts.
11. Are you willing to share the spend on the media?
Answer: Already under contract with Red House Communications
Sample media plan is in the RFQ – It will be a collaboration between Treasury, Red House and the selected bidder.

The following are additional Questions sent to RFQ24-002 email box, along with the corresponding Answers in blue.

1. Simply, can you please provide the data that you graciously were offering to potential respondents:

- Existing audience segmentation data
- Aggregated data for the programs (who's signing up, when, etc.)

Yes,

- The Center for Rural PA report has good data: [Differences in Rural and Urban PA 529 Education Savings Accounts, 2018-2022 \(patreasury.gov\)](https://patreasury.gov/pdf/newsroom/Treasury-529-Accounts-2023.pdf). <https://patreasury.gov/pdf/newsroom/Treasury-529-Accounts-2023.pdf>
- County level data on Treasury website - [Pennsylvania Treasury Transparency Portal \(patreasury.gov\)](https://www.patreasury.gov/transparency/county-level-data.php). <https://www.patreasury.gov/transparency/county-level-data.php>

2. Is the vendor being asked to provide anything in the quote submission beyond filling out the pricing form on page 8?

No, as all potential responders currently have valid contracts with the Commonwealth. However, any additional information a responder would like to provide regarding the primary team who will be assigned to this engagement, or examples of similar work provided to other clients, or any other information that might help differentiate the responders would be welcomed and appreciated.

3. Section two on page 8 says Media Planning & Buying.

a. This should just say media planning, correct? Red House is managing buying. Or are you asking for a quote to buy/place media?

- The vendor selected would work with PA Treasury + Red House to propose/create updated media schedules/plans as shown on page 7. Red House would do the actual media buy based on the proposed plan.
- "Media Planning" would cover proposal/creation of updated media schedules and tactics as shown on page 7.
- "Buying Services" would be coordinating the schedule/spend with Red House.
- This is included in section 2 on page 5:
 - Identify and recommend the optimum use of advertising budget.
 - Provide direction regarding effectiveness of potential tactics.
 - Continuously monitor all tactics of paid media campaigns
 - Recommend and conduct on-going (real-time) reallocation of resources in the best interest of the programs.

b. Are you requesting proposed media budgets alongside agency services in section two?

Vendor need not provide media budgets. PA Treasury would work with the selected vendor and provide a total budget at the appropriate time.

c. What information goes in the section circled below labeled "Advertising and Marketing Campaign"? Creative services are asked separately in section 3. Are you asking for printing, video production, metric tracking platform fees, sponsorship fees, and other hard costs in the "Advertising and Marketing Campaign" line item?

2	Media Planning and Buying Services
	Executable segmented media plan developed and delivered to PA Treasury's Bureau of Consumer Programs for implementation by the vendor through media channels. Monitoring and evaluation reports delivered as agreed upon.
	PA 529 College and Career Savings Program
	Advertising and Marketing Campaign
	Media Planning and Buying Services

- i. The cost estimate goes here for what is outlined in RFP Section 2 - the cost to plan and create PA 529's advertising and marketing campaign.
 - ii. The printing, video production, metric tracking platform fees and other hard costs should be included.
 - iii. Direct costs of sponsorships would not be included, but costs to propose, evaluate, and manage sponsorships would be included.

4. Section 3 on page 8. We'd again like to clarify where out-of-pocket costs belong.
 - a. Do all out-of-pocket production costs need to be included within the agency services cost in section 3?

Yes, the proposal could say "Our proposal includes the total costs to provide no more than one (1) video for each program."

 - b. Do the costs for focus groups need to be included within the agency services cost in section 3?

It says "Vendor, utilizing focus groups and/or other methods will gather feedback" ...

Include cost of one (1) focus group project for each program.

5. How frequently would the Treasury like to meet in person?

There is no required frequency to meet in-person, however vendor will schedule and lead monthly meetings with Treasury and meet with Treasury as needed or requested.

6. Do agency travel costs belong in section two or section three of the form on slide 8?

Agency travel costs should be factored into the overall cost proposal and do not belong as a separate line item in the quote.

7. Please state any additional desired information that is to be provided back with our quote. Ex. Overview of the agency, case studies, etc.

Potential bidders may include examples of work, but it is not required with the quote.

8. Is the vendor being asked to supply the proposed media mix plan on page 7 of the PDF as part of the quote submission?

No

 - a. If yes, the following questions below apply, please detail your target audiences by program.

N/A

9. Who is responsible for trafficking materials? Red House or Vendor?

Red House is responsible for trafficking materials.

Vendor will manage asset delivery to Red House, Red House will manage asset delivery for actual media buy/placement.

10. PR is not outlined in the scope of work. Should we add time for press releases and media relations?

No

11. On page 5 you mention "Creation of social media operations plan." Are you asking for an editorial calendar, actual creative posts, or total community management which encompasses the calendar, the posts, and the actual posting in social channel platforms?

Vendor will provide editorial calendar and creative posts.

Most will be trafficked as "paid/boosted" posts, where Red House will manage the posts.

Some of the same posts/content will be used by PA Treasury's social media team as organic posts.

12. On page 6 you reference ongoing support for public websites.

a. Is this content support only?

Yes, this refers to keeping content/imagery on site updated/relevant/topical. It does not mean included technical website development or IT-related work.

b. Does this include working in your CMS to make changes?

No, see above.

c. Does this include front-end development or coding work as needed?

No, see above.

13. On page 6 you reference "Creation of program promotional outreach material." Please provide an estimated number of all collateral and presentation slide deck units anticipated on an annual basis by program.

It is estimated that each of our four programs may require two presentation decks.

Each program has collateral materials – an average of three per program. These include brochures, flyers and other printed materials.

14. Is there an incumbent agency that was prior handling this work? What are some of the past challenges or performance issues that you've experienced with your agency partners?

No, nearly everything outlined in this SOW is managed by Treasury's internal teams.

15. Should we assume that our proposal does not include printing or mailing costs for the materials we create?

The proposal should not include any printing or mailing costs.

16. Are campaigns refreshed yearly, bi-annually, etc.? What is the intended shelf life for the campaigns we will create in 2024?

Overall campaigns would be refreshed approximately every two years.

We would expect to use these campaigns into 2025 with slight tweaks to the messages, while maintaining the overall campaign tone.

17. In addition to the paid media tactics, will the agency be responsible for creating organic social content to support all three programs?

Yes, we would expect to use paid social media content as organic social posts, as well as social content developed just for organic posts.

Meaning an ad created for paid social is expected to be available to Treasury to post organically.

18. In addition to campaign tactics, is there any other collateral or support materials that should be considered in our response? We assume any of those needs would be covered in 4. General Agency Time.

Correct, anything that may be considered as a "one-off" request could be done under section 4.

19. There is a pricing matrix in the RFQ packet that is highlighted in yellow. Do we need to complete and submit this form, or follow similar formatting in the layout for our response?

Yes, please complete and submit the pricing matrix within your response.

20. Can you provide additional detail on the selection criteria and what Treasury values most in their agency partner?

No

21. Per the information included in the RFQ, we know that defined metro and rural media markets, as well as other defined audience segments, are a priority. Can you provide details on these markets and audience segments?

The Center for Rural PA report has good data: [Differences in Rural and Urban PA 529 Education Savings Accounts, 2018-2022 \(patreasury.gov\)](#)

County level data on Treasury website - [Pennsylvania Treasury Transparency Portal \(patreasury.gov\)](#)

22. In response to a question on the pre-bid call, you indicated that you are willing to share brand guidelines, aggregated research, and other data. Can you please provide that information for review?

The Center for Rural PA report has good data: [Differences in Rural and Urban PA 529 Education Savings Accounts, 2018-2022 \(patreasury.gov\)](#)

County level data on Treasury website - [Pennsylvania Treasury Transparency Portal \(patreasury.gov\)](#)

Brand guidelines will be shared with prospective bidders.

23. What are their specific KPIs?

We measure account growth on enrollments and contributions as well as several supporting KPIs. Sample examples are listed below, but generally we measure:

- i. GSP + login clicks = current AO engagement
- ii. GSP + enrollment clicks = lead engagement
- iii. PA ABLE login clicks = current AO engagement
- iv. PA ABLE enrollment clicks = lead engagement
- v. Keystone VS clicks = "AO" engagement
- vi. Keystone pre-reg clicks = lead engagement

24. How do they plan on measuring success?

Overall, for PA 529/PA ABLE/Keystone, the main drivers are enrollments/contribution/claim rate, etc.

Another measurement can be social engagement, reactive community engagement (i.e. we're invited to events, etc.).

25. How do they define or differentiate "audience"?

The Center for Rural PA report has good data: [Differences in Rural and Urban PA 529 Education Savings Accounts, 2018-2022 \(patreasury.gov\)](#)

County level data on Treasury website - [Pennsylvania Treasury Transparency Portal \(patreasury.gov\)](#)

26. What percentage of the paid media budget do they envision going toward the major metro and rural media markets?

We currently employ a 60 (rural) / 40 (metro) split for paid media. However, this overall allocation may tilt in the other direction when we layer in direct mail, etc.

27. Are sponsorships included in this scope?

Direct costs of sponsorships should not be included, but costs to propose, evaluate, and manage sponsorships should be included.

28. How does the feedback and approval process work from their end? How much lead time is needed for things to be reviewed?

It is expected that PA Treasury will receive content, a minimum of two weeks ahead of established deadlines, to review and approve for appropriate changes.

29. How much data can they provide to help us understand existing and potential target audiences?

The Center for Rural PA report has good data: [Differences in Rural and Urban PA 529 Education Savings Accounts, 2018-2022 \(patreasury.gov\)](#)

County level data on Treasury website - [Pennsylvania Treasury Transparency Portal \(patreasury.gov\)](#)

30. What factors will help you know if we're the right agency for your needs? Values, turnaround time, budget, or something else?
Factors Treasury will consider include the quality of prior engagements, cost, timeliness, and understanding and commitment to Treasury products and services.
31. Are there any current branding materials we will need to use (brand guidelines, logo, etc)?
Yes, this would be provided to selected vendor.
32. What other information would you like to see outside of the example provided in our response to this RFQ?
None
33. By chance, was the pre-bid conference that was held last Thursday recorded?
The Pre-Bidders Conference on 1/25/24 was not recorded.

