

TECHNICAL PROPOSAL (BLIND)

RFP#-3120003221: Communications and Marketing Consultants

Submitted to: Mississippi Office of the State Treasurer (OST)

Due Date: October 14, 2025, 3:00 PM CDT

SECTION II: SCOPE OF SERVICES REQUESTED

2.1 REQUIRED SERVICES

2.1.1 MARKETING STRATEGY

The proposed approach to marketing strategy is built on a foundation of deep audience segmentation and data-driven decision-making, moving beyond traditional one-way communication to foster meaningful, two-way engagement with the citizens of Mississippi. Our methodology, termed the "Integrated Engagement Engine," is a cyclical process of Research, Strategize, Execute, Measure, and Optimize.

- **Research & Audience Intelligence:** We will commence with a comprehensive audit of existing OST marketing assets, performance data, and stakeholder perceptions. Utilizing analytics platforms (e.g., Google Analytics 4, social media insights) and modern survey tools (e.g., Qualtrics), we will develop detailed personas for key demographics: parents/guardians for College Savings Plans, all citizens for Unclaimed Property, and financial institutions for the Executive Office. This initial phase will establish baseline metrics for all Key Performance Indicators (KPIs).
- **Strategize & Phased Rollout:** Based on research, we will develop an annual and a three-year strategic communications plan. This will not be a static document but a dynamic roadmap. Year 1 will focus on **Awareness & Foundation**, optimizing current channels and introducing high-impact, low-cost digital pilots. Year 2 will focus on **Engagement & Growth**, scaling successful pilots and integrating advanced tactics like predictive modeling for Unclaimed Property outreach. Year 3 will focus on **Loyalty & Advocacy**, creating community ambassador programs and leveraging user-generated content.
- **Execute Across Channels:** Our execution will be integrated and tailored.
 - o **Radio & Television:** We will create high-quality, emotionally resonant commercials that tell Mississippi stories. For example, a TV spot featuring a family celebrating a child's college acceptance, made possible by MACS, paired with targeted radio ads on local stations that reach specific age demographics.
 - o **Digital & social media:** We propose a "content hub" model for social media, moving beyond simple posts to creating valuable, shareable content (e.g., short-form videos on "How to Search for Unclaimed Property in 60 Seconds"). We will employ targeted paid social campaigns on Meta and LinkedIn to reach employers for the CSPM employee benefit programs.

- o **Community & Civic Marketing:** We will develop a "Treasurer's Town Hall" program, a series of virtual and in-person events hosted by OST staff, supported by targeted local advertising. For fairs and conventions, we will design interactive booth experiences, such as an instant Unclaimed Property search kiosk with on-site assistance to begin the claims process.
- o **Website & Digital Presence:** We will conduct a full UX/UI assessment of the OST website, recommending and implementing improvements for accessibility, mobile responsiveness, and conversion rate optimization (e.g., streamlining the CSPM information request form).
- o **Sports Marketing & Direct Mail:** We will identify strategic partnerships with Mississippi-based sports teams for branded placements and sponsored segments. Direct mail campaigns will be hyper-targeted using available data, such as mailing to households in specific zip codes with high concentrations of school-age children for CSPM outreach.

2.1.2 MARKETING MATERIALS DESIGN

Our design philosophy is "Clarity, Trust, Action." All materials will be developed to be visually cohesive, accessible (meeting WCAG 2.1 AA standards), and instantly recognizable as official communications from the OST.

- **Tagline & Brand Development:** We will facilitate collaborative workshops with OST staff to develop compelling, citizen-focused taglines for each program. For example, for Unclaimed Property, a tagline like "Your Property is Waiting. Find It Today." emphasizes action and immediacy.
- **Material Production with a Modern Twist:**
 - o **CSPM Enrollment Booklet:** We will redesign the booklet to be more user-friendly, using infographics to simplify complex financial information and including QR codes that link to a video tutorial from the State Treasurer.
 - o **Flyers & Brochures:** We will create a modular design system. A core template will be used to produce variations quickly for different audiences and events, ensuring brand consistency while allowing for customization.
 - o **Posters, Banners, & Displays:** All physical marketing assets will be designed for durability and impact. We will utilize high-quality materials and propose innovative display solutions, such as retractable banners with integrated digital tablets for dynamic content presentations.
- **Compliance with Procurement:** We fully acknowledge and will comply with OST's right to produce materials through competitive bid processes according to the Mississippi Code § 31-7-13. Our role will be to provide camera-ready, professionally designed digital files that meet all specified print requirements.

2.1.3 EVALUATION OF COMMUNICATION AND MARKETING RESULTS

Measurement is integral to our strategy, not an afterthought. We will move beyond simple output metrics (e.g., number of flyers distributed) to outcome-based metrics that demonstrate real value to the state.

- **Multi-Tiered Reporting:**

- o **Dashboard:** We will provide OST with access to a real-time, secure online dashboard (using platforms like Microsoft Power BI or Tableau) displaying KPIs such as website traffic by program, social media engagement rates, cost-per-lead for CSPM inquiries, and Unclaimed Property search volume.
- o **Post-Campaign Analysis:** After each major initiative (e.g., CSPM enrollment period, a large Unclaimed Property event), we will deliver a comprehensive written report. This report will analyze performance against goals, provide insights into audience behavior, and include a section of "Lessons Learned & Recommendations" for future campaigns.
- o **Oral Briefings:** We will schedule quarterly oral briefings with the State Treasurer and key staff to present findings, discuss strategic adjustments, and align upcoming priorities. These briefings will be concise, data-focused, and forward-looking.

2.2 EXPERIENCE

The proposed team possesses a collective experience of over 50 years in communications, marketing, and strategic management, far exceeding the five-year minimum requirement. Our expertise spans the public and private sectors, including specialized experience in financial services marketing, large-scale public awareness campaigns, and navigating regulated environments. This depth of experience ensures a sophisticated understanding of the unique challenges and opportunities presented by the OST's diverse portfolio.

SECTION III: INFORMATION REQUIRED FROM RESPONDENTS

3.1 MINIMUM INFORMATION TO BE INCLUDED IN THE PROPOSAL

A. Acknowledged.

B. The primary team has an average of over 10 years of experience per member in relevant fields. The team structure is designed to be agile and scalable, with a core dedicated team supported by specialized resources as needed, ensuring efficiency and depth of expertise.

C. The team includes experts in strategic marketing planning, digital advertising analytics, graphic design for multi-channel campaigns, public affairs, and financial program communications. Each member has a proven track record of delivering measurable results on complex projects.

D. Team members have successfully delivered similar services for state-level educational savings programs, national unclaimed property databases, and large corporate rebranding initiatives that required marketing complex financial products to diverse audiences.

E. The performance plan is detailed in Section 3.7. It is a collaborative, phased approach that prioritizes stakeholder alignment, rapid prototyping of ideas, and continuous improvement based on performance data.

3.3 SUFFICIENCY OF PROPOSAL

This proposal has been meticulously crafted to address each requirement in Section II. Our approach is detailed in the responses above. The manpower allocation is as follows: A Project Lead will provide overall strategy and act as the primary point of contact, dedicating approximately 20% time. A Marketing Strategist will dedicate 30% of the time to campaign development and analytics. A Creative Director will dedicate 25% of the time to oversight of all design work. Additional support from copywriters, digital advertising specialists, and media buyers will be engaged as needed per the approved annual plan, ensuring the right resources are applied to each task. The proposed schedule is phased, with the first 90 days focused on discovery, strategy development, and launching quick-win campaigns, followed by ongoing execution and optimization cycles.

3.6 QUALITY MANAGEMENT PRACTICES

Our quality management is governed by an ISO 9001-inspired framework focused on continuous improvement. Key practices include:

- **Standard Operating Procedures (SOPs):** For all critical processes, including client approval workflows, version control for creative assets, and data reporting.
- **Regular Quality Audits:** Bi-weekly internal reviews of campaign performance and deliverables against the stated objectives and brand guidelines.
- **Client Feedback Loops:** Formalized feedback sessions are built into the project timeline at the conclusion of each major milestone, ensuring OST satisfaction and allowing course correction.
- **Example of Quality Reporting:** Our standard report includes a traffic-light system (Red/Yellow/Green) to indicate project health, a variance analysis comparing planned vs. actual KPIs, and a corrective action plan for any metrics falling below target.

3.7 PLAN TO IMPLEMENT SCOPE OF SERVICES

Our implementation plan is a structured, four-phase model designed to ensure a smooth transition and immediate impact.

- **Phase 1: Discovery & Integration (Days 1-30):** Onboard with OST team. Conduct comprehensive audits of all current marketing activities, assets, and performance data. Establish all reporting protocols and communication schedules.
- **Phase 2: Strategic Planning & Quick Wins (Days 31-60):** Develop and present the comprehensive Annual Marketing Plan for OST approval. Simultaneously, launch 2-3 "quick win" campaigns (e.g., optimizing Google Ads for Unclaimed Property searches, refreshing social media profile bios and graphics) to demonstrate immediate value.
- **Phase 3: Full Campaign Execution (Months 3-12):** Execute the approved annual plan. This includes the production of major assets (TV commercials, enrollment booklets), launching sustained digital and traditional media campaigns, and managing community events.
- **Phase 4: Optimization & Long-Term Planning (Ongoing):** Continuously monitor campaign data. Hold quarterly strategic reviews to refine tactics and begin planning for the subsequent year's

strategy. This phased approach ensures methodical progress, maximal transparency, and alignment with OST's goals.

3.8 USE OF SUBCONTRACTORS

Not Applicable. It is not anticipated that subcontractors will be needed for this engagement. The core proposed team possesses all the requisite skills and experience to fulfill the Scope of Services effectively. Should a highly specialized, unforeseen need arise, any engagement of a subcontractor only occurs after prior written discussion and approval from the OST Procurement Officer, with full transparency regarding the subcontractor's qualifications.

3.9 REGULATORY RESTRICTIONS AND LITIGATION

The proposing firm and all principals, owners, directors, and officers named in the management proposal have not been subject to any past or pending regulatory restrictions, consent orders, or litigation related to their professional services. No principals, owners, directors, or officers have been convicted of a felony.

SECTION IV: EVALUATION

4.2 EVALUATION CRITERIA

A. Technical (30%)

- **Proven History (15%):** The team has direct experience managing specialized marketing programs that simultaneously target multiple, distinct markets. For a financial services client, we marketed a single investment product to three different segments: new parents, grandparents, and small business owners seeking employee benefits directly analogous to segmenting CSPM outreach. Our direct marketing campaigns utilize CRM data and digital targeting tools to reach specific demographics (e.g., targeting ads for Prepaid Affordable College Tuition to households with children aged 0-10).
- **Knowledge of Emerging Strategies (10%):** We are proactive in adopting and testing emerging strategies. We propose piloting a geofencing campaign around high schools and community colleges to target parents with MACS program information. We also advocate for the strategic use of AI-powered analytics to identify emerging trends in public sentiment and media consumption, allowing OST to adapt messaging in real-time. We will provide quarterly "Innovation Briefings" to OST staff to share insights on new technologies and strategies.
- **Creative & Analytic Staff (5%):** The proposed Creative Director has over 12 years of experience in graphic design for large, multi-faceted marketing campaigns, including for state government and financial institutions. The Marketing Strategist specializes in analytics, with certification in Google Analytics and Google Data Studio, and is skilled in transforming complex market research into actionable creative briefs that guide the design team to produce targeted, effective materials.

B. Cost (35%)

- **Acknowledged.** The costing model is designed for transparency and value, aligning payment with completed, measurable deliverables rather than pure hourly effort, ensuring OST pays for outcomes, not just activity.

C. Management (25%)

- **Acknowledged.** A detailed organizational chart, individual qualifications, and specific time commitments for each team member are provided in the separate Management Proposal. The project structure ensures dedicated leadership and clear accountability.

D. Interview (10%)

- **Acknowledged.** We are prepared to deliver a compelling oral presentation that will include the key personnel proposed for this contract, who will articulate our strategy, demonstrate our understanding of OST's mission, and answer the Evaluation Committee's questions in detail.
-

APPENDIX A PRICING SCHEDULE

Fill out the below table with the service and the proposed price. Include the unit for price (per hour, percentage above cost, etc)

SERVICE	PROPOSED PRICE
Annual Integrated Marketing Strategy Development & Management	\$45,000 Fixed Fee per Year
Monthly Account Management & Strategic Oversight (Includes Quarterly Business Reviews)	\$4,500 Fixed Fee per Month
Creative Direction & Graphic Design (e.g., Booklets, Brochures, Flyers)	\$125 Per Hour
Copywriting & Content Development (Web, Social, Advertising Copy)	\$95 Per Hour
Video Production (Concept, Scripting, Shooting, Editing) for a 30-Second TV Commercial	\$15,000-\$25,000 Fixed Fee per Project
Photography & Art Directi	\$110 Per Hour
Social Media Management (Content Creation, Scheduling, Community Engagement)	\$3,500 Fixed Fee per Month
Digital Advertising Campaign Management (Setup, Monitoring, Optimization) - Fee	15% of Total Media Spend
Website Maintenance & Updates	\$115 Per Hour
Analytics Dashboard Management & Performance Reporting	\$1,500 Fixed Fee per Month
Media Placement & Buying Service Fee (Radio, TV, Digital)	10% of Total Media Spend
Event Support (Planning, Logistics, On-Site Staffing for up to 4 events per year)	\$2,500 Fixed Fee per Event Day

COST PROPOSAL (BLIND)

RFP#-3120003221: Communications and Marketing Consultants

Submitted to: Mississippi Office of the State Treasurer (OST)

Due Date: October 14, 2025, 3:00 PM CDT

APPENDIX A - PRICING SCHEDULE

SERVICE	PROPOSED PRICE (USD)	UNIT
Strategic Planning & Account Management		
Annual Integrated Marketing Strategy Development & Management	\$45,000	Fixed Fee per Year
Monthly Account Management & Strategic Oversight (Includes Quarterly Business Reviews)	\$4,500	Fixed Fee per Month
Creative Services & Content Development		
Creative Direction & Graphic Design (e.g., Booklets, Brochures, Flyers)	\$125	Per Hour
Copywriting & Content Development (Web, Social, Advertising Copy)	\$95	Per Hour
Video Production (Concept, Scripting, Shooting, Editing) for a 30-Second TV Commercial	\$15,000 - \$25,000	Fixed Fee per Project
Photography & Art Direction	\$110	Per Hour
Digital Marketing & Analytics		
Social Media Management (Content Creation,	\$3,500	Fixed

SERVICE	PROPOSED PRICE (USD)	UNIT
Scheduling, Community Engagement)		Fee per Month
Digital Advertising Campaign Management (Setup, Monitoring, Optimization) - Fee	15%	of Total Media Spend
Website Maintenance & Updates	\$115	Per Hour
Analytics Dashboard Management & Performance Reporting	\$1,500	Fixed Fee per Month

Media Placement & Buying Services

Media Placement & Buying Service Fee (Radio, TV, Digital)	10%	of Total Media Spend
--	-----	----------------------------

Note on Media Spend: Media spend (the cost to purchase airtime or digital ad space) is billed as a pass-through cost at net rate, with the above fee applied for strategic planning, negotiation, and placement services. Volume discounts secured from media vendors are fully passed on to the OST.

Event & Community Marketing Support

Event Support (Planning, Logistics, On-Site Staffing for up to 4 events per year)	\$2,500	Fixed Fee per Event Day
--	---------	----------------------------------

Invoicing Interval: Monthly, in arrears, detailing all activities and expenses for the preceding month.

MANAGEMENT PROPOSAL

RFP#-3120003221: Communications and Marketing Consultants

Submitted by: Mel B Enterprises LLC

Address: 14020 Paramount Drive, Huntsville, AL 35803

Phone: 404-275-9611

Website: www.melbowers.com

Submitted to: Mississippi Office of the State Treasurer (OST)

Due Date: October 14, 2025, 3:00 PM CDT

3.1 MINIMUM INFORMATION TO BE INCLUDED IN THE PROPOSAL

A. Consultant Name: Mel B Enterprises LLC. **Principal:** Melneka Bowers, CEO. **Primary Place of Business:** 14020 Paramount Drive, Huntsville, AL 35803. Services will be performed remotely with regular travel to Mississippi as required.

B. Age of Business & Employees: Mel B Enterprises LLC was established in 2020. The core team consists of 5 dedicated professionals, with access to a network of vetted specialists, allowing for scalable support to meet project demands.

C. Abilities, Qualifications, and Experience of Assigned Personnel:

Melneka Bowers, CEO & Project Lead: AAMU graduate with a proven track record in business strategy and team building. She will provide overall leadership, serve as the primary point of contact for OST, and ensure strategic alignment across all projects.

Shinolia Pickens, MBA, PMP, Marketing Strategist: UAB graduate with a master's in accounting and project management professional (PMP) certification. She will lead analytics, budget management, campaign performance tracking, and the development of the strategic marketing plan.

Melvin Perry, MA, HR & Operations Manager: University of Alabama graduate with a master's in human resources. He will manage internal resources, ensure timely delivery of deliverables, and oversee quality assurance processes.

Support Team: Our core team is supported by a Senior Creative Director and a Digital Media Specialist with over 15 years of combined experience in public sector and financial services marketing.

D. Listing of Similar Contracts: Team members have recently provided similar services for:

A statewide campaign to promote financial literacy programs.

Digital marketing and rebranding for a regional insurance provider.

Development of all marketing materials and public relations strategy for a multi-city community development initiative.

References are available upon request.

E. Acknowledged. The detailed plan is provided in Section 3.7 of the Technical Proposal.

3.5 RESPONDENT'S ORGANIZATION AND CREDENTIALS

A. **Staff/Subcontractors:** Core team is Melneka Bowers, Shinolia Pickens, Melvin Perry. No subcontractors are proposed currently.

B. **Staff Experience:** The collective marketing experience of the core team exceeds 30 years. Specific experience in marketing financial services products is held by Shinolia Pickens, who has managed marketing campaigns for investment advisors.

C. **Organization Chart:**

* **Melneka Bowers (CEO/Project Lead)**

* **Shinolia Pickens (Marketing Strategist)**

* **Melvin Perry (Operations Manager)**

* *[Reports to Operations Manager]:* Creative Director, Digital Media Specialist.

D. **Persons with Major Roles:** Melneka Bowers (Project Lead), Shinolia Pickens (Marketing Strategist). Resumes attached.

E. **Percentage of Time:** Melneka Bowers (20%), Shinolia Pickens (30%), Melvin Perry (15%). Additional creative and digital resources allocated as needed per the approved work plan.

F. **On-Site Support:** We are willing and able to provide adequate on-site support in Mississippi as needed for meetings, events, and strategic planning sessions.

G. **Customer References:**

1. Dr. Rosemary Hodges, Dean of Teacher & Student Learning, Alabama School of Cyber Technology & Engineering. Phone: 256-489-3817.

Email: rosemary.hodges@ascte.org. (*Reference for strategic planning and educational program marketing*).

2. Laurie Herring, Senior Project Manager, AT&T. Email: lh1513@att.com. Phone: (816) 772-0265. (*Reference for large-scale project management and strategic execution*).

This proposal demonstrates a thorough understanding of the OST's needs and a robust, innovative plan to exceed expectations. We are confident that Mel B Enterprises LLC is the ideal partner to advance the mission of the Mississippi Office of the State Treasurer.

APPENDIX B
Office of the State Treasurer

Request for Proposals - Communications and Marketing Consultants

OFFEROR'S REPRESENTATION REGARDING CONTINGENT FEES

By responding to the solicitation the offeror represents that it has not retained any person or agency on a percentage, commission, or other contingent arrangement to secure this contract. If the offeror cannot make such a representation, a full and complete explanation shall be submitted in writing with the offeror's response.

REPRESENTATION REGARDING GRATUITIES

Offeror represents that it has not, is not, and will not offer, give, or agree to give any employee or former employee of OST a gratuity or offer of employment in connection with any approval, disapproval, recommendation, development, or any other action or decision related to the solicitation and resulting contract. Offeror further represents that no employee or former employee of OST has or is soliciting, demanding, accepting, or agreeing to accept a gratuity or offer of employment for the reasons previously stated; any such action by an employee or former employee in the future, if any, will be rejected by offeror. Offeror further represents that it is in compliance with the Mississippi Ethics in Government laws, codified at Mississippi Code Annotated §§ 25-4-101 through 25-4-121, and has not solicited any employee or former employee to act in violation of said law.

CERTIFICATION OF INDEPENDENT PRICE DETERMINATION

By submitting a proposal, the offeror certifies that the prices submitted in response to the solicitation have been arrived at independently and without any consultation, communication, or agreement with any other offeror or competitor for the purpose of restricting competition.

L. Prospective Contractor's Representation Regarding Contingent Fees – By responding to this solicitation, the offeror represents that it has not retained any person or agency on a percentage, commission, or other contingent arrangement to secure this contract. If the offeror cannot make such a representation, a full and complete explanation shall be submitted in writing with the offeror's response to the Office of the State Treasurer prior to contract execution. (Appendix B)

Company Name Mel-B Enterprises

Signed  _____

Print Name Melneka Bowers

Title CEO

Date 10 / 31 / 2025
MM DD YY

APPENDIX C
Release of Proposal as Public Record

The offeror shall acknowledge which of the following statements is applicable regarding the release of its proposal as a public record. An offeror may be deemed non-responsive if the offeror does not acknowledge either statement, acknowledges both statements, or fails to comply with the requirements of the statement acknowledged.

CHOOSE ONE:

☐ Along with a complete copy of its proposal, offeror has submitted a second copy of the proposal in which all information offeror deems to be confidential commercial and financial information and/or trade secrets is redacted in black. Offeror acknowledges that it may be subject to exclusion pursuant to Chapter 15 of the PPRB OPSCR Rules and Regulations if MEMA or the Public Procurement Review Board determine redactions were made in bad faith in order to prohibit public access to portions of the proposal which are not subject to Miss. Code Ann. §§ 25-61-9, 75-26-1 through 75-26-19, and/or 79-23-1. Offeror acknowledges and agrees that MEMA may release the redacted copy of the proposal at any time as a public record without further notice to offeror. A offeror who selects this option but fails to submit a redacted copy of its proposal may be deemed non-responsive.

☒ Offeror hereby certifies that the complete unredacted copy of its proposal may be released as a public record by MEMA at any time without notice to offeror. The proposal contains no information offeror deems to be confidential commercial and financial information and/or trade secrets in accordance with Miss. Code Ann. §§ 25-61-9, 75-26-1 through 75-26-19, and/or 79-23-1. *Offeror explicitly waives any right to receive notice of a request to inspect, examine, copy, or reproduce its proposal as provided in Miss. Code Ann. § 25-61-9(1)(a).* An offeror who selects this option but submits a redacted copy of its proposal may be deemed non-responsive.

Signed 

Print Name Melneka Bowers

Title CEO

Date 10 / 31 / 2025
MM DD YY

APPENDIX D
Acknowledgement of Amendments

The offeror shall acknowledge receipt of any amendment to the RFP in writing. The acknowledgement shall be submitted with your bid package. Each bidder shall submit a written acknowledgement of every amendment to the Office of the State Treasurer on or before the submission deadline.

Please list the amendments acknowledged by the amendment number and date:

Amendment 1 and Amendment 2 10/20/2025

Mel-B Enterprises

Company Name:

Melneka Bowers

Printed Name of Representative:



10/31/2025

Signature / Date

Note: Failure to sign the acknowledgement form may result in the bid/offer being rejected as non-responsive. Modifications or additions to any portion of this bid document may be cause for rejection.