



Technical Proposal for:

The Mississippi Office of the State Treasurer (OST) –
Communications and Marketing Consultants

RFP# - 3120003221

Submitted by:



Date: September 23, 2025



Acknowledgement of RFP Requirements

The Respondent affirms that all instructions and conditions outlined in the RFP have been reviewed thoroughly and will be fully complied with. This includes the structure of three separate proposals, adherence to deadlines, submission of appendices, and strict alignment with the stated sequence of requirements. The Respondent acknowledges that each provision in Sections I through V has been carefully considered and will be addressed in detail throughout this proposal. By explicitly stating “Acknowledged” to each requirement, the Respondent confirms its intent to comply with all mandatory specifications and expectations.



Scope of Services

1. Marketing Strategy

Precision Consulting will collaborate directly with OST staff to design, implement, and evaluate a coordinated statewide marketing and communications strategy tailored to the Treasurer's Office, its Executive Office, and programs such as the College Savings Plans of Mississippi (CPSM) and the Unclaimed Property Initiative. Our approach emphasizes both reach and precision, using targeted campaigns that connect with Mississippi residents across diverse demographics while ensuring compliance with OST requirements. The core elements of this strategy include:

a) Radio and Television Advertising

Radio and television remain among the most effective channels for reaching Mississippi residents across generational and geographic lines, particularly given the state's significant rural population and its reliance on broadcast media. Precision Consulting recognizes that OST requires not only broad coverage but also carefully crafted, technically sound campaigns that resonate with families evaluating financial programs such as CPSM, MACS, and the Unclaimed Property Initiative. Our team will manage the full production and placement cycle, ensuring that each broadcast asset is professionally executed, compliant with OST approval standards, and optimized for measurable impact. The elements of this service include:

- **Script Development and Messaging Alignment:** We will draft radio and television scripts that communicate complex program benefits in clear, relatable language. Each draft will be reviewed with OST staff to ensure alignment with approved terminology, branding, and compliance requirements. Scripts will highlight key seasonal messages, such as CPSM enrollment deadlines or annual Unclaimed Property awareness events, ensuring OST's communications calendar is fully supported.
- **Creative Production and Technical Execution:** Precision will oversee talent casting, voiceover recording, set design, and editing, leveraging in-state studios when possible to enhance local resonance. For television, our production teams will incorporate motion graphics, OST branding elements, and testimonials from Mississippi families to humanize



financial messaging. Radio ads will be mixed and mastered to industry broadcast standards, ensuring clarity and consistency across different listening environments.

- **Media Planning and Placement:** Campaign airtime will be purchased strategically to maximize cost efficiency and audience reach. Precision will negotiate with Mississippi-based television and radio networks, targeting prime slots during family-oriented programming, evening news broadcasts, and drive-time radio segments. Placement strategies will account for demographic diversity, ensuring coverage across urban centers and rural counties alike.
- **Compliance and OST Oversight:** No advertisement will be released without OST review and written approval. All production scripts, storyboards, and sample recordings will be submitted in advance, ensuring OST maintains full oversight of content accuracy and program representation.
- **Performance Tracking and Evaluation:** Beyond distribution, Precision will provide post-campaign analytics, including gross rating points (GRPs), estimated audience reach, and cost-per-impression calculations. These metrics will be integrated into OST's quarterly reporting requirements, offering evidence of campaign effectiveness and guiding future adjustments.

This comprehensive, hands-on approach ensures that OST's radio and television advertising campaigns are not only creative and persuasive but also strategically targeted, cost-effective, and fully accountable to state oversight requirements.

b) Internet Marketing Campaigns

Digital platforms are critical for extending OST's reach to younger families, college-bound students, and working professionals who rely on online channels for financial decision-making. Precision Consulting will design, execute, and continuously optimize internet marketing campaigns that highlight the benefits of CPSM, MACS, and the Unclaimed Property Initiative. Our strategy ensures that each digital dollar is spent efficiently and generates measurable engagement aligned with OST's program goals. The components of this service include:



- **Targeted Digital Advertising:** Precision will deploy paid search ads on platforms such as Google and Bing to capture high-intent users searching for college savings, financial planning, or unclaimed property resources in Mississippi. Social media advertising will be tailored to different platforms, Facebook and Instagram for family outreach, LinkedIn for employer-focused messaging, and YouTube for video storytelling. Each campaign will be geofenced to Mississippi to ensure resources are concentrated where they will have the greatest impact.
- **Program-Specific Microsites and Landing Pages:** To streamline user journeys, we will design OST-branded microsites or landing pages dedicated to individual campaigns (e.g., “Enroll in CPSM Today” or “Check Your Unclaimed Property”). Each page will feature clear calls to action, mobile-friendly design, and analytics tracking to measure traffic, conversions, and drop-off rates. These sites will complement the main OST website while providing campaign-specific tracking data.
- **Analytics-Driven Optimization:** Precision’s analysts will use advanced tools, including Google Analytics, Tableau dashboards, and proprietary predictive modeling, to track user engagement in real time. Metrics such as click-through rates, cost-per-acquisition, bounce rates, and geographic response distribution will be monitored daily. This allows campaigns to be adjusted mid-flight to maximize return on investment and ensure OST consistently meets outreach benchmarks.
- **Seasonal and Event-Based Campaigns:** We will align internet campaigns with OST’s program calendar. For example, during CPSM enrollment periods, digital messaging will emphasize deadlines and savings benefits, while Unclaimed Property campaigns will focus on awareness weeks and state fairs. This synchronization ensures OST messaging is both timely and relevant to citizens’ decision-making cycles.
- **Content Compliance and Review:** All copy, graphics, and video content will be reviewed by OST before launch to ensure accuracy, clarity, and compliance with state requirements. OST will retain full authority to approve or reject creative materials, ensuring complete alignment with agency standards.



- **Reporting and Continuous Improvement:** Precision will provide OST with detailed monthly reports showing impressions, engagement rates, and conversion outcomes. These reports will include recommendations for adjusting targeting, creative content, or budget allocations, ensuring continuous improvement in campaign performance.

Through this structured approach, OST will be equipped with a powerful digital communications framework that not only raises awareness but also drives measurable actions, such as CPSM enrollments and unclaimed property claims, across Mississippi.

c) Community and Employer Outreach

Community-based and employer-focused outreach ensures that OST's programs move beyond awareness campaigns and into the daily lives of Mississippians. Precision Consulting will design localized strategies to connect CPSM, MACS, and the Unclaimed Property Initiative directly with civic leaders, schools, churches, and employers who influence financial decisions at the family and community level. This approach ensures that OST programs are not only visible but actively integrated into trusted community and workplace structures. The components of this service include:

- **Civic and Community Partnerships:** Precision will coordinate presentations, workshops, and information sessions with civic organizations, faith-based groups, and local nonprofits across Mississippi. These sessions will include OST-approved materials explaining CPSM enrollment, MACS benefits, and how to search for unclaimed property. By leveraging trusted community networks, OST messaging will reach citizens who may be less likely to respond to traditional advertising alone.
- **School and College Engagement:** Because many CPSM and MACS beneficiaries are parents of school-aged children or college-bound students, Precision will develop tailored outreach for PTAs, school districts, and local colleges. Materials will include brochures distributed during school events and financial aid nights, as well as digital toolkits provided to school administrators. These efforts will normalize college savings programs as part of household financial planning.



- **Employer-Based Promotion:** Precision will partner with Mississippi employers to promote CPSM and MACS as workplace benefits. This will include developing payroll-deduction informational flyers, HR communication templates, and hosting lunchtime informational sessions for employees. Employers will be provided with OST-branded toolkits that make it easy to incorporate college savings promotions into their internal benefit communications.
- **Localized Messaging:** Outreach materials will be customized to reflect the demographic and economic realities of different regions in Mississippi. For example, rural outreach may emphasize in-person town hall-style events, while urban centers may benefit from QR-code-driven flyers distributed through large employers. Precision will ensure that messaging resonates with the specific needs and cultural contexts of local communities.
- **Community Event Support:** Precision will manage OST's presence at regional fairs, association meetings, and grassroots events. Our team will provide branded materials such as banners, booth setups, and digital displays. Staff support will be available for in-person engagement, ensuring OST representatives are equipped with professional resources to answer questions and drive enrollments or property searches.
- **Performance Measurement:** Each community and employer outreach initiative will include post-event surveys, attendance counts, and follow-up engagement tracking. This data will be consolidated into quarterly reports for OST, providing insight into which communities or employer partnerships generate the highest engagement and enrollment results.

By embedding OST's messaging within trusted community and workplace channels, Precision ensures that CPSM, MACS, and Unclaimed Property programs are not only advertised but endorsed by local leaders and institutions Mississippians already rely upon.

d) Event Marketing and Displays

Public events provide an invaluable opportunity for OST to engage Mississippians face-to-face, offering not only visibility but also interactive learning about CPSM, MACS, and the Unclaimed Property Initiative. Precision Consulting will design, coordinate, and manage OST's presence at



conventions, association meetings, state fairs, and other high-traffic gatherings. Our role is to ensure that every event conveys professionalism, accessibility, and strong branding, while generating measurable outcomes in terms of engagement and program awareness. The specific components of this service include:

- **Custom Booth and Display Design:** Precision will create branded booths, display stands, and banners that visually reinforce OST's identity. Booths will be designed to be modular, ensuring flexibility for different event sizes, from small community fairs to large statewide conventions. Displays will include QR codes linked to CPSM enrollment portals and the Unclaimed Property database, making it easy for attendees to take immediate action.
- **Interactive Materials and Demonstrations:** To make OST programs approachable, we will provide interactive elements at each booth. Examples include touchscreen kiosks where citizens can search for unclaimed property in real time, as well as animated explainer videos highlighting CPSM savings benefits. By engaging visitors in hands-on experiences, we increase the likelihood of program participation.
- **On-Site Staffing and Support:** Precision will supply trained staff to set up displays, manage logistics, and assist OST representatives during events. Staff will be trained in OST-approved talking points to ensure accuracy and consistency when discussing programs. This support enables OST's own personnel to focus on higher-value interactions, such as answering technical questions or connecting with community leaders.
- **Targeted Event Selection:** Working with OST, we will identify priority events where CPSM and Unclaimed Property messaging will have the greatest impact. For instance, benefits fairs at major Mississippi employers are ideal for promoting CPSM as an employee savings tool, while county fairs and local markets are well-suited for unclaimed property searches. Precision will maintain a rolling calendar of such events to maximize exposure throughout the year.
- **Logistical Management:** Precision will handle end-to-end logistics, including booth transportation, assembly, dismantling, and storage between events. We will also coordinate



with event organizers on requirements such as electrical hookups, internet access, and ADA compliance to ensure smooth operations.

- **Outcome Measurement:** After each event, Precision will prepare short reports summarizing attendance estimates, the number of direct interactions, CPSM enrollment inquiries, and unclaimed property searches initiated at the booth. These reports will be consolidated into OST's quarterly marketing performance updates to ensure accountability and continuous improvement.

By transforming OST's presence at public events into an interactive and data-driven outreach mechanism, Precision ensures that in-person engagement directly translates into measurable outcomes, more families enrolling in college savings programs and more citizens reclaiming property owed to them.

e) Executive Office Communications and Media Relations

The Office of the State Treasurer (OST) requires a communications partner that can protect and elevate the Treasurer's public voice while ensuring consistency across all channels. Precision Consulting will serve as an extension of the Executive Office, providing structured support in media relations, public affairs, and strategic messaging. Our role will ensure that every public-facing statement, press release, or media interaction reflects OST's mission and builds confidence among Mississippi citizens. The components of this service include:

- **Media Relations and Press Support:** Precision will draft, edit, and distribute press releases, media advisories, and talking points for the Treasurer's Office. Each communication will be reviewed and approved by OST before release, ensuring compliance with agency standards and state regulations. We will maintain a media contact database specific to Mississippi outlets, covering television, radio, print, and online platforms, so that messages consistently reach the widest and most relevant audiences.
- **Proactive Public Affairs Management:** Beyond responding to inquiries, Precision will help OST shape the public agenda by planning proactive announcements and campaigns. For example, we will coordinate statewide press coverage during CPSM enrollment windows, using earned media to complement paid campaigns. Similarly, for the Unclaimed



Property Initiative, we will design press events that highlight stories of Mississippi families reclaiming lost assets, thereby increasing trust and program participation.

- **Rapid Response and Issues Management:** Precision will implement protocols for monitoring media coverage and public sentiment regarding OST programs. In the event of misinformation, negative press, or urgent news cycles, we will draft rapid response statements and coordinate with OST leadership to ensure swift, accurate, and professional communications. This guarantees that OST maintains control of its narrative in both routine and crisis situations.
- **Executive Speechwriting and Messaging:** Our team will provide speechwriting and briefing materials for the State Treasurer and senior staff, ensuring consistency of tone and alignment with OST's strategic goals. Materials will be tailored to the audience and context, whether addressing the Mississippi legislature, civic organizations, or national financial forums.
- **Training and Capacity Building:** Precision will deliver media training sessions for OST-designated spokespersons, focusing on interview techniques, message discipline, and handling challenging questions. This training ensures OST staff can represent the office effectively during live interviews, press conferences, and community events.
- **Performance Reporting:** All media relations efforts will be tracked through metrics such as earned media value, reach, and sentiment analysis. Precision will provide quarterly reports that summarize coverage volume, tone, and geographic reach, enabling OST to evaluate the effectiveness of its Executive Office communications strategy.

Through these measures, Precision will safeguard OST's credibility, proactively amplify its achievements, and ensure consistent, professional messaging across all public affairs activities.

2. Marketing Materials Design

Effective marketing materials are central to OST's ability to raise awareness, guide citizens through enrollment processes, and maintain consistent statewide branding. Precision Consulting will work hand-in-hand with OST staff to design and produce collateral that is visually engaging,



factually accurate, and compliant with Mississippi state requirements. Every product will be tailored to specific programs such as CPSM, MACS, and the Unclaimed Property Initiative, ensuring that each audience segment receives information that is relevant and accessible. Our deliverables include:

a) Enrollment Booklets

Enrollment booklets are one of the most critical communication tools for OST because they provide families with a comprehensive reference for understanding CPSM and MACS. Unlike flyers or advertisements, these booklets must balance accessibility with technical accuracy, ensuring that prospective participants can easily complete the enrollment process while remaining fully informed of program terms and disclosures. Precision Consulting will design these booklets to serve both as a recruitment tool and as a compliance document, meeting OST's requirement for professional, accessible guides that simplify enrollment for Mississippi residents.

- **Clear Instructions and Visual Design:** Each enrollment booklet will include step-by-step instructions that explain how to apply, what supporting documents are required, and how to calculate contributions. To improve usability, Precision will integrate infographics, checklists, and flowcharts that guide families through complex decisions without overwhelming them. The design will use high-contrast color schemes, large fonts, and logical organization to ensure readability across diverse literacy levels and for citizens with visual impairments.
- **Compliance Disclosures in Plain Language:** Because CPSM and MACS involve long-term financial commitments, disclosures must be transparent and easy to understand. Precision will translate regulatory language into clear, plain English without sacrificing legal accuracy, ensuring parents and guardians feel confident in their decision-making. All disclosures, such as refund policies, investment terms, and program limitations, will be highlighted in dedicated sections, making them easy to locate within the booklet.
- **Program Benefits and Success Stories:** To reinforce the value of enrollment, each booklet will feature real-world examples of Mississippi families who have successfully participated in CPSM or claimed unclaimed property. These short case studies will make the material



more relatable and persuasive by demonstrating tangible benefits. Incorporating testimonials and outcome data also provides OST with an opportunity to humanize financial programs and encourage participation through peer examples.

- **Multilingual and Inclusive Access:** Recognizing Mississippi's demographic diversity, Precision will design the enrollment booklet with the ability to be translated into Spanish and other commonly spoken languages as requested by OST. We will also ensure compliance with ADA guidelines, producing digital versions that are screen-reader compatible. This inclusive design ensures equitable access to CPSM and MACS across all communities in Mississippi.
- **Digital and Print Integration:** In addition to printed booklets for distribution at fairs, schools, and OST offices, Precision will create digital versions formatted for desktop, tablet, and mobile use. These digital booklets will include hyperlinks to OST's website, enrollment portals, and customer service contacts, making it easier for families to take action immediately. All formats will be reviewed and approved by OST prior to public release, guaranteeing both accuracy and branding consistency.

By combining technical clarity with accessible design, Precision will ensure OST's enrollment booklets not only meet compliance requirements but also actively increase participation in CPSM and MACS programs.

b) Flyers and Brochures

Flyers and brochures play a unique role in OST's outreach efforts because they allow the agency to distribute concise, eye-catching information to large audiences in both professional and community settings. Unlike enrollment booklets, which are detailed guides, these materials are designed to spark immediate interest and direct individuals to take the next step, whether that means visiting the OST website, attending an event, or enrolling in CPSM. Precision Consulting will design flyers and brochures that are both visually appealing and content-rich, ensuring they align with OST's strategic goals and program requirements.

- **Single-Sheet Flyers for Broad Distribution:** Flyers will be produced in a streamlined format that conveys the most essential information about CPSM, MACS, and Unclaimed



Property programs. These materials will be distributed in high-traffic locations such as libraries, banks, civic centers, and employer benefits fairs. Each flyer will use QR codes or short URLs linked directly to OST portals, ensuring recipients can immediately act on the information provided.

- **Fold-Over Brochures for Deeper Engagement:** For audiences that require more detail than a single sheet can provide, Precision will design fold-over brochures with expanded content. These brochures will include program benefits, enrollment timelines, and answers to frequently asked questions. Distributed at conventions, financial literacy events, and schools, the brochures will serve as a bridge between brief advertising and the comprehensive enrollment booklet, giving citizens enough context to seriously consider participation.
- **Audience-Specific Customization:** Flyers and brochures will be tailored to specific demographics and distribution contexts. For example, employer-distributed flyers will highlight CPSM's payroll-deduction options, while community event brochures may focus on the ease of claiming unclaimed property. By segmenting content in this way, OST can ensure that each audience receives messaging that resonates with their specific needs.
- **Design Standards and Accessibility:** All materials will follow OST branding guidelines to maintain visual consistency across campaigns. Precision will use high-contrast designs, simple typography, and clear headings to ensure accessibility, including for citizens with low literacy or visual impairments. Multilingual versions will be produced as requested, ensuring that no community in Mississippi is excluded from OST outreach.
- **Compliance and Approval Process:** Before distribution, all drafts of flyers and brochures will be submitted to OST for review and approval. This process ensures that program details, deadlines, and disclosures are accurate and fully aligned with agency standards. Precision will also maintain a content management log, tracking which versions were released and where, so OST has a clear record of outreach activities.



Through these measures, Precision will create flyers and brochures that not only raise awareness but also move citizens one step closer to action, whether enrolling in a savings plan or reclaiming property owed to them.

c) Posters and Banners

Large-format materials such as posters and banners are vital for maximizing OST's visibility at public gatherings, conventions, association meetings, and fairs. These displays are often the first point of contact for citizens at events, serving as both attention-grabbers and quick sources of key program information. Precision Consulting will design posters and banners that combine bold visuals with concise messaging, ensuring OST programs are instantly recognizable and easily understood in crowded or fast-moving environments.

- **High-Impact Visual Design:** Posters will feature strong, high-contrast graphics and OST branding elements to ensure immediate recognition from a distance. Messaging will be reduced to its most essential components, such as "Save for College with CPSM" or "Claim What's Yours – Mississippi Unclaimed Property." Each design will use iconography and visual cues to quickly communicate program benefits without requiring long reading times.
- **Durable, Reusable Materials:** Because OST participates in recurring events across the state, Precision will produce posters and banners on durable, weather-resistant substrates. This ensures they maintain a professional appearance whether displayed indoors at conventions or outdoors at fairs and community festivals. By investing in reusable materials, OST will reduce long-term costs while ensuring consistent branding.
- **Strategic Placement and Event Customization:** Precision will design multiple sizes and formats, from small posters for indoor bulletin boards to large vinyl banners for outdoor booths. We will also provide stands and mounting solutions to allow flexible use in different venues. At major events, oversized banners will frame OST's booth to draw traffic, while smaller posters will be positioned at entrances, registration tables, or alongside community bulletin boards to direct citizens toward OST representatives.
- **Program-Specific Messaging:** Posters and banners will be customized to reflect the unique goals of each OST program. For example, CPSM posters will emphasize long-term



benefits of early college savings and highlight enrollment deadlines, while Unclaimed Property banners may focus on action-oriented language such as “Search Your Name Today.” Precision will coordinate messaging calendars with OST staff to ensure visuals align with program cycles.

- **Integration with Other Collateral:** Each poster and banner will incorporate QR codes or web links that connect directly to OST microsites, allowing attendees to transition seamlessly from awareness to action. This integration ensures that even citizens who pass by without speaking to OST representatives still have a way to engage with the program afterward.

Through these high-impact, durable, and strategically placed displays, Precision will ensure OST maintains a strong visual presence at every event, reinforcing statewide awareness and prompting citizens to take action.

d) Taglines and Slogans

Memorable taglines and slogans are essential for ensuring that OST programs resonate with citizens and remain top-of-mind long after an advertisement or event concludes. Unlike longer-form collateral such as brochures or booklets, taglines must distill complex program benefits into a few powerful words that citizens can easily recall. Precision Consulting will develop, test, and refine these concise messages to ensure they strengthen brand recognition for CPSM, MACS, and the Unclaimed Property Initiative.

- **Creative Development Process:** Precision will begin with a structured ideation process involving brainstorming sessions, message mapping, and audience analysis. Draft taglines will be developed around key program values, for CPSM, emphasizing affordability and future planning; for MACS, flexibility and savings growth; and for the Unclaimed Property Initiative, empowerment and recovery of lost assets. Each draft will be aligned with OST’s overall communications strategy to ensure consistency across campaigns.
- **Audience Testing and Feedback:** To ensure taglines resonate with Mississippi residents, Precision will test messaging concepts with small focus groups or online panels representing target demographics. Feedback will be analyzed to identify which phrases are



most memorable, trustworthy, and motivating. This step guarantees that OST-approved slogans are not only creative but also evidence-based in their effectiveness.

- **Integration Across Channels:** Once approved by OST, selected taglines will be consistently deployed across all media formats, radio and television spots, internet campaigns, enrollment booklets, posters, and brochures. Consistent repetition across channels will reinforce recognition, helping citizens immediately associate the message with OST's trusted programs.
- **Compliance and Review:** In line with the RFP requirements, OST will review and approve all taglines and slogans before public release. Precision will provide multiple options for each program, along with explanations of the creative rationale behind them, giving OST leadership confidence in both the process and final selection.

By developing taglines and slogans that are concise, resonant, and strategically applied, Precision will ensure OST's programs achieve greater visibility and recognition statewide, driving increased participation and trust.

3. Evaluation of Communication and Marketing Results

Evaluation is central to ensuring that OST's investment in communications and marketing translates into measurable outcomes. Precision Consulting will apply rigorous, data-driven methodologies to assess campaign effectiveness, track constituent engagement, and refine future strategies. This systematic approach will ensure OST not only meets but also exceeds its program objectives by continually improving its outreach.

a) Awareness & Buyer Research

Awareness and buyer research are critical to determining whether OST's campaigns are reaching their intended audiences and influencing behavior as designed. Precision Consulting will implement a layered research strategy that combines quantitative and qualitative methods to assess baseline knowledge, campaign reach, and post-campaign outcomes. By evaluating both awareness levels and decision-making behaviors, we will provide OST with a clear picture of how



communications translate into measurable participation in CPSM, MACS, and the Unclaimed Property Initiative.

- **Pre-Campaign Baseline Studies:** Before launching each major campaign, Precision will conduct surveys using stratified random sampling to establish baseline awareness levels across Mississippi. These surveys will capture key indicators such as citizens' familiarity with OST programs, understanding of enrollment requirements, and recognition of existing program branding. Establishing this baseline is essential for measuring the effectiveness of subsequent campaigns.
- **Post-Campaign Impact Assessments:** After each campaign concludes, follow-up surveys will be administered to comparable audience groups to assess changes in awareness, recall of campaign messages, and self-reported likelihood of participation. The difference between baseline and post-campaign measures will provide OST with a clear and quantifiable measure of communication impact.
- **Focus Groups and Community Panels:** To complement survey data, Precision will organize focus groups and community panels in urban and rural regions. These discussions will capture nuanced feedback about message clarity, trust in OST branding, and perceived barriers to participation. For example, participants may provide insights into whether CPSM enrollment materials are easy to understand or whether Unclaimed Property messaging motivates immediate action.
- **Behavioral and Transactional Data Integration:** In addition to self-reported measures, Precision will analyze behavioral data such as website visits, unclaimed property searches, and CPSM/MACS enrollment submissions during campaign periods. These data points will be compared with survey results to validate findings and provide OST with a comprehensive view of both intent and actual behavior.
- **Targeted Demographic Insights:** Research will be segmented by key demographics, including age, income level, education status, and geography. For instance, we will examine whether younger parents with school-aged children show increased CPSM awareness compared to older demographics, or whether rural residents are less likely to



engage with digital campaigns. Such insights will guide adjustments to outreach methods and resource allocation.

By combining pre- and post-campaign surveys, qualitative feedback, and behavioral analytics, Precision will provide OST with a robust evidence base for assessing the success of its communications. This ensures that future campaigns are not only creative but also directly informed by the measured needs and responses of Mississippi citizens.

b) Performance Metrics

Tracking performance through well-defined metrics ensures that OST's investments in communications and marketing produce measurable and transparent results. Precision Consulting will establish a comprehensive performance monitoring system that not only reports outcomes but also provides OST with insights into how those outcomes were achieved. Our approach is rooted in accountability and evidence-based evaluation, ensuring each campaign cycle can be assessed, compared, and improved over time.

- **Quarterly KPI Dashboards:** Precision will deliver quarterly performance dashboards that summarize campaign results using key performance indicators (KPIs). These KPIs will include program-specific enrollment increases for CPSM and MACS, the number of successful unclaimed property claims initiated during campaign periods, media impressions, and cost-per-acquisition data. Each dashboard will be designed for executive readability, highlighting trends and variances that require leadership attention.
- **Cross-Channel Engagement Tracking:** Campaigns will be analyzed across multiple communication channels, including broadcast media, digital platforms, community outreach, and event marketing, to determine which outlets produce the greatest return. Metrics such as social media engagement rates, television gross rating points (GRPs), and radio listenership data will be integrated into a single report for OST review. This holistic approach prevents siloed analysis and ensures OST has a complete view of its outreach effectiveness.
- **Geographic and Demographic Segmentation:** Performance metrics will be disaggregated by county, age group, income level, and other relevant demographics. For



instance, Precision will map which counties exhibit higher CPSM enrollment increases relative to campaign activity, identifying geographic areas that may need additional investment. Similarly, demographic breakdowns will allow OST to determine whether campaigns are reaching targeted audiences, such as young parents or first-time property claimants.

- **Conversion Analysis:** Beyond measuring awareness and engagement, Precision will track conversions, the point at which citizens take action. For CPSM and MACS, this means tracking completed enrollments, while for unclaimed property, it means measuring verified claims submitted through OST portals. Conversion rates will be compared against campaign spend to evaluate efficiency and guide resource reallocation.
- **Benchmarking and Historical Comparisons:** Each campaign cycle will be benchmarked against prior OST initiatives and industry standards for government communications. This comparative lens will allow OST to identify long-term trends, determine whether current campaigns outperform past efforts, and adopt best practices from comparable agencies.

Through these performance metrics, Precision will give OST not only a record of what happened during campaigns but also actionable intelligence on why results occurred, enabling leadership to make data-driven decisions for future strategy.

c) Continuous Improvement

Communications and marketing are dynamic fields that must evolve with changing technologies, audience behaviors, and program priorities. To ensure OST remains at the forefront of effective public engagement, Precision Consulting will embed continuous improvement practices into every stage of campaign design, execution, and evaluation. Our approach is proactive, using data and feedback not simply to measure results, but to refine strategies in real time and guide long-term innovation.

- **Predictive Modeling for Campaign Optimization:** Precision will use advanced predictive analytics to forecast which campaign messages, channels, and formats are most likely to yield strong results. For example, we will analyze historical CPSM enrollment trends against campaign timing to predict optimal launch windows for future efforts. These



models will allow OST to anticipate audience responses rather than react after campaigns conclude, increasing efficiency and effectiveness.

- **Sentiment and Engagement Analysis:** Digital and social media platforms generate real-time feedback on public reactions to OST messaging. Precision will apply sentiment analysis to track whether citizen responses to campaigns are positive, neutral, or negative. We will also examine patterns of engagement, such as comments, shares, and click-through behavior, to identify which narratives resonate most strongly with Mississippi residents. Insights from this analysis will feed directly into campaign adjustments.
- **A/B Testing of Messaging and Creative Content:** To continuously improve campaign effectiveness, Precision will run A/B tests on digital advertisements, email communications, and website landing pages. For example, two versions of an ad, one emphasizing cost savings and another emphasizing future security, will be tested simultaneously, with real-time data guiding which is deployed at scale. This evidence-based method ensures OST resources are concentrated on the most impactful creative strategies.
- **Adaptive Outreach Strategies:** Continuous improvement requires the flexibility to pivot quickly when certain methods underperform. Precision will develop rapid-response protocols that allow for reallocation of resources mid-campaign. For instance, if broadcast radio ads prove less effective than anticipated in certain counties, funds can be shifted toward digital or event-based outreach targeting the same population.
- **Knowledge Transfer and Best Practices:** Each campaign cycle will conclude with a lessons-learned session, during which Precision will present findings on what worked well, what challenges emerged, and how strategies can be improved moving forward. These sessions will ensure OST staff are equipped with evolving best practices, strengthening the agency's in-house capacity to sustain improvements across future campaigns.

By embedding predictive analytics, real-time monitoring, and iterative testing into its communications framework, Precision will help OST maintain an agile, adaptive marketing system that continuously enhances outreach effectiveness and public engagement.



d) Reporting and Decision Support

Effective reporting ensures that evaluation results translate into actionable insights for OST leadership. Precision Consulting will not only collect and analyze campaign performance data but also present it in a format that supports clear, evidence-based decision-making. Our goal is to provide OST with a reporting structure that is timely, transparent, and tailored to the strategic needs of the Treasurer's Office.

- **Comprehensive Written Reports:** At the conclusion of each campaign cycle, Precision will deliver written reports that summarize performance metrics, highlight key findings, and outline recommendations for future improvements. These reports will include executive summaries for quick reference, detailed appendices with raw data for transparency, and visual dashboards to make complex analytics easy to interpret. By offering multiple levels of detail, we ensure that both technical staff and executive leadership can engage with the results.
- **Interactive Presentations to OST Leadership:** In addition to written reports, Precision will provide in-person or virtual presentations to OST decision-makers. These sessions will allow for interactive discussion of results, enabling leadership to ask clarifying questions, explore alternative strategies, and make informed adjustments to upcoming campaigns. Presentations will include data visualizations such as maps, graphs, and trend charts to illustrate outcomes clearly and persuasively.
- **Decision-Support Tools:** Precision will develop decision-support tools, such as Tableau dashboards and Excel-based forecasting models, that OST staff can use between formal reporting periods. These tools will allow staff to monitor progress in real time, explore “what-if” scenarios, and model the potential impact of adjusting campaign resources. By empowering OST staff with these tools, we strengthen their ability to make agile decisions without waiting for quarterly reports.
- **Accountability and Compliance Documentation:** To maintain transparency and meet state reporting standards, Precision will ensure that all reports are archived with version control and timestamped for audit readiness. Reports will also document compliance with



OST's approval processes, showing which materials and strategies were pre-cleared before implementation. This guarantees that OST has a clear record of both strategic intent and executed activities.

- **Integration with Policy and Program Goals:** Reporting will not focus solely on campaign outcomes but will explicitly connect results to OST's broader program objectives. For example, a report on CPSM marketing will link enrollment increases to Mississippi's higher education affordability goals, while Unclaimed Property reporting will highlight the number of citizens directly benefiting from OST efforts. By grounding communications results in larger policy outcomes, we ensure leadership can demonstrate the tangible public value of OST's investments.

Through this multi-layered reporting framework, Precision will ensure that OST's leadership is equipped with the information, tools, and context needed to make confident, data-driven decisions about future communications strategies.

4. History and Specialized Project Experience

Precision Consulting has nearly two decades of experience designing and executing specialized marketing, communications, and evaluation projects that span multiple markets and diverse populations. Our proven history demonstrates the ability to take complex initiatives, whether statewide government programs, multi-campus higher education grants, or Fortune 500 marketing projects, and deliver measurable results across different demographic groups. This directly aligns with OST's requirement for vendors who can manage specialized marketing programs that touch multiple markets while maintaining message consistency.

- **State of Colorado – Disaster Assistance Gap Analysis:** In 2024, the Colorado Division of Homeland Security and Emergency Management contracted Precision to conduct a three-stage gap analysis of its disaster assistance programs. This project required us to design and administer mixed-method surveys that captured input from state leadership, local agencies, and survivors of natural disasters, particularly wildfires. We employed both quantitative and qualitative methods, including phenomenological interviews and embedded case studies, to reach different markets and ensure voices from all levels were



included. Our final report, structured around the McKinsey 7S framework, gave Colorado actionable recommendations to improve service delivery before, during, and after disasters. This project highlights our ability to manage multi-market communications campaigns with overlapping stakeholder groups, a model directly transferable to OST's simultaneous management of CPSM, MACS, and Unclaimed Property programs.

- **State of Oregon – Cost-Benefit Evaluation of Surplus Property Program:** In 2025, we delivered a comprehensive evaluation of Oregon's Surplus Property Program. This engagement required balancing outreach to state administrators, government employees who accessed the program, and taxpayers concerned about efficiency. Precision collected and analyzed data across multiple markets and presented findings that allowed the state to optimize its operations. Just as this evaluation addressed complex operational questions, our approach for OST will balance the financial, community, and regulatory aspects of its college savings and unclaimed property programs.
- **Georgia College & State University – SANE Program Evaluation:** Precision served as the third-party evaluator for Georgia College's federally funded Sexual Assault Nurse Examiner (SANE) program. This project required us to market and evaluate a program across academic, clinical, and community settings. We conducted on-site interviews, surveys, and stakeholder engagement sessions, ensuring that voices from faculty, students, and healthcare providers were represented. This mirrors OST's need for multi-layered outreach strategies, communicating effectively with families, employers, and civic organizations simultaneously.
- **Corporate Marketing Campaigns – ESPN, Smucker's, Verizon:** Precision has supported Fortune 500 clients with complex marketing challenges that required reaching broad and varied audiences. For ESPN, we developed a real-time digital tool to optimize NCAA March Madness brackets, which required a national campaign engaging casual fans and professional sports analysts alike. For Smucker's, we conducted a statistical variance analysis of its flagship product penetration, a project requiring both creative consumer-facing messaging and technical analytics for internal decision-makers. For Verizon, we advised on integrating three different login platforms into a single user experience,



requiring communication across technical, corporate, and consumer markets. These corporate projects demonstrate our ability to simultaneously manage creative, technical, and analytic demands across multiple audiences.

- **University of Southern California – Diversity and Inclusion Initiative:** In 2022, Precision conducted a qualitative study on diversity and inclusion perceptions among students, faculty, and administrators. This project required us to navigate sensitive communications across academic, professional, and student populations. Our final report directly informed USC’s new diversity and inclusion agenda, underscoring our strength in translating complex, multi-market feedback into clear, actionable strategy.

5. Creative and Analytics Staff Qualifications

Precision Consulting’s strength lies in the integration of a seasoned creative team with over five years of experience in large-scale graphic design campaigns and a highly specialized analytics division trained in advanced research methods and demographic analysis. Together, this team ensures that OST receives communications products that are not only visually compelling but also backed by rigorous data, maximizing both impact and accountability.

- **Creative Staff Experience:** Our design and communications professionals have directed campaigns for both government agencies and Fortune 500 companies, consistently delivering projects that span multiple markets and demographics. For example, creative staff designed event displays and branded collateral for ESPN’s nationwide March Madness campaign and produced print/digital outreach for the Glass Packaging Institute, requiring the ability to adapt designs for both consumer-facing and industry audiences. Each lead creative professional has a minimum of seven to ten years’ experience in large-format design, enrollment materials, and campaign branding, well above OST’s requirement of five years. Their expertise ensures that enrollment booklets, posters, and community-facing collateral for CPSM, MACS, and Unclaimed Property will be both professional and culturally resonant across Mississippi.
- **Analytics Staff Expertise:** Precision’s analytics team is led by Dr. Martin Barugel, Ph.D. in Economics, who oversees predictive modeling, neural network applications, and



geostatistical sampling. His recent work for Nielsen and ESPN involved pattern recognition algorithms and Kalman-filter forecasting, demonstrating his ability to apply advanced analytics to real-world outreach campaigns. Supporting him, Aaron Houston, MPH, Precision's Chief Analytics Officer, specializes in epidemiological modeling, survey design, and statistical programming with SAS, SPSS, Mplus, and Tableau. His experience as a CDC ORISE Fellow included national-level demographic forecasting and co-authoring peer-reviewed publications. Together, they will translate raw campaign data into insights that directly inform OST's communication strategy.

- **Integrated Creative-Analytics Approach:** What distinguishes Precision from competitors is our commitment to fusing creative design with data-driven targeting. For example, while our creative staff develops multiple design concepts for a CPSM enrollment booklet, our analytics staff simultaneously tests these versions with focus groups and A/B testing, ensuring the final product resonates with target demographics. Similarly, at OST events, our creative team will produce engaging visual displays while our analytics team integrates QR codes and digital tracking tools to capture user engagement and tie it back to OST's performance metrics. This ensures that every creative asset serves as both a communications vehicle and a measurable data point.
- **Diverse and Experienced Team:** Our project roster demonstrates the depth of OST's dedicated team:
 - **Charlotte Chabot, Co-Founder** – provides executive-level oversight with expertise in business development and quantitative analysis.
 - **Clark Guo, Vice Chairman** – mathematician and economist, specializing in advanced survey design and predictive analysis.
 - **Dr. Martin Barugel, Director of Machine Learning** – leads predictive modeling, spatial analytics, and campaign forecasting.
 - **Aaron Houston, Chief Analytics Officer** – expert in biostatistics, epidemiology, and large-scale quantitative analysis.



- **Szamor Williams, Chief Experience Officer** – 11+ years in marketing and research operations, directs AI integration into client engagement.
- **Raya Joson, Director of Qualitative Research** – 12 years of qualitative project leadership, overseeing NVivo training and thematic analysis.
- **Dr. Alexandra Caplan, Research Methodologist** – expert in GIS mapping, regression modeling, and spatial equity analysis.

Through this combination of seasoned designers and advanced analysts, Precision exceeds OST's minimum requirements for creative and analytics staff. Our team's breadth of experience, technical specialization, and integrated workflows guarantee that OST receives communications campaigns that are innovative, evidence-based, and tailored to the diverse needs of Mississippi citizens.



Cost Proposal for:

The Mississippi Office of the State Treasurer (OST) –

Communications and Marketing Consultants

RFP# - 3120003221



Date: September 23, 2025



Pricing Schedule

Precision proposes a fixed-price contract structure, fully aligned with OST's requirement for payments tied to the completion of defined tasks. This model ensures transparency and predictability for the Treasurer's Office, while protecting the agency from fluctuating costs or unexpected overruns. Our pricing reflects the integration of both creative and analytics staff, guaranteeing that OST receives a balanced service portfolio where every deliverable combines compelling communications with measurable outcomes.

Media Production & Placement Costs

In addition to hourly rates, certain media and production activities require fixed deliverable costs to ensure accurate budgeting and competitive procurement. These costs are based on industry standards, refined through our firm's prior experience with both government and corporate clients. They cover the entire production lifecycle, from concept to final delivery, and ensure OST receives polished, high-quality outputs ready for immediate deployment. The proposed production and placement costs include:

- **Radio Production:** Each 30-second radio spot will be billed at \$2,500, covering scriptwriting, casting of professional voice talent, and audio production to broadcast quality. Costs also include mixing, mastering, and compliance review to ensure OST approval before release. By bundling these services into a fixed cost, OST avoids piecemeal billing and gains assurance that every spot delivered is fully production-ready.
- **Television Production:** Each 30-second television commercial will be billed at \$12,500, which encompasses concept development, location filming, editing, and motion graphics. Our production team will manage casting, set design, and post-production to create a visually engaging final product aligned with OST's branding standards. The bundled cost ensures transparency while guaranteeing a professional-grade product suitable for both statewide and regional broadcast placements.
- **Digital Ads (Facebook, Google, LinkedIn):** Digital ads will be billed at cost for placement, with a 10% management fee applied for campaign monitoring, adjustments, and reporting. This ensures OST receives competitive market rates while benefitting from



expert oversight and optimization. Precision's analysts will continuously refine targeting, ensuring every ad dollar maximizes engagement and conversions.

- **Print Production (Brochures, Posters, Banners):** Print materials will be billed at cost for printing, with an 8% coordination fee applied to manage vendor relationships, quality control, and delivery. This approach ensures OST avoids administrative burdens while maintaining full visibility into actual printing costs. By combining production oversight with vendor management, Precision guarantees that materials arrive on time, within budget, and to specification.

Invoicing and Payment Terms

All invoicing will be completed in strict compliance with OST's requirement for payments in arrears. Precision will issue invoices monthly, tied to specific completed deliverables rather than hours alone, ensuring OST pays only for measurable outcomes. Each invoice will itemize services by category, hours expended, and deliverables produced, giving OST full transparency into project costs.

Cost Justification

Precision's cost structure reflects a deliberate balance between expertise, comprehensive service delivery, and competitive pricing in the government contracting marketplace. Senior staff such as Charlotte Chabot and Clark Guo will provide oversight, ensuring OST benefits from nearly two decades of proven leadership in marketing and program evaluation. The integration of highly specialized staff, such as Dr. Martin Barugel in predictive modeling and Aaron Houston in statistical evaluation, ensures analytics and reporting are handled with unmatched rigor. At the same time, our creative professionals, including Szamor Williams and Raya Joson, deliver polished design and targeted community engagement. This dual structure guarantees that OST receives best-in-class creative outputs paired with measurable data-driven insights, positioning our proposal as cost-effective relative to firms offering narrower or less integrated capabilities.



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
Strategic Planning & Campaign Oversight	\$250 per hour
Media Strategy & Placement	\$175 per hour
Creative Design & Production	\$165 per hour
Copywriting & Messaging	\$140 per hour
Digital Campaign Management	\$160 per hour
Event Marketing & Booth Management	\$145 per hour
Qualitative Research (Focus Groups, NVivo)	\$150 per hour
Quantitative Analytics & Forecasting	\$175 per hour
Reporting & Decision-Support Tools	\$140 per hour
Project Administration & Support	\$95 per hour
Radio Production	\$2,500 per 30-second spot (all-inclusive)
Television Production	\$12,500 per 30-second commercial
Digital Ads	At-cost placement + 10% management fee
Print Production (Brochures/Posters/Banners)	At-cost printing + 8% coordination fee



Management Proposal for:

The Mississippi Office of the State Treasurer (OST) –

Communications and Marketing Consultants

RFP# - 3120003221



Date: September 23, 2025



Firm Qualifications

Precision Consulting Firm, LLC (Precision) was founded in 2006 and has evolved from a two-person statistical consultancy into a multimillion-dollar global research, evaluation, and communications strategy firm. Recognized on the Inc. 500 list as one of the fastest-growing private companies in America, Precision has become a trusted partner for public-sector agencies, universities, and Fortune 500 corporations. Our longevity and growth reflect our ability to consistently deliver measurable outcomes for clients, supported by a team of experts who combine methodological rigor with creative execution. With a fully cloud-based infrastructure and offices in Las Vegas, we are capable of supporting statewide initiatives like those required by OST with both efficiency and scalability.

- **Experience in Multi-Market Campaigns:** Precision has extensive experience designing campaigns that require tailored messaging for multiple, distinct audiences simultaneously. For instance, our work for ESPN required crafting communications that resonated with casual fans and data-savvy analysts alike. Similarly, projects for state agencies like Colorado and Oregon required us to simultaneously engage policymakers, community stakeholders, and citizens through integrated survey, outreach, and evaluation strategies. This experience demonstrates that we are uniquely capable of managing OST's need to market CPSM, MACS, and Unclaimed Property across families, employers, schools, and civic groups without diluting message consistency.
- **Full-Service Capabilities:** Unlike many firms that focus only on advertising or only on analytics, Precision provides end-to-end services covering strategy development, creative design, broadcast production, digital marketing, program evaluation, and advanced analytics. For example, when engaged by the Glass Packaging Institute, we not only designed creative assets but also optimized their reporting of monthly industry data across member organizations. Similarly, our work for Smucker's combined consumer-facing campaign messaging with behind-the-scenes variance analysis to improve manufacturing outcomes. This integrated model allows OST to rely on a single firm for all phases of communications, ensuring cohesion, accountability, and streamlined project management.



- **Compliance and Transparency:** Precision operates as a Women-Owned Business (WOB) with full federal and state registrations, including DUNS, CAGE, and NAICS codes. Our compliance protocols ensure that every deliverable is fully auditable and that financial and performance data are tracked with accuracy and transparency. We have experience managing projects under strict regulatory frameworks, such as federally funded higher education evaluations and Department of Justice litigation support. For OST, this means we can seamlessly integrate Mississippi procurement requirements, reporting obligations, and communications compliance processes into our work without delay or added burden for agency staff.



Project Team and Key Personnel

Precision's proposed project team for OST represents a blend of senior leadership, specialized analysts, and experienced creative professionals with decades of combined experience in marketing, communications, and program evaluation. Each member has been carefully selected for this engagement based on their direct expertise in areas such as predictive modeling, creative campaign design, qualitative research, GIS analysis, and executive oversight. The team structure ensures that OST benefits from both high-level strategic direction and hands-on technical execution. Together, these professionals will provide comprehensive coverage of every aspect of the Scope of Services, ensuring that deliverables are timely, compliant, and impactful. The core team members include:

Charlotte Chabot – Principal in Charge



Charlotte Chabot is the Co-Founder of Precision and has nearly twenty years of leadership experience in communications, program evaluation, and business development. She transformed Precision from a two-person startup into a multimillion-dollar firm recognized by the Inc. 500 list of fastest-growing private companies. Ms. Chabot has directed marketing and evaluation initiatives for global corporations and U.S. government agencies, ensuring both creative innovation and methodological rigor. For OST, she will provide executive-level oversight, quality assurance, and direct client engagement to guarantee that all services meet the Treasurer's expectations and state compliance requirements.

Time Commitment: 10%

Clark Guo – Vice Chairman and Senior Advisor



As Co-Founder of Precision, Clark Guo brings over eighteen years of experience in advanced survey design, predictive analysis, and statistical modeling. With a dual background in mathematics and economics from Caltech and Boston University, he has cultivated partnerships with Fortune 500 clients and directed interdisciplinary teams on projects spanning gaming analytics, market research, and biostatistics. Mr. Guo provides strategic oversight and ensures campaigns are informed by strong methodological frameworks, making complex data accessible to decision-makers. For OST, he will focus on guiding overall strategy and mentoring analysts to ensure campaigns are targeted and evidence-based.

Time Commitment: 10%

Dr. Martin Barugel – Director, Machine Learning & Predictive Modeling



Dr. Martin Barugel holds a Ph.D. in Economics from the University of Cambridge and directs Precision's 30-member analytics division. He specializes in predictive modeling, geostatistical sampling, and neural network applications, bringing more than fifteen years of applied and academic experience. His portfolio includes Kalman-filter forecasting, real-time analytics engines, and campaign optimization for clients such as Nielsen and ESPN. For OST, Dr.

Barugel will design and oversee analytics systems that measure campaign reach, optimize audience targeting, and ensure communications investments deliver measurable results.

Time Commitment: 20%



Aaron Houston, MPH – Chief Analytics Officer



Aaron Houston, MPH, leads Precision's analytics operations and has a strong background in epidemiology, statistical modeling, and mixed-methods evaluation. He previously served as a CDC ORISE Research Fellow, where he analyzed national youth behavior surveillance data and co-authored peer-reviewed publications. Mr. Houston brings expertise in SAS/SUDAAN, Mplus, SPSS, MAXQDA, and Tableau, ensuring rigorous methodological integrity across projects. For OST, he will direct affordability-gap modeling, enrollment forecasting, and demographic analysis to ensure campaigns are evidence-driven and responsive to Mississippi citizens' needs.

Time Commitment: 25%

Szamor Williams – Chief Experience Officer



Szamor Williams brings over eleven years of experience in marketing, communications, and research operations. He has directed multimillion-dollar programs in healthcare, education, and public policy while also leading AI integration into marketing strategies. As former Chief Operating Officer, he secured over \$2.1 million in new business while managing client engagement strategies that emphasized innovation and inclusivity. For OST, Mr. Williams will oversee creative development, event marketing, and community engagement initiatives, ensuring that campaign experiences are seamless, effective, and citizen-centered.

Time Commitment: 20%

Raya Joson – Director of Qualitative Research



With twelve years of experience and more than 700 completed qualitative projects, Raya Joson is an expert in phenomenology, content analysis, and systematic reviews. She has held multiple leadership roles at Precision, including Director of Prompt Engineering and Chief of Staff, where she advanced AI-driven thematic analysis. Ms. Joson is also highly skilled in NVivo and MAXQDA, frequently training clients and analysts in qualitative data

coding and interpretation. For OST, she will lead listening sessions, focus groups, and qualitative evaluations to ensure campaigns resonate with the voices and experiences of Mississippi citizens.

Time Commitment: 15%

Dr. Alexandra Caplan – Research Methodologist & GIS Analyst



Dr. Alexandra Caplan holds a Ph.D. in Geography from Oregon State University and specializes in spatial equity, environmental governance, and demographic mapping. At Precision, she has designed surveys, conducted structural-equation and regression modeling, and produced GIS-based visual analytics for national and international clients. She also serves as a visiting researcher at the Environmental Law Institute, where she manages research on

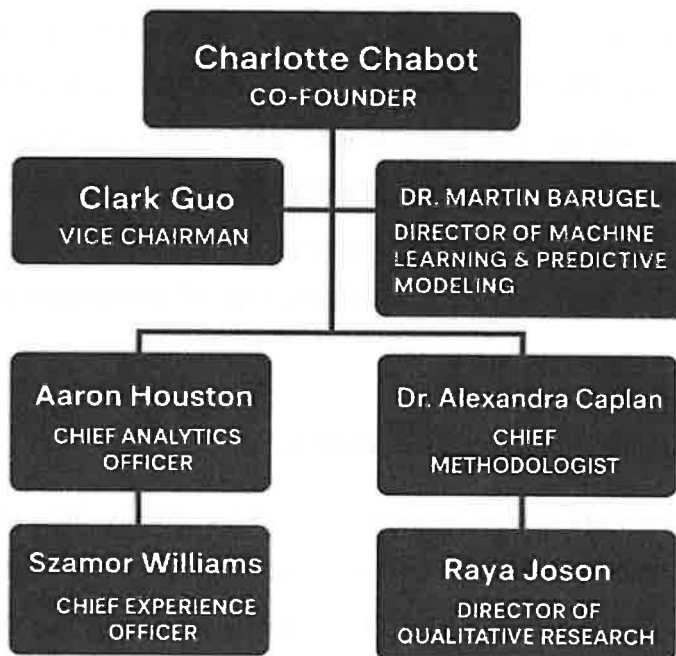
global environmental peacebuilding. For OST, Dr. Caplan will oversee geographic targeting of campaigns, ensuring outreach effectively covers both rural and urban Mississippi communities.

Time Commitment: 15%



Organizational Chart

PRECISION CONSULTING FIRM, LLC



Subcontractors

Precision does not anticipate the use of subcontractors for this engagement. All core creative, communications, and analytic services will be delivered in-house by our dedicated senior team.

Quality-Management

The Respondent employs a structured quality-management framework to ensure compliance with OST requirements and continuous improvement across deliverables. Our internal QC process includes:

- **QC Checklist:**
 - Draft deliverables undergo peer review before client submission.



- All creative assets are checked for compliance with OST branding and Mississippi state requirements.
- Statistical analyses are double-coded by a secondary analyst for accuracy.
- Media buys and placements are verified through vendor confirmations and reconciled against invoices.
- Reports are reviewed for plain-language clarity and accessibility compliance (ADA, multilingual if required).

Quarterly internal audits ensure corrective actions are documented and applied. This system guarantees that OST receives deliverables that are accurate, timely, and in full compliance with contract requirements. Precision also affirms that there are no past or pending regulatory restrictions, consent orders, or litigation involving the firm, its principals, or officers. No principals or officers have been convicted of a felony.



Past Performance

Precision's past performance demonstrates our ability to deliver specialized, multi-audience communications and evaluation projects for government agencies and higher education institutions. These references highlight our alignment with OST's evaluation criteria, particularly our proven history with specialized projects, expertise in market research, and experience managing direct campaigns that reach diverse demographics.

Cecil County Transit Authority, Maryland

- **Client Contact:** Suzanne Kalmbacher, Transit Manager
- **Phone:** (410) 996-8422
- **Email:** skalmbacher@cecilcountymd.gov
- **Address:** 200 Chesapeake Blvd, Elkton, MD 21921
- **Contract Value & Period:** \$58,000; November 2024 – June 2025
- Precision was contracted to conduct a comprehensive operational analysis for Cecil County's transit system. The engagement included strengthening ridership data collection, establishing predictive modeling to forecast funding scenarios, coordinating with neighboring jurisdictions, and benchmarking best practices across Maryland. Our reporting system allowed Cecil County to meet current MTA requirements while preparing for anticipated revisions. This project underscores our ability to combine technical analytics with public communications, ensuring compliance while producing actionable insights for funding expansion.

State of Colorado – Division of Homeland Security & Emergency Management (DHSEM)

- **Client Contact:** Percy Cline, Purchasing & Contract Management
- **Phone:** (970) 290-5480
- **Email:** cdps_edo_bids@state.co.us
- **Address:** 9195 E Mineral Avenue, Suite 200, Centennial, CO 80112
- **Contract Value & Period:** \$16,000; June 2024 – January 2025
- Precision conducted a comprehensive gap analysis of Colorado's disaster assistance programs. Our team used a three-stage mixed-methods design that included stakeholder



interviews, phenomenological surveys, and embedded case studies. The final deliverable was a 7-S framework matrix that now informs wildfire recovery policy. This project demonstrates our capacity to manage communications across multiple markets simultaneously, engaging survivors, nonprofits, and state leadership in a unified evaluation.

State of Oregon – Surplus Property Program

- **Client Contact:** Sven Anderson, State Surplus Property Manager
- **Phone:** (503) 378-6057
- **Email:** Sven.Anderson@das.oregon.gov
- **Address:** 1655 Salem Industrial Drive NE, Salem, OR
- **Contract Value & Period:** \$28,800; July 2024 – January 2025
- The State of Oregon contracted Precision to perform a cost-benefit evaluation of its Surplus Property Program. The project involved extensive data collection, time-series modeling, and Monte Carlo sensitivity testing. Recommendations from our analysis were adopted in January 2025, leading to measurable efficiency gains and reallocation of underutilized assets. This case demonstrates our ability to deliver technical evaluations with communications strategies that clarify findings for policymakers and the public.

Georgia College & State University – SANE Program Evaluation

- **Client Contact:** Shantee Henry, Program Director – ANE-SANE Grant and Assistant Professor
- **Phone:** (478) 454-8780
- **Email:** shantee.henry@gcsu.edu
- **Contract Period:** 2025 – 2027
- Precision conducted an in-person mixed-methods evaluation of Georgia College's federally funded Sexual Assault Nurse Examiner (SANE) program. The project required balancing communications with faculty, administrators, and clinical partners while adhering to HRSA grant reporting standards. Our evaluation included structured interviews, thematic analysis, and survey development to measure training effectiveness and program impact. This



demonstrates our ability to manage sensitive, multi-audience communications while ensuring compliance with federal requirements.

Chattanooga State Community College – Strengthening Institutions Program (SIP)

- **Client Contact:** Traci Williams, Project Director
- **Phone:** (423) 697-2446
- **Email:** Traci.Williams@chattanoogaastate.edu
- **Address:** 4501 Amnicola Hwy, Chattanooga, TN 37406
- **Contract Value & Period:** \$21,000; November 2024 – November 2026
- Precision is currently serving as the third-party evaluator for Chattanooga State's Strengthening Institutions Program. We designed SQL-based dashboards to monitor progress, employed NVivo to analyze stakeholder interviews, and provided interim reports that allowed for real-time curriculum adjustments. Within the first semester, the institution reported a two-point increase in course completion rates. This project highlights our ability to deliver real-time, data-driven communications to inform institutional decision-making and program improvement.

Appendix A- Team Resumes

CHARLOTTE CHABOT

CO-FOUNDER

SUMMARY

As a Paris-born, London-raised executive and leader, I transformed Precision from a two-person consultancy in 2006 into a multimillion-dollar global research and strategy firm. Over two decades, I've driven growth into advanced quantitative analytics, comprehensive regulatory review, and independent ethics oversight—launching Beyond Bound IRB and affiliated brands. Recognized on the Inc. 500 list in 2009 for rapid revenue growth, I draw on data-driven discipline and international insight to build resilient, high-performance organizations.

EDUCATION

2005

BROWN UNIVERSITY | B.A. IN ECONOMICS

- Concentration in econometrics and organizational economics
- Coursework included microeconomic theory, macroeconomic analysis, econometrics, statistical methods, game theory, and public economics
- Member, Economics Club; volunteered as a peer tutor for statistics and introductory economics courses
- Served as a research assistant on faculty-led projects in labor economics and market analysis
- Completed a senior capstone applying econometric models to real-world data trends

WORK EXPERIENCE

2006 - PRESENT

PRECISION CONSULTING FIRM, LLC | CO-FOUNDER

- Named to the 2010 Inc. 500 list as one of America's fastest-growing private companies and recognized as the fastest-growing firm in Rhode Island from 2006 to 2009
- Expanded the core Statistical Consulting practice to cover biostatistics, survey development & analysis, program evaluation, qualitative business statistics, gaming & sports analytics, market research, trading-model development, big-data solutions, and sampling & validity design—serving clients across six continents
- Established the Academic Research & Dissertation Consulting division, providing end-to-end support for master's and doctoral candidates, including topic development, IRB consulting, data collection, analysis, and defense preparation
- Launched Statistical & Economic Expert Testimony services, delivering litigation-ready analyses and expert-witness support in high-stakes business and academic disputes
- Rolled out Academic Editing offerings—"Not Just APA Editing," online-university expertise, and full reference audits—to help clients polish manuscripts for publication and compliance with journal guidelines
- Forged strategic partnerships with leading academic, healthcare, and industry institutions, securing multi-year research contracts and co-development agreements
- Launched a secure client portal featuring real-time project dashboards and deliverable tracking, boosting transparency and client engagement across all project phases.

CHARLOTTE CHABOT

CO-FOUNDER

WORK EXPERIENCE

2024- PRESENT **BEYONDBOUND IRB | CO-FOUNDER & CEO**

- Created an independent institutional review board delivering rapid, compliant ethics oversight for academic, clinical, and commercial studies.
- Recruited a multidisciplinary panel (medicine, law, epidemiology, biostatistics) and secured OHRP/FDA registration in under eight months.
- Supervised 450+ protocol reviews with a median 12-day turnaround—40 % faster than peer IRBs—while maintaining flawless regulatory records.
- Launched IRB HEART, a self-paced ethics-training program that fulfills federal requirements for biomedical and social-science researchers, boosting investigator preparedness and submission quality.
- Scaled a network of 150+ subject-matter experts across all major therapeutic areas and research phases, ensuring specialist reviewers were always available.
- Introduced transparent, customized pricing models to give clients predictable costs —driving a 30 % increase in institutional service adoption in year one.
- Integrated Beyond Bound with Precision's broader research ecosystem, linking compliance review, methodology support, and training into a seamless end-to-end service.
- Maintained Federalwide Assurance (FWA00034297) and ISO-level quality standards, demonstrating continuous regulatory compliance and upholding the highest ethical benchmarks.

CORE COMPETENCIES

- Business Development & Growth Strategy
- P&L Management
- Global Operations
- Research Governance & IRB Oversight
- Econometric & Statistical Analysis
- Talent Development

SKILLS

- Strategic Planning
- Financial Forecasting
- Econometric Modeling
- Regulatory Compliance (OHRP/FDA)
- Stakeholder Negotiation
- Public Speaking
- Multilingual: English & French

CLARK GUO

VICE CHAIRMAN

SUMMARY

I am the current Vice Chairman and Co-Founder of Precision Consulting Firm, LLC—a company specializing in advanced statistical methodologies and data analysis to address complex business challenges. Under my leadership, Precision built enduring consulting relationships with Fortune 500 firms, earning a spot on the 2010 Inc. 500 list of the Fastest Growing Private Companies in America.

As an accomplished expert witness, my litigation work covers a broad range of statistical and economic topics, integrating Mathematical and Statistical Consulting, Machine Learning, Predictive Analysis, and Survey Development and Analysis throughout my professional journey. Prior to founding Precision, I completed dual bachelor's degrees in Mathematics and Economics at Caltech, followed by graduate studies in Economics at Boston University.

EDUCATION

2006 - 2007 BOSTON UNIVERSITY | MS ECONOMICS

- Specialized in advanced econometric modeling to explore complex economic phenomena.
- Conducted thorough data analysis and statistical modeling, gaining a deep understanding of quantitative research methods.
- Collaborated on research projects, making meaningful contributions to the development of economic theories and models.
- Cultivated a strong ability to apply advanced mathematical and statistical tools to address challenging economic issues.

2014 - 2016 CALIFORNIA INSTITUTE OF TECHNOLOGY | BS MATHEMATICS, BS ECONOMICS

- Gained a solid understanding of mathematical and economic frameworks, enabling thorough academic study.
- Applied mathematical methods to address real-world issues and scrutinize economic data.
- Deepened insight into economic principles and their practical effects through dedicated research.
- Strengthened critical thinking and problem-solving skills through challenging coursework and scholarly pursuits.

WORK EXPERIENCE

NOV. 2020-
PRESENT

PRECISION CONSULTING FIRM, LLC | CO-FOUNDER AND VICE CHAIRMAN

- Collaborate with the executive team to provide critical oversight and guidance for the firm's overall strategic direction, ensuring alignment with long-term goals and objectives.
- Evaluate market trends and competitive dynamics, offering insights and recommendations to enhance the firm's competitive position and sustained growth.

CLARK GUO

VICE CHAIRMAN

WORK EXPERIENCE

Jan 2006 -
Nov 2020

PRECISION CONSULTING FIRM, LLC | CO-FOUNDER AND CEO

- Launched Precision as a forward-thinking firm dedicated to addressing pressing organizational needs through advanced statistical methods, delivering effective solutions across multiple areas.
- Built enduring partnerships with numerous Fortune 500 companies by providing exceptional services in mathematical and statistical consulting, machine learning, predictive analysis, and survey development.
- Guided Precision to earn a coveted spot on the 2010 Inc. 500 list, placing the company among the Fastest Growing Private Businesses in America.
- Developed inventive strategies for handling academic and professional issues, allowing clients to concentrate on their most important goals.
- Led a diverse, expert team skilled in content creation, research, editing, formatting, and both qualitative and quantitative analysis, ensuring each client's needs are met.
- Offered specialized statistical support across various industries, including gaming and sports analytics, economic consulting, trading models, survey design and analysis, biostatistics, medical research, and market research.

KEY STRENGTHS

- Mathematical and Statistical Consulting, Machine Learning and Predictive Analysis, Survey Development and Analysis

SKILLS

- Statistical Analysis, Data Analysis, Expert Witness, Econometric Modeling, Consulting, Survey Development

IN-COURT TESTIMONY, DEPOSITION, AND EXPERT OPINION

- CPS Energy v. AT&T (Sep 2011)
- Camacho v. American Textile (May 2012)
- Lozada v. Classic (May 2011)
- Sanchez v. La Brea (October 2011)
- Barrera v. Bottega (November 2011)
- State of Kentucky v. Brighton Cornerstone, Inc. (December 2011)
- State of Ohio v. Hillbrand Rehabilitation Center (January 2012)
- State of Arkansas v. Heritage Living, Inc. (January 2012)
- State of Ohio v. Wesley Glen Services (January 2012)
- State of Kentucky v. Princeton University (January 2012)
- State of South Carolina v. Amedisys, Inc. (February 2012)
- Borjavs v. Liborio (February 2012)
- State of New York v. St. Elizabeth Centers, Inc. (February 2012)
- Gutierrez v. Vista CreditUnion (February 2012)
- State of Nebraska v. PhysMed, Inc. (March 2012)
- State of Tennessee v. Grandview Medical, Inc. (March 2012)
- State of Tennessee v. CHC Memphis, LLC (March 2012)
- Negrete v. Cerveo (March 2012)
- State of Kentucky v. Nazareth Literary & Benevolent (April 2012)
- Lopez v. Trojan (May 2012)
- Arellano v. Spotless (June 2012)
- State of Texas v. Angels Unlimited Home Health (October 2012)
- State of New Jersey v. Villa Springfield (December 2012)
- State of South Carolina v. Heritage Home of Florence, Inc. (January 2013)
- State of California v. Psychcare of Louisiana (February 2013)
- State of Arizona v. Cypress Home Care, Inc. (February 2013)
- State of Texas v. Gold Horses, LLC. (February 2013)
- State of North Carolina v. Lutheran Home at Trinity Oaks (March 2013)
- State of Ohio v. Berger Hospital (April 2013)
- State of North Carolina v. Silver Bluff, LLC. (November 2013)
- State of Chicago v. Chicago Home Healthcare Agency (January 2014)
- State of Arkansas v. Northport Health Services of Arkansas, LLC (May 2014)
- State of Philadelphia v. Crossroads Hospice of Philadelphia (June 2014)
- State of Mississippi v. Our Family Home Hospice (November 2014)
- State of Kansas v. Edwards County Hospital & Healthcare Center, LLC (November 2014)
- State of Miami v. JFK Regional Medical Center (February 2015)
- State of Virginia v. Home Nursing Service of Southwest Virginia (August 2015)
- State of Tennessee v. Methodist Healthcare (September 2015)
- State of Texas v. National Medical Home Care (February 2016)

DR. MARTIN BARUGEL, PHD

DIRECTOR, MACHINE LEARNING AND PREDICTIVE MODELING

SUMMARY

Director, Machine Learning and Predictive Modeling at Precision Consulting Firm, LLC, leading a dedicated team of over 30 analysts with expertise in advanced statistical methodologies, data analysis techniques, and extensive experience in mathematical and statistical consulting. My academic background includes a doctorate in Economics from the University of Cambridge and a Master's degree in Econometrics. Prior to my tenure at Precision, I served as a Professor of Mathematics and Theoretical Statistics at Universidad Torcuato Di Tella, where I specialized in predictive modeling, survey development and analysis, as well as biostatistics and clinical research.

EDUCATION

2000 - 2004 UNIVERSITY OF CAMBRIDGE | PHD IN ECONOMICS

- Demonstrated exceptional expertise in advanced econometric methods and mathematical modeling, strengthening the rigor of my academic work.
- Published original research findings in esteemed economics journals, contributing to scholarly discourse and expanding academic knowledge.
- Successfully defended my doctoral dissertation, highlighting my dedication to advancing economic research.

2014 - 2016 UNIVERSIDAD TORCUATO DI TELLA | BS ECONOMICS, MS ECONOMETRICS

- Developed a deep understanding of economic theory, research methodology, and advanced statistical techniques, demonstrating strong academic expertise.
- Applied econometric methodologies to real-world economic challenges, conducting rigorous data-driven analyses.
- Engaged in scholarly research and delivered impactful academic presentations, refining my ability to communicate complex concepts with clarity and precision.

WORK EXPERIENCE

JAN. 2008-PRESENT PRECISION CONSULTING FIRM, LLC | DIRECTOR, MACHINE LEARNING AND PREDICTIVE MODELING

- Lead strategic analytical planning using mathematical and statistical consulting expertise for clients like Nielsen, Smucker's, Johnson & Johnson, ESPN, and Clayton Dubilier & Rice.
- Leverage parallel computing to manage data-intensive projects efficiently, applying advanced predictive modeling.
- Develop pattern recognition systems for quality assurance in manufacturing.
- Enhance data collection instruments using exploratory structural equation modeling in collaboration with clients.
- Oversee customized applications for spatial analysis, geostatistics, and geographic sampling design.
- Implement Kalman filtering to forecast commodity prices based on state-dependent correlations.
- Create advanced algorithms that reduce computing time and enable real-time decision-making for large datasets.

DR. MARTIN BARUGEL, PHD

DIRECTOR, MACHINE LEARNING AND PREDICTIVE MODELING

WORK EXPERIENCE

- | | |
|-------------------------|--|
| JAN. 2008-
PRESENT | <p>PRECISION CONSULTING FIRM, LLC DIRECTOR, MACHINE LEARNING AND PREDICTIVE MODELING</p> <ul style="list-style-type: none"> • Developed self-improving econometric models to enhance predictions of macroeconomic metrics like the US trade balance and non-farm payroll employment. • Designed a trading system based on foreign exchange rate fluctuations driven by discrepancies between anticipated and actual macroeconomic indicators. • Optimized dynamic equilibrium models to improve extended positions in the foreign exchange market. • Led the successful transfer of the firm to a Hong Kong-based hedge fund in 2007, demonstrating expertise in economic analysis. |
| JAN. 2004-
DEC. 2007 | <p>CO-FOUNDER KB HORIZON FOREX MANAGEMENT</p> <ul style="list-style-type: none"> • Developed self-improving econometric models to predict macroeconomic metrics. • Designed a trading system leveraging foreign exchange rate fluctuations. • Optimized dynamic equilibrium models for foreign exchange market positions. • Facilitated the firm's transfer to a Hong Kong-based hedge fund in 2007. |
| JAN. 2004-
DEC. 2007 | <p>ASSISTANT PROFESSOR OF MATHEMATICS AND THEORETICAL STATISTICS UNIVERSIDAD TORCUATO DI TELLA</p> <ul style="list-style-type: none"> • Designed and conducted experiments to evaluate metagame model predictions, providing insights into economic regulation. • Taught multiple doctoral courses in Economics and Econometrics, covering topics like Dynamic Programming, Advanced Econometrics, and Panel Data Analysis. • Developed and introduced the university's first course on MATLAB, expanding academic offerings in programming and computational analysis. |

CORE COMPETENCIES

- Mathematical and Statistical Consulting, Machine Learning and Predictive Analysis, Survey Development and Analysis, Biostatistics and Clinical Research.

SKILLS

- Strategic Analytics, Cluster Computing, Neural Networks, Structural Equation Modeling, Spatial Analysis, Geostatistics, Kalman Filtering, Algorithm Development, Econometrics, Forecasting, Trading Strategies, Dynamic Equilibrium Models, Negotiation, Experimental Design, Teaching, Curriculum Development, MATLAB, Data Analysis, Research, Academic Instruction.

IN-COURT TESTIMONY AND DEPOSITION

- CPS Energy v. AT&T (Sep 2011)
- Camacho v. American Textile (May 2012)

AARON HOUSTON

CHIEF ANALYTICS OFFICER

SUMMARY

With over six years of experience in real-world evidence generation, health outcomes research, and value evidence strategy, I have successfully managed both qualitative and quantitative health projects across diverse topics. I hold a Master of Public Health in Epidemiology from Temple University and a Bachelor of Science in Biology from Howard University. My expertise includes data analysis, manuscript preparation, and statistical programming using SAS/SUDAAN, with experience collaborating with organizations such as the CDC. Additionally, I have a strong background in biostatistics, clinical research, health economics, and grant writing. Beyond research, I have held leadership roles in student associations and remain actively engaged in community service and public speaking.

EDUCATION

- MAY 2021 TEMPLE UNIVERSITY | MASTER OF PUBLIC HEALTH IN EPIDEMIOLOGY (M.P.H.)**
- Thesis: "Vision Payment Claims Analyses with Health Insurance"
 - Thesis Advisor: Dr. Krys Johnson, Department of Epidemiology and Biostatistics
- JUNE 2019 HOWARD UNIVERSITY | BACHELOR OF SCIENCE IN BIOLOGY, MINOR IN CHEMISTRY**
- Earned a Bachelor of Science in Biology, establishing a strong foundation in the life sciences.
 - Minored in Chemistry, gaining a comprehensive understanding of the physical and chemical principles of scientific research.

WORK EXPERIENCE

- AUGUST 2023- PRESENT PRECISION CONSULTING FIRM, LLC | CHIEF ANALYTICS OFFICER**
- Lead a multidisciplinary team of analysts, engineers, scientists, and BI experts to ensure operational efficiency and collaborative project execution.
 - Translate complex data insights into strategic recommendations for executive leadership and board-level decision-making.
 - Oversee daily analytics operations, driving innovation in data methodologies and strengthening team performance.
 - Spearhead development of advanced analytic techniques and manage deliverables across data engineering and business intelligence functions.
 - Utilize tools such as Mplus, SPSS/AMOS, SAS, MAXQDA, and Tableau to conduct robust analyses, support grant writing, and deliver client-focused visual insights.
- AUGUST 2022- AUGUST 2023 PRECISION CONSULTING FIRM, LLC | PROJECT MANAGER**
- Managed a global client base and team of analysts through daily communication, effectively conveying the value of educational consulting services.
 - Clearly articulated service impact on client projects, leveraging a strong academic research background.
 - Applied meticulous attention to detail to review and refine deliverables, ensuring high-quality outcomes.



AARON HOUSTON

CHIEF ANALYTICS OFFICER

WORK EXPERIENCE

AUGUST 2021- AUGUST 2022 CENTERS FOR DISEASE CONTROL AND PREVENTION | ORISE RESEARCH FELLOW

- Conducted literature review and data analysis for CDC DASH using YRBS, ABES, and School Health Profiles, applying SAS/SUDAAN and ArcGIS for statistical and spatial insights.
- Co-authored manuscripts and presentations, collaborating with CDC staff and experts while supporting research coordination and public health messaging.

CORE COMPETENCIES

- Biostatistics, Statistical Consulting, and Grant Writing & Research Funding

SKILLS

- Health Economics & Outcomes Research, SAS/SUDAAN Statistical Software, Manuscript Writing, Real-World Data Analysis, Microsoft Office, Public Speaking, and Spanish

CONFERENCE PRESENTATIONS

- Houston, A. M. (2020, October). APHA Film Festival, APHA Virtual Annual Meeting and Expo.

PROFESSIONAL ORGANIZATIONS

- American Public Health Association (APHA), American Chemistry Society (ACS), National Society of Leadership and Success(NSLS), National Society of Collegiate Scholars (NSCS), National Parks Conservation Association (NPCA)

PUBLICATIONS & PRESENTATIONS

- Houston, A. M., Ruskiwicz, J., Gaal, J. M., Baviskar, C. M., & Latimer, A. (2021). Vision payment claims analyses with health insurance. *CommonHealth*, 2(3), 85–93. Biostatistics & Clinical Research, Mathematical & Statistical Consulting, and Grant Writing & Research Funding
- Jones, S. E., Ethier, K. A., Hertz, M., DeGue, S., Le, V. D., Thornton, J., Lim, C., Dittus, P. J., & Geda, S. (2022). Mental health, suicidality, and connectedness among high school students during the COVID-19 pandemic - Adolescent Behaviors and Experiences Survey, United States, January–June 2021. *MMWR Supplements*, 71(3), 16–21. Biostatistics & Clinical Research, Mathematical & Statistical Consulting, and Grant Writing & Research Funding
- Kilmer, G., Jones, S., Rico, A., Houston, A., Lim, C., Leon-Nguyen, M., & Asher, A. (2024). Changes in illicit drug use among high school students in Southeastern U.S. states—2009 to 2019. *Journal of Prevention*, 45, 815–831. Biostatistics & Clinical Research, Mathematical & Statistical Consulting, and Grant Writing & Research Funding

SZAMOR WILLIAMS

CHIEF EXPERIENCE OFFICER

SUMMARY

Seasoned Chief Experience Officer with over 11 years of international experience in marketing, business development, and strategic growth. Recognized for driving revenue, elevating global brand presence, and leading innovative AI-driven initiatives. A proven leader in crafting impactful marketing strategies, optimizing the customer journey, and championing diversity and inclusion across platforms. Skilled in B2B and B2C engagement, stakeholder collaboration, team leadership, and research operations, with additional expertise in SEO, brand positioning, and program evaluation. Dedicated to cross-functional alignment and achieving measurable business outcomes through thoughtful strategy and exceptional execution.

EDUCATION

2004-2010 FURMAN UNIVERSITY | B.A. IN COMMUNICATION STUDIES

- Concentrated on mass media and rhetorical theory to analyze semiotics, language, and audience impact.
- Developed foundational skills in corporate communication strategy and high-level messaging for broad audiences.

2004-2010 FURMAN UNIVERSITY | B.A. IN PHILOSOPHY

- Emphasized applied social philosophy and ethics, with particular attention to how individual and communal choices shape societal outcomes.
- Conducted research exploring the role of perspective in moral reasoning and collective decision-making processes.

WORK EXPERIENCE

2025- PRESENT PRECISION CONSULTING FIRM, LLC | CHIEF EXPERIENCE OFFICER

- Direct firm-wide client experience strategy, aligning research, marketing, and operations to ensure consistent service excellence.
- Lead AI integration to streamline service delivery and elevate client satisfaction across the project lifecycle.
- Oversee cross-sector engagements in healthcare, education, public policy, and corporate research, ensuring high-quality execution.
- Translate client insights into scalable strategies for onboarding, communication, and workflow optimization.

2023-2025 PRECISION CONSULTING FIRM, LLC | CHIEF OPERATING OFFICER

- Designed and delivered international training programs for analysts, coders, and web developers in qualitative and quantitative research methodologies.
- Generated over \$2.1 million in revenue through strategic marketing, AI solution development, and enhanced global positioning.
- Directed multimillion-dollar research operations across sectors including business, marketing, clinical research, higher education, and public policy.
- Executed a \$247K quarterly Google AdWords campaign and led program evaluation initiatives for government and private-sector clients to optimize impact.

SZAMOR WILLIAMS

CHIEF EXPERIENCE OFFICER

WORK EXPERIENCE

- | | |
|-----------|--|
| 2022-2023 | PRECISION CONSULTING FIRM, LLC CHIEF STRATEGY OFFICER <ul style="list-style-type: none"> Led strategic planning efforts across product marketing, program evaluation, and data analytics to drive organizational growth and performance. Built cross-industry partnerships, developed internal team capacity, and advised executive leadership using market insights to inform business strategy. |
| 2021-2022 | PRECISION CONSULTING FIRM, LLC MANAGING DIRECTOR <ul style="list-style-type: none"> Built and managed a portfolio of 470+ clients in 15 months while achieving record-breaking individual sales performance at both monthly and annual levels. Led biopharmaceutical and healthcare research and evaluation initiatives, delivering tailored insights aligned with client objectives. |
| 2018-2022 | PRECISION CONSULTING FIRM, LLC PROJECT MANAGER & INTERIM MARKETING COORDINATOR <ul style="list-style-type: none"> Conducted daily B2C and B2B sales outreach, consistently leading the firm in customer satisfaction and phone conversion performance. Led SEO, brand positioning, and social media strategies to strengthen online presence and drive lead generation. |
| 2014-2019 | MEASURED WORDS OWNER <ul style="list-style-type: none"> Created marketing content for international and domestic clients, tailored to business objectives and audience needs. Led strategic market planning for clients in healthcare and education, aligning messaging with industry goals. Developed targeted SEO copy to boost visibility and engagement across digital platforms. |

CORE COMPETENCIES

- Program Evaluation
- Educational Consulting
- Qualitative Analysis
- Biostatistics
- Clinical Research

SKILLS

- Stakeholder collaboration; training program evaluation; resource management; content development; high-performance team coaching; expert relationship management; excellent interpersonal skills; results-driven and goal-oriented.

RAYA JOSON

DIRECTOR OF QUALITATIVE RESEARCH

SUMMARY

Experienced qualitative methodologist and data analyst with 12 years of expertise in phenomenology, systematic reviews, content analysis, and thematic analysis. Having completed over 700 qualitative projects, I bring a deep understanding of research designs and analytical techniques across diverse fields. Highly proficient in NVivo for qualitative data coding and analysis, with additional experience using MAXQDA and Atlas.ti. Skilled in Excel for data coding, analysis, and interpretation, ensuring accurate and meaningful insights. Committed to advancing qualitative research methodologies, I stay up to date with emerging techniques and best practices to enhance data-driven decision-making.

EDUCATION

MAY 2009-
OCTOBER 2012 **DE LA SALLE UNIVERSITY | BACHELOR OF ARTS, MAJOR IN ORGANIZATIONAL COMMUNICATION**

- Developed a strong foundation in communication theories, organizational dynamics, and strategic practices, demonstrating academic excellence.
- Applied communication methodologies to real-world organizational challenges, crafting effective strategies and delivering ideas with clarity and impact.
- Graduated with Honorable Mention, reflecting a commitment to academic rigor and achievement.
- Achieved a final CGPA of 3.374, showcasing strong academic performance.

WORK EXPERIENCE

JANUARY 2025
- PRESENT **PRECISION CONSULTING FIRM, LLC | CHIEF OF STAFF**

- Oversee strategic operations and cross-functional initiatives, ensuring alignment with organizational goals and efficiency in daily workflows.
- Manage executive communications, stakeholder relations, and internal processes to enhance decision-making and organizational effectiveness.
- Lead special projects, policy development, and team coordination, fostering collaboration and driving key business objectives forward.

APRIL 2024-
PRESENT **PRECISION CONSULTING FIRM, LLC | DIRECTOR OF QUALITATIVE RESEARCH**

- Lead qualitative research initiatives, ensuring methodological rigor and delivering insightful analysis across diverse projects.
- Oversee data collection, thematic analysis, and systematic reviews to support client research objectives.
- Manage a team of qualitative researchers, providing guidance on best practices, coding techniques, and software utilization.
- Conduct online NVivo walkthroughs, training clients and researchers on qualitative data coding and analysis.
- Develop qualitative research strategies and frameworks to enhance project outcomes and client decision-making.

RAYA JOSON

DIRECTOR OF QUALITATIVE RESEARCH

WORK EXPERIENCE

AUGUST 2023-
JANUARY 2024

**PRECISION CONSULTING FIRM, LLC | DIRECTOR OF PROMPT
ENGINEERING**

- Utilized AI technologies to optimize internal processes and streamline workflows.
- Developed engaging and effective content for websites and communication tools, ensuring clarity and consistency.
- Refined AI-generated prompts using qualitative expertise to enhance relevance and accuracy.
- Collaborated with cross-functional teams to integrate AI-driven solutions into research and business strategies.
- Analyzed AI performance metrics to continuously improve prompt engineering techniques and output quality.

JANUARY 2013-
AUGUST 2023

PRECISION CONSULTING FIRM, LLC | QUALITATIVE ANALYST

- Developed a meticulous and detail-oriented approach to qualitative data analysis, drawing from early experience with manual coding.
- Contributed to over 700 qualitative projects, assisting with coding, results interpretation, and presentation.
- Interpreted qualitative findings and aligned results with relevant theories and literature to ensure well-supported insights.
- Utilized NVivo, MAXQDA, and Atlas.ti for qualitative data coding, thematic analysis, and research synthesis.

CORE COMPETENCIES

- Qualitative Research & Analysis, Research Design & Methodology, Data Coding & Interpretation, Academic Writing & Reporting, and Ethical & IRB Compliance

SKILLS

- Manual Qualitative Coding, NVivo and Excel for Qualitative Analysis, Thematic Analysis, Phenomenology, Content Analysis, Systematic Reviews, Aligning Research Findings with Theories and Literature, Data Presentation and Reporting for 700+ Projects, AI-Enhanced Qualitative Research, and Qualitative Research Communication

AWARDS AND RECOGNITIONS

- 2009–2010: Dean's Lister (1st–3rd Term); Jose Rizal Awardee for consecutive Dean's List achievement
- 2010–2011: Dean's Lister (1st–3rd Term); Consecutive Dean's Lister Awardee
- 2011–2012: Dean's Lister (2nd–3rd Term); Consecutive Dean's Lister Awardee

ALEXANDRA CAPLAN

RESEARCH METHODOLOGIST

SUMMARY

I hold a PhD in Geography from Oregon State University and a Master of Arts in International Relations and Middle East Politics, supported by a distinctive academic background in Physiology and Middle Eastern Studies. My professional journey spans educational consulting, clinical research, and program evaluation, grounded in experience coordinating educational initiatives and providing patient care. I bring fluency in Spanish and working knowledge of Arabic and Hebrew, along with a proven ability to navigate diverse cultural and professional contexts. My research has centered on environmental governance and water resource management, areas that demand both methodological rigor and interdisciplinary thinking. This combination of analytical depth and cross-sector versatility makes me well suited for work that intersects data, policy, and program implementation. I am also passionate about globetrotting, reading, and engaging with different cultures.

EDUCATION

2018 - 2022

OREGON STATE | PHD IN GEOGRAPHY

- Research Focus on Urban Sustainability: Actively engaged in researching urban sustainability, exploring the intersection of geography, urban development, and environmental resilience. Investigating strategies for creating sustainable and equitable urban spaces.
- Expertise in Geographic Information Systems (GIS): Proficient in utilizing Geographic Information Systems for spatial analysis and mapping. Applying GIS techniques to study geographical patterns, environmental changes, and urban dynamics, contributing to the advancement of geographical research methodologies.
- Collaborative Research on Regional Climate Change Impacts: Collaborating on research initiatives focused on the impacts of climate change at the regional level. Investigating how geographical factors contribute to climate change vulnerability and resilience, with a goal to inform policies and practices for sustainable adaptation.

2015- 2018

UNIVERSITY OF LEEDS | MASTER OF ARTS IN INTERNATIONAL RELATIONS AND POLITICS OF THE MIDDLE EAST

- Focus on Israeli-Palestinian conflict, contemporary Middle Eastern politics, the environment conflict nexus, and theories and patterns of intrastate violence.
- Research interests include environmental governance, transboundary water conflict, environmental peacebuilding, and water resource management.
- Dissertation: Israeli-Palestinian Water Cooperation: Preserving Inequalities or Promoting Peace – 60 page thesis that examined the dynamics of cooperative interactions over transboundary water resources between Israeli and Palestinian communities and the contribution they can have towards the wider peace process.

2015- 2018

UNIVERSITY OF ARIZONA | BACHELOR OF SCIENCE IN PHYSIOLOGY AND BACHELOR OF ARTS IN MIDDLE EASTERN STUDIES, CUM LAUDE

- Recipient of Wild Cat Scholarship.
- Dean's List, Academic Year Academic Distinction Spring 2014. Dean's List, Fall 2014.
- Study abroad, Summer 2013, Al-Ahliyya Amman University, Amman, Jordan

ALEXANDRA CAPLAN

RESEARCH METHODOLOGIST

WORK EXPERIENCE

- 2019 **CHILDREN'S CENTER FOR NEURODEVELOPMENTAL STUDIES | TEACHING ASSISTANT**
- Provided personalized educational consulting to students with autism and other learning disabilities through one-on-one and small group instruction.
 - Designed and implemented weekly lesson plans tailored to each student's learning style and needs, while preparing monthly progress reports for parents.
 - Tracked academic and behavioral data using both qualitative observations and quantitative metrics, collaborating closely with teachers and behavioral specialists to develop and refine individualized education plans (IEPs).
- 2018- PRESENT **PRECISION CONSULTING FIRM, LLC | RESEARCH METHODOLOGIST**
- Led qualitative research using grounded theory and inductive methods, and designed surveys in Qualtrics to support diverse evaluation and consulting projects.
 - Conducted statistical analysis using techniques such as regression, structural equation modeling, and mediation/moderation analysis across clinical, educational, and program evaluation contexts.
 - Utilized tools including Mplus, SPSS/AMOS, SAS, MAXQDA, and Tableau to analyze data and create impactful visualizations for stakeholders.
- 2018- PRESENT **ENVIRONMENTAL LAW INSTITUTE | VISITING RESEARCHER**
- Conducted research and curated scholarly content for the Environmental Peacebuilding program's online library, contributing to a conflict sensitivity initiative.
 - Collaborated with UN Environment and academic partners to coordinate and enhance a global MOOC on Environmental Security and Sustaining Peace.
 - Supported course delivery as a teaching assistant, refining materials, assisting with multilingual translation, and facilitating student engagement through forums and virtual office hours.

CORE COMPETENCIES

- Educational Consulting, Biostatistics and Clinical Research
- Program Evaluation
- Qualitative Analysis

SKILLS

- Manual Qualitative Coding, NVivo and Excel for Qualitative Analysis, Thematic Analysis, Phenomenology, Content Analysis, Systematic Reviews, Aligning Research Findings with Theories and Literature, Data Presentation and Reporting for 700+ Projects, AI-Enhanced Qualitative Research, and Qualitative Research Communication



Appendix B- Insurance Certificate



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)
7/26/2024

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER Gild Insurance Agency 16192 Coastal Hwy Lewes, DE 19958	CONTACT NAME: Maggie Andersen PHONE (A/C, No, Ext): 302.300.1810 E-MAIL: maggie@yourgild.com ADDRESS: INSURER(S) AFFORDING COVERAGE INSURER A: Sprinkler Insurance Company INSURER B: Benchmark Insurance Company INSURER C: INSURER D: INSURER E: INSURER F:	FAX (A/C, No): NAIC # 24376 41394
INSURED Precision Consulting Firm, LLC 1980 Festival Plaza Dr Ste 200 Las Vegas, NV 89135-2930		

COVERAGES

CERTIFICATE NUMBER:

REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADOL SUBR INSD WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC <input type="checkbox"/> OTHER	X X	CSG-00179846-00	08/01/2024	08/01/2025	EACH OCCURRENCE \$ 2,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 50,000 MED EXP (Any one person) \$ 5,000 PERSONAL & ADV INJURY \$ 2,000,000 GENERAL AGGREGATE \$ 4,000,000 PRODUCTS - COMP/OP AGG \$ 4,000,000
	AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> NON-OWNED AUTOS ONLY					COMBINED SINGLE LIMIT (Ea accident) \$ BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$
	<input type="checkbox"/> UMBRELLA LIAB <input type="checkbox"/> OCCUR <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED RETENTION \$					EACH OCCURRENCE \$ AGGREGATE \$
	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/OWNER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N <input type="checkbox"/> N/A				<input type="checkbox"/> PER STATUTE <input type="checkbox"/> OTR. ER EL EACH ACCIDENT \$ EL DISEASE - EA EMPLOYEE \$ EL DISEASE - POLICY LIMIT \$
B	Professional Liability		CBP-00179847-00	08/01/2024	08/01/2025	Per Claim \$1,000,000 Aggregate for all claims \$3,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

CERTIFICATE HOLDER

Proof of coverage

CANCELLATION

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE

Margaret Andersen

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ACORD 25 (2016/03)

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APPENDIX B
Office of the State Treasurer

Request for Proposals - Communications and Marketing Consultants

**PROSPECTIVE CONTRACTOR'S REPRESENTATION REGARDING
CONTINGENT FEES**

Precision Consulting Firm, LLC (Company name) represents that it HAS / HAS
NOT (please circle the appropriate answer) retained any person or agency on a percentage,
commission, or other contingent arrangement to secure this contract.

Signed 

Print Name Charlotte Chabot

Title Co-Founder

Date 09 / 23 / 2025
MM DD YY



