

TECHNICAL PROPOSAL

RFP No. 3120003221

Communications and Marketing Consulting Services

Submitted: October 14, 2025

Section I – General Information for Respondents

Per the instructions in the RFP, the Respondent hereby acknowledges each subsection under Section I.

- 1.1 Purpose of RFP** – Acknowledged.
- 1.2 Overview of the OST and Responsibilities** – Acknowledged.
- 1.3 Glossary of Terms** – Acknowledged.
- 1.4 Acknowledgement of Amendments** – Acknowledged.
- 1.5 Timetable** – Acknowledged.
- 1.6 Proposal Deadline** – Acknowledged.
- 1.7 News Releases** – Acknowledged.
- 1.8 Benefit** – Acknowledged.
- 1.9 Standard Contract** – Acknowledged.
- 1.10 Period of Contract** – Acknowledged.
- 1.11 Invoicing Information** – Acknowledged.
- 1.12 Type of Contract** – Acknowledged.
- 1.13 Ownership of Materials** – Acknowledged.
- 1.14 Independent Contractor Status** – Acknowledged.
- 1.15 Security / Nondisclosure Statement** – Acknowledged.

Section II – Scope of Services Response

2.1.1 Marketing Strategy

Response:

The Respondent will assist the Office of the State Treasurer (OST) in the development and implementation of annual and long-term marketing strategies for all OST programs, including the College Savings Plans of Mississippi (CPSM), the Mississippi Affordable College Savings Program (MACS), and the Unclaimed Property Program.

The Respondent has extensive experience providing strategic marketing support for state-administered savings and financial-education programs. Through long-standing partnerships with similar public-sector clients, the Respondent has developed a deep understanding of how to communicate complex financial information in ways that build trust and drive participation. Because of this prior experience, the discovery

and onboarding phase with OST will be streamlined, allowing the team to quickly align on strategy, messaging, and goals while maintaining the rigor and attention to detail required for public communications.

Approach

The Respondent will collaborate with OST staff to:

A. Advertising through radio and television

- Develop creative concepts and media plans for radio and television campaigns designed to raise awareness of OST programs statewide.
- Manage production and placement of broadcast ads, ensuring messages are simple, memorable, and accessible.

B. Creation of commercial creative and production of spots

- Script, design, and produce broadcast-ready TV and radio spots.
- Manage casting, editing, sound design, and final delivery of creative assets in compliance with state production standards.

C. Assist with Internet marketing campaigns

- Plan, design, and execute paid digital campaigns across social, search, video, and display platforms.
- Develop creative variations and optimize placements based on real-time performance analytics.

D. Marketing to civic organizations and community events

- Coordinate participation in statewide civic organizations, conferences, and local events.
- Develop materials and presentations tailored for community audiences to build program awareness.

E. Marketing to employers in the state and promotion of college savings plans as an employee benefit

- Create outreach campaigns and toolkits for Mississippi employers.
- Support OST staff in promoting CPSM and MACS as voluntary employee benefits through HR and benefits communications.

F. Marketing to communities to increase awareness of the Unclaimed Property Program

- Design educational campaigns to help Mississippians search for and claim their unclaimed property.
- Partner with community organizations, libraries, and local media to distribute information and encourage participation.

G. Display and booth setup at conventions, association meetings, fairs, etc.

- Provide creative design and production for branded booths, signage, and displays.
- Identify and recommend high-traffic community and event placements across the state where OST's presence will reach target audiences most effectively.

H. Assist with updates to the Treasury website

- Recommend and develop content updates that align with campaign messaging.
- Ensure web content reflects the latest OST programs, enrollment information, and campaign calls-to-action.

I. Public affairs and media relations for the Executive Office

- Support OST leadership in communicating major initiatives and announcements.
- Draft press releases, talking points, and media statements to ensure clarity and consistency in public communications.

J. Assist with direct mailings to targeted groups

- Develop creative content for direct mail and email campaigns.
- Coordinate production, printing, and distribution through approved vendors.

K. Assist with advertising through sports marketing entities

- Identify and recommend strategic sports marketing partnerships (e.g., collegiate or professional organizations).
- Manage creative execution and media placement to ensure alignment with OST's statewide awareness goals.

Estimated Schedule and Time Commitment

- **Strategy and Planning:** Ongoing throughout the contract term, dedicated to developing and maintaining marketing strategy, campaign planning, and coordination with OST staff.
- **Deliverables:** Discovery audit and findings, annual marketing plan, campaign briefs, creative calendar, audience targeting reports, and post-campaign summaries.

Manpower and Responsibilities

The Respondent will assign the following functional roles:

- **Account Lead:** Oversees coordination, schedules, and overall project alignment with OST objectives.
- **Strategy Director:** Conducts market research, messaging, and segmentation.
- **Creative Director:** Provides campaign creative oversight and quality review.
- **Media Manager:** Develops and maintains media plans and optimizations.
- **Project Manager:** Tracks tasks, deliverables, and approvals.

Total annual estimated hours for marketing strategy and account oversight: **1200 hours.**

Acknowledged.

2.1.2 Marketing Materials Design

Response:

Building on the strategic foundation established in Section 2.1.1, the Respondent will translate OST's communications objectives into fully realized creative materials across print, digital, social, and in-person channels. The goal of this phase is to deliver clear, engaging, and visually cohesive materials that help Mississippians easily understand and act on the benefits of OST's programs.

The Respondent has extensive experience producing and managing the full suite of deliverables required under this scope, including digital and social campaigns, educational materials, enrollment collateral, and environmental displays and booth design for community events. This experience allows the team to move efficiently from concept through production, minimizing onboarding time while maintaining exceptional quality, compliance, and accessibility across every format.

Deliverables

Materials may include, but are not limited to:

A. Mississippi Prepaid Affordable College Tuition Enrollment Booklet

- Design and update the comprehensive enrollment booklet containing program descriptions, rules, disclosures, and application forms.
- Ensure all content is visually clear, compliant, and aligned with OST's approved messaging and design standards.

B. Single-Sheet Flyers

- Develop single-sheet flyers to promote Unclaimed Property and College Savings programs across a variety of channels (conventions, payroll deduction fairs, publications, and social media).
- Tailor design and messaging for different audiences, ensuring all materials are accessible, brand-consistent, and easily adaptable across formats.

C. Fold-Over Brochures

- Design bi-fold or tri-fold brochures for use by Unclaimed Property and CSPM programs.
- Create layouts that prioritize readability, visual engagement, and clear calls-to-action for events, banks, and libraries statewide.

D. Posters and Display Stands

- Develop poster designs and display graphics promoting OST programs for use in public spaces, offices, and community locations.
- Ensure all designs follow brand guidelines and accessibility best practices.

E. Banners for Fairs and Conventions

- Create branded banners and signage announcing Unclaimed Property and CSPM for display at fairs, conventions, and similar venues.
Identify and recommend strategic community and event placements across Mississippi where these materials will maximize visibility and engagement.

Approach

All creative development will be directly informed by the broader marketing strategy outlined in Section 2.1.1. Messaging hierarchy, tone, and design direction will be grounded in campaign objectives, audience segmentation, and data insights established during the planning phase. This alignment ensures every creative asset reinforces OST's statewide communication goals and delivers consistent, measurable impact across all programs.

The Respondent employs a disciplined, collaborative workflow that ensures efficiency, compliance, and visual consistency across all programs:

1. **Creative Brief Development** – Translate strategic insights into clear objectives, messaging, and creative direction.
2. **Concepting and Design** – Develop print, digital, and environmental assets that are inclusive, compelling, and visually cohesive.
3. **Internal Quality Review** – Conduct peer and managerial reviews to verify alignment with messaging, brand standards, and accessibility compliance (ADA/WCAG 2.1).
4. **OST Review and Approval** – Present design drafts, incorporate feedback, and finalize assets for production.

Estimated Schedule and Time Commitment

- **Average Effort per Piece:** 90 hours.
- **Estimated Quantity:** 10 standalone pieces annually.
- **Timeline:** 2–4 weeks from concept to final production per piece.
- **Production:** Printing and fabrication billed at vendor cost; design labor included in hourly rate.

Manpower and Responsibilities

Functional roles will include:

- **Creative Director** – Leads design direction and ensures brand and creative consistency.
- **Designer(s)** – Develop layouts, graphics, and environmental displays for print, digital, and event use.
- **Copywriter** – Crafts concise, accessible messaging for all materials.
- **Account Lead** – Oversees schedules, OST approvals, and vendor coordination.

Acknowledged.

2.1.3 Evaluation of Communication and Marketing Results

Response:

The Respondent will measure the effectiveness of marketing efforts using quantitative and qualitative data to inform future strategy. Reporting will include campaign performance, awareness levels, and program participation outcomes. Evaluation will include both awareness and behavioral outcomes, such as new account openings and unclaimed-property claims, providing OST with insight into both reach and impact

Approach

- Establish baseline awareness and participation metrics.
- Track engagement using analytics from digital platforms, paid media, and OST events.
- Provide monthly dashboards summarizing active campaigns.
- Deliver quarterly and annual written reports with analysis, findings, and recommendations.

Estimated Schedule and Time Commitment

- **Total Annual Hours:** 190 hours per year.
- **Deliverables:** Monthly dashboards, quarterly summaries, annual report, and presentation to OST staff.

Manpower and Responsibilities

- **Analytics Lead** – Compiles and interprets campaign data.
- **Strategy Director** – Develops insights and recommendations.
- **Account Lead** – Presents findings and facilitates discussions with OST staff.

Acknowledged.**2.2 Experience Requirement****Response:**

The Respondent exceeds the required five years of experience in communications and marketing, with extensive, long-term experience supporting state agencies, public-savings programs, and mission-driven organizations. This experience includes large-scale public-awareness efforts for statewide college-savings initiatives, ABLE savings programs for individuals with disabilities, and promoting unclaimed-property recovery.

The Respondent's team collectively offers an average of 15–20 years of professional experience across strategy, creative, media, and analytics disciplines, ensuring that every aspect of campaign planning, execution, and evaluation is guided by seasoned professionals familiar with the unique requirements of statewide public-sector marketing.

Acknowledged.

Section III – Additional Information for Respondents

3.1 Format for Proposals – Acknowledged

The Respondent has prepared this proposal in accordance with the structure, order, and sequence outlined in RFP #3120003221.

3.2 Proposal Format – Acknowledged

The Respondent has followed the prescribed format and numbering of the RFP and has responded to every section as instructed. All sections outside the Scope of Services (Section II) have been acknowledged, and every requirement within Section II has been addressed in detail with methodology, manpower, and schedule information.

3.3 Sufficiency of Proposal – Acknowledged

The Respondent has provided detailed responses to each required service under Section II, including approach, manpower, and estimated time to completion. All tasks are feasible within the timelines stated, and all proposed roles are staffed by personnel with relevant expertise.

Section IV – Evaluation

Acknowledged.

The Respondent understands the evaluation criteria and minimum scoring requirements described in the RFP and acknowledges that proposals will be reviewed according to those factors.

Section V – Terms and Conditions

Acknowledged.

The Respondent accepts all terms and conditions as described in Section V of the RFP, including applicable Mississippi laws, contractual provisions, and approval requirements.

Conclusion

The Respondent acknowledges and agrees to meet all specifications and requirements outlined in RFP #3120003221.

All services will be performed in accordance with the Scope of Services, timelines, and deliverables described herein.

Acknowledged.

COST PROPOSAL

RFP No. 3120003221

Communications and Marketing Consulting Services

Submitted: October 14, 2025

Section 3.4 – Fee Information

The Respondent proposes a **flat hourly rate of \$180 per hour** for all professional services described in Section II of this RFP. This rate applies uniformly across all categories of work and personnel levels.

All media placement, printing, and production costs will be billed at **actual vendor cost** with **no markup or commission**.

All labor associated with project management, coordination, or optimization of these activities is included in the proposed hourly rate.

Appendix A – Pricing Schedule

Service	Proposed Price
Strategic Consulting / Account Management	\$180 per hour
Creative Development / Design / Copywriting	\$180 per hour
Media Planning & Optimization (Labor Only)	\$180 per hour
Evaluation & Reporting	\$180 per hour
<i>All media and print billed at actual vendor cost (no markup)</i>	—

Estimated Annual Level of Effort and Cost

Based on the Scope of Services outlined in Section II of the Technical Proposal, the Respondent anticipates the following approximate level of effort, to be finalized in collaboration with the Mississippi Office of the Treasury:

Service Category	Estimated Hours / Basis	Rate	Estimated Annual Cost (USD)
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2.1.1 Marketing Strategy & Account Oversight	1200 hrs/over 12 months (≈ 108 hrs/a month)	\$180/hr	\$215,000
2.1.2 Marketing Materials Design, Execution & Production Coordination	975 hrs/year (10 deliverables × ≈ 90 hrs)	\$180/hr	\$175,000
2.1.3 Evaluation & Reporting	≈ 190 hrs/year	\$180/hr	\$45,000
Media Management & Optimization (Labor Only)	275-525 hrs/year	\$180/hr	\$50,000-\$95,000*
Total Estimated Annual Services	—	—	\$485,000-\$530,000
<i>Excludes all pass-through media and print costs. We anticipate a media spend at \$200K-\$500K</i>			
<i>*Media Management costs dependent on overall media budget</i>			

Billing and Invoicing Terms

- All invoices will be submitted **monthly in arrears**, per Section 1.11 of the RFP.
- No retainers, upfront payments, or commissions will be requested.

Assumptions

- The hourly rate includes all labor categories and internal overhead (strategy, creative, production, and analytics).
- Media and production are pass-through expenses, billed at cost and paid directly by OST or reimbursed per state accounting procedures.
- The Respondent is willing to negotiate adjustments to scope, deliverables, or pricing as mutually agreed upon with OST during contract finalization.

Acknowledgment

The Respondent acknowledges that this Cost Proposal was prepared in accordance with the requirements of Section 3.4 of RFP #3120003221 and that all proposed rates and pricing structures are valid for a period of at least 90 days following submission. **Acknowledged.**

MANAGEMENT PROPOSAL

RFP No. 3120003221

Communications and Marketing Consulting Services

Submitted by Thesis Agency

October 14, 2025

Section 3.5 – Respondent’s Organization and Credentials

Agency Overview

Thesis Agency is a full-service agency that partners with organizations doing meaningful work to help them reach and inspire the people they serve. Headquartered in Portland, Oregon, Thesis is a Certified B Corporation, meeting the highest verified standards of social and environmental performance, transparency, and accountability.

Our agency operates at the intersection of creativity, data, and purpose, helping government agencies, public programs, and mission-driven organizations communicate clearly, inclusively, and effectively. From state-administered savings programs to large-scale awareness and conversion driven campaigns, Thesis combines strategy, creativity, and analytics to drive measurable impact.

Our approach balances craft and accountability: every idea must not only connect emotionally but perform tangibly. That dual focus has earned Thesis national recognition, including:

- *Inc. 5000* Fastest-Growing Private Companies in America
- *Portland Business Journal* Innovation in Philanthropy Award
- *Portland Business Journal* Most Admired Companies

Organizational Structure

Thesis operates through four integrated departments that collaborate across every project:

1. **Strategy** – Audience segmentation, message development, and campaign planning.
2. **Creative** – Copywriting, visual design, and creative production across all formats.

3. **Media & Analytics** – Media planning, performance tracking, and data visualization.

4. **Account & Production** – Project management, client communication, and vendor coordination.

An organizational chart illustrating key leadership roles and team connections is provided in **Appendix E**.

Key Personnel

Name	Role	Responsibilities	Experience Summary
KC Anderson	Account Director	Oversees all OST communications, timelines, and coordination between OST and Thesis teams.	20+ years in marketing and production management; 8+ years supporting state financial programs.
Kimber Conway	Strategy Director	Leads strategy development, research, and messaging frameworks.	12 years in marketing strategy and research; 5 years in public-sector financial campaigns.
Evan Corpuz	Creative Director	Oversees all creative concepting, design direction, and brand consistency.	20 years of design and brand experience; award-winning creative leadership.
Matt Monnin	Production Director	Oversees all aspects of creative production, from concept development through delivery. Manages timelines, vendor partnerships, and cross-department collaboration.	20 years of Marketing experience in an agency environment, 7 years at Thesis supporting OCSP and Oregon ABLE
Nicole Griffin	Head of Accounts	Manages staffing, budgets, and operational alignment across teams.	18 years in account leadership and client operations.
Alex Orr	Media & Analytics Lead	Manages campaign tracking, reporting, and performance optimization.	10 years in digital media and analytics.
Abby Hoffman	Design Lead	Develops layouts, event graphics, and print-ready collateral.	8 years in creative design and production.
Elizabeth Harney	Writing Lead	Develops messaging and copy for all campaign, digital, and print materials; ensures tone, clarity, and	12+ years of writing & marketing experience and 6

		accessibility across communications.	years working with Oregon Treasury at Thesis
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Resumes for all key personnel are included in **Appendix E**.

Percentage of Time Available for OST Contract

Each key team member has been assigned to this engagement with sufficient availability to ensure seamless execution of all deliverables. The following table outlines estimated time commitments for the contract term:

Name / Role	% of Time Dedicated to OST
KC Anderson – Account Lead	15%
Kimber Conway – Strategy Director	20%
Evan Corpuz – Creative Director	5%
Nicole Griffin – Head of Accounts	5%
Alex Orr – Media & Analytics Lead	20%
Abby Hoffman – Senior Designer	20%
Elizabeth Harney – Writing Lead	10%
Matt Monnin – Creative Production Lead	5%

These percentages reflect average engagement levels throughout the year; additional support resources will be deployed as needed during peak campaign and production periods.

Statement of Willingness to Provide On-Site Support

Thesis Agency confirms its full willingness and capacity to provide on-site support in Mississippi as needed. Key staff are available to travel for discovery sessions, media events, conventions, or public outreach activations.

All travel arrangements and costs will comply with state travel policies and be pre-approved by OST prior to incurring any expenses.

Current Clients Using Similar Services

Thesis currently provides comparable strategic, creative, and media services to the following clients:

Client	Contact Name	Title	Email / Phone
Embark FKA Oregon College Savings Plan	Kasey Krifka	Marketing & Communications Director	Kasey.Krifka@ost.state.or.us 971.900.7215
Upward Oregon FKA Oregon Treasury Savings Network	Ryan Mann	Executive Director	Ryan.Mann@ost.state.or.us 503.373.1903
Counter Culture Coffee	Penelope Hearne	E-Commerce Manager	phearne@counterculturecoffee.com 919.213.0190

These references represent ongoing relationships involving statewide/national marketing campaigns, creative development, and multi-channel communications strategies.
OST is authorized to contact each reference listed above to verify experience and performance.

Certification of Compliance with Current Contracts

Thesis Agency certifies that it is in full compliance with all current contracts, including those with state and municipal agencies.

The agency is in good standing with all clients and has no outstanding obligations, disputes, or performance deficiencies that would impact its ability to fulfill this contract.

Acknowledged.

Section 3.6 – Quality Management Practices

Thesis maintains a structured, multi-layered quality management process to ensure every deliverable meets or exceeds client expectations for accuracy, compliance, accessibility, and effectiveness.

Quality Assurance Framework

1. **Peer Review** – Each deliverable is reviewed by a cross-functional team member to validate content accuracy, clarity, and adherence to objectives.
2. **Departmental Review** – Creative, Strategy, and Account Directors review all materials for compliance, accessibility (ADA/WCAG 2.1), and quality.

3. **Final Approval** – The Principal Producer performs final checks before client submission to ensure consistency and completeness.

Performance Reporting

Quality is tracked through measurable performance indicators including on-time delivery, accuracy rate, and post-campaign success metrics.

Post-campaign and quarterly reports are provided to clients summarizing campaign performance, insights, and recommendations for improvement.

Accessibility and Compliance

All creative and communications materials are reviewed for ADA and WCAG 2.1 compliance to ensure accessibility for diverse audiences across Mississippi.

Acknowledged.

Section 3.7 – Plan to Implement Scope of Services

Thesis will implement the Scope of Services outlined in Section II through a proven, structured process that ensures clarity, efficiency, and measurable outcomes.

Our process is rooted in four core phases, Discover, Define, Design, and Deploy, each with clear milestones, deliverables, and collaboration points with OST. This framework has guided our successful long-term partnerships with state-administered savings programs and public-awareness initiatives.

Implementation Plan

Phase	Timeline	Focus	Key Activities	Primary Deliverables
Phase 1 – Discover	November – December 2025	Foundation	Conduct kickoff and alignment sessions; review existing OST materials and performance data; define KPIs and audience priorities; confirm creative and media goals.	Discovery report, strategic brief, project schedule

Phase 2 – Define	January – February 2026	Strategy & Planning	Develop the annual marketing plan; identify key messages, audience segments, and media mix; build campaign calendar and content framework; confirm measurement plan.	Annual Marketing Plan, message framework, content roadmap
Phase 3 – Design	March – September 2026	Creative & Production	Create campaign assets and materials, including digital, print, and event collateral; develop creative concepts; produce content; manage reviews, approvals, and vendor production.	Campaign creative, design templates, production-ready files
Phase 4 – Deploy	Ongoing	Execution & Optimization	Launch campaigns, manage media delivery, oversee events and community outreach, analyze results, and refine strategies based on performance data.	Campaign activations, monthly dashboards, quarterly and annual reports

Detailed Implementation Steps

1. Discovery and Alignment

- Conduct onboarding meetings with OST leadership and program teams.
- Review past campaigns, creative materials, media reports, and performance data.
- Identify existing challenges, key audiences, and short- and long-term objectives.
- Develop an annual work calendar integrating media planning, creative cycles, and reporting milestones.
- Confirm communication and approval protocols to ensure seamless collaboration.

Outcome: A shared understanding of priorities, key success metrics, and operating rhythm between Thesis and OST.

2. Strategic Development (Define Phase)

- Translate insights into a unified strategy for all OST programs (CPSM, MACS, and Unclaimed Property).
- Develop message hierarchy, creative positioning, and key campaign themes.
- Build an integrated channel plan spanning paid, owned, and earned media.
- Present a comprehensive annual marketing plan for OST approval.

Outcome: A strategy that aligns all OST communications under one cohesive message platform and audience plan.

3. Creative Production (Design Phase)

- Translate strategy into tangible creative executions, print, digital, social, and environmental.
- Design and produce materials such as enrollment brochures, digital toolkits, event banners, and outreach collateral.
- Manage internal quality control and accessibility checks (ADA/WCAG 2.1).
- Oversee all vendor production, printing, and fabrication at cost.
- Coordinate timelines and delivery with OST's marketing and communications team.

Outcome: High-quality, on-brand creative materials and experiences delivered on time and within budget.

4. Campaign Execution and Optimization (Deploy Phase)

- Launch integrated campaigns across approved channels.
- Manage day-to-day execution, trafficking, and creative deployment.

- Provide ongoing reporting and analytics dashboards summarizing reach, engagement, and conversions.
- Conduct quarterly performance reviews with OST staff to assess outcomes and make data-driven adjustments.
- Deliver an annual summary report and recommendations for the following year's strategy.

Outcome: Continuous optimization and transparent performance reporting that drive measurable improvements over time.

Communication and Collaboration Plan

To maintain transparency and alignment with OST, Thesis will establish a clear communication cadence:

- **Internal production meetings** to track project status and identify potential roadblocks early.
- **Biweekly check-ins with OST staff** to review progress, align priorities, and confirm deliverables.
- **Quarterly performance meetings** to review results, optimize tactics, and plan upcoming campaigns.

Thesis will use collaborative tools (such as Asana, Airtable, and Slack) to manage deliverables, deadlines, and communication logs. All documents will be accessible to OST in shared project folders to ensure visibility and accountability.

Quality and Performance Assurance

Throughout all phases, Thesis will maintain:

- **Written timelines and task trackers** reviewed weekly.
 - **Deliverable sign-off checkpoints** for accuracy, accessibility, and quality.
 - **Ongoing performance measurement** against established KPIs and OST objectives.
-

Summary

This plan ensures every aspect of the Scope of Services, from strategic planning through campaign execution and reporting, is delivered efficiently, collaboratively, and with accountability at every step. Thesis's deep experience managing similar statewide communications programs allows us to streamline discovery, minimize onboarding time, and deliver measurable, high-quality results from day one.

Acknowledged.

Section 3.8 – Use of Subcontractors

Thesis Agency does not anticipate the use of subcontractors for this contract.

If subcontractors become necessary for specialized production or media-buying support, OST will be notified in advance and provided with all required documentation and approvals in accordance with state procurement policies.

Acknowledged.

Section 3.9 – Regulatory Restrictions and Litigation

Thesis Agency certifies that:

- It has **no pending litigation, consent decrees, or regulatory restrictions** that would affect its ability to perform this contract.
- It has **no conflicts of interest** related to the Office of the State Treasurer or the State of Mississippi.

Acknowledged.

Appendices

- **Appendix A:** Pricing Schedule (included in Cost Proposal)
- **Appendix B:** Representation Regarding Contingent Fees, Gratuities, and Certification of Independent Price Determination (included in Management Proposal)
- **Appendix C:** Release of Proposal as Public Record (included in Management Proposal)
- **Appendix D:** Acknowledgement of Amendment (included in Management Proposal)

- **Appendix E:** Organizational Chart and Key Staff Resumes (included in Management Proposal)
- **Appendix F:** Creative Samples and Case Studies

Conclusion

Thesis Agency brings the experience, structure, and proven processes to deliver the highest-quality communications and marketing services to the Office of the State Treasurer.

Our team has successfully partnered with multiple state-administered savings programs and public-awareness initiatives, experience that ensures we can begin quickly, operate efficiently, and deliver measurable results for Mississippi residents.

Acknowledged.

Appendix B – Representation Regarding Contingent Fees, Gratuities, and Certification of Independent Price Determination

1. Representation Regarding Contingent Fees

Thesis represents that it has not retained any person, agency, or organization on a percentage, commission, or other contingent arrangement to secure this contract.

2. Representation Regarding Gratuities

Thesis represents that it has not, is not, and will not offer, give, or agree to give any employee or former employee of the Office of the State Treasurer (OST) any gratuity, gift, payment, or offer of employment in connection with any approval, disapproval, recommendation, development, or any other action or decision related to this solicitation or any resulting contract.

Thesis further represents that no employee or former employee of OST has or is soliciting, demanding, accepting, or agreeing to accept a gratuity or offer of employment for any of the aforementioned reasons, and that any such action, if discovered, will be rejected by the Offeror.

Thesis affirms that it is in full compliance with the Mississippi Ethics in Government Laws, codified at Mississippi Code Annotated §§ 25-4-101 through 25-4-121, and has not solicited any employee or former employee to act in violation of said law.

3. Certification of Independent Price Determination

By submitting this proposal, Thesis certifies that the prices submitted were determined independently, without any consultation, communication, or agreement with any other Offeror or

competitor, and without intent to restrict competition.

4. Prospective Contractor's Representation Regarding Contingent Fees

Thesis again affirms that it has not retained any person or agency on a percentage, commission, or other contingent arrangement to secure this contract.

Company Name: Thesis

Signed:



Print Name: **Matt Monnin**

Title: Production Director

Date: 10/22/2025

APPENDIX C: Release of Proposal as Public Record

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

Company Name: Thesis

Signed:



Print Name: **Matt Monnin**

Title: Production Director

Date: 10/22/2025

APPENDIX D: Acknowledgement of Amendments

This thesis acknowledges receipt of the amendment RFx 3120003221 Amendment #1 to the RFP delivered on October 15, 2025.

Company Name: Thesis

Signed:



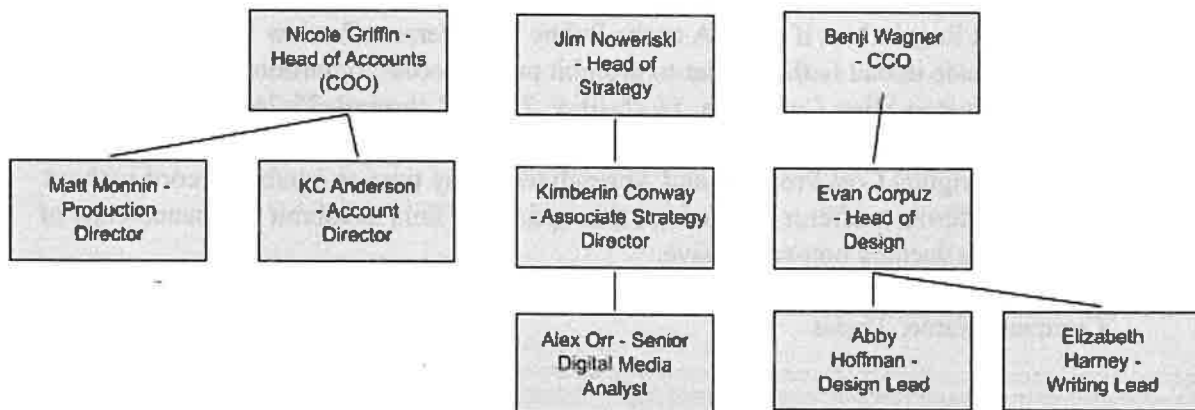
Print Name: Matt Monnin

Title: Production Director

Date: 10/22/2025

Appendix E – Organizational Chart and Key Staff Resumes

Organizational Chart



Key Staff Resumes

Design Lead + Creative Manager

Accomplished Design Lead and Creative Manager passionate about driving creative excellence and innovation. I excel in leading dynamic teams and shaping impactful design narratives that resonate with audiences. With a keen eye for detail and a commitment to conceptual integrity, I thrive on crafting

compelling visual stories that inspire and engage. My leadership style is rooted in fostering collaboration and empowering talent through thoughtful mentorship and constructive feedback, consistently elevating creative standards and achieving exceptional results.

Experience

[REDACTED]

April 2022 – Present

Thesis | Portland, OR

- Utilize deep knowledge of design theory (color, type, and layout) and digital applications (Adobe Creative Suite + Figma) to produce and manage creative strategies for various digital projects (email, web, motion) and cross-platform marketing campaigns on high-profile global accounts
- Lead small, focused teams while reviewing and providing feedback on visual designs to maintain brand standards, design ethos, and alignment with project goals.
- Maintain a detail-oriented approach to project management, ensuring timely delivery while embracing ambiguity and adapting to a fast-paced design environment
- Regularly evaluate, optimize, and evolve workflows and processes across personal, team, and organizational levels to correct inefficiencies and improve throughput.

Senior Creative Specialist

April 2023 – Aug 2023

PGIM Investments | Remote

- Conceptualized, presented, and executed multi-channel digital assets (web, social, email, presentation materials, UX/UI), translating business needs into engaging B2B solutions that capture brand and market positioning
- Collaborated with cross-functional teams, supporting creative operations to execute relevant and intentional designs using brand identity systems
- Executed visual storytelling through graphic design (typography, composition, layout) and animation for digital mediums
- Ensured consistency in brand voice, style, and messaging across all creative assets and channels, and curate a best-in-class consumer journey.

Senior Designer

Oct 2021 – March 2022

PMG | Portland, OR

- Developed concepts and digital marketing cross-platform campaigns that fueled B2B experiences including emails, direct mail, landing pages, micro-sites, infographics, paid social, presentations, ebooks, and other collateral
- Adapted to constant change while balancing multiple projects at once
- Maintained consistent client relationships and presented design concepts on a weekly cadence
- Provided detailed design feedback and direction to junior designers.

Senior Creative Manager

Feb 2018 – Oct 2021

Quadmark | Remote

- Collaborated with a cross-functional team of content developers, animators and designers to develop best-in-class motion graphics, interactive e-learning, and various digital experiences for global brands including PayPal, Google, HP, Uber, Amazon and Samsung
- Ensured brand consistency, maintained/managed creative resources and mentored small team of junior designers and interns.

Communications Designer

Nov 2015 – Feb 2018

Nike | Beaverton, OR

- Executed and designed creative materials across various print and multimedia channels for Nike's Advanced Innovation department and internal entrepreneurial hub, Valiant Labs.
- Worked closely with Communications Director and internal creative teams to develop brand standards, various collateral and design templates
- Amplified internal communications skills and practices related to typography, imagery and visual storytelling.

Skills

- Expert knowledge of industry software (Adobe CC + Figma)
- Cross-platform campaign solution
- UX/UI + Website design
- Creative brand positioning
- Typography, color theory, illustration and brand design
- Strategic thinker and problem solver
- Dedicated creative team leadership

Tools

- Figma
- Adobe CC
- Microsoft Office Suite
- Google Workspace
- Airtable / Asana / Notion
- Various AI platforms

Education

**Bachelor of Science (BS),
Visual Communication Design**
Arizona State University
Cume Laude

UX Design Institute
UX/UI Design Program
Received certificate of completion

MARKETING EXPERIENCE

Thesis – Portland, OR – Sept. 2022 to Present

Digital Media Analyst, Thesis – Portland, OR – Jan. 2022 to Sept. 2022

- Manage planning, buying, and optimization for client campaigns across multiple channels, including Google Ads, Paid Social, and Programmatic (Audio/Display/Digital OOH/Video).
- Develop and analyze detailed reports to evaluate performance during campaign execution and conduct post-campaign analysis to inform future tactics and strategies.

Digital & SEO Marketing Specialist, Franz Bakery – Portland, OR – Nov. 2020 to Jan. 2022

- Developed, coordinated, and implemented digital marketing campaigns to drive retail and ecommerce sales through various platforms including Google Ads, Instacart, social media, and email marketing.
- Created and implemented weekly content/copy for digital marketing across multiple platforms and brands to support initiatives that include product launches, contests, and community engagement.
- Collaborated with internal and external departments to craft and curate the brand identity for multiple brands including Franz, Naked Bread, and Seattle Sourdough Baking Company.

Media Platform Manager, Kroger – Portland, OR – Sept. 2017 to October 2020

- Executed large multi-channel campaigns by managing their strategy, in platform buying, and optimization with programmatic display, social, and video platforms while coordinating streaming audio buys with outside agencies.
- Created and analyzed detailed campaign reporting to evaluate effectiveness and performance during campaign lifespans as well as post-campaign analysis to determine new strategies and tactics for future efforts.
- Oversaw and tracked the budgets and billing process for campaigns from conception to invoicing.
- Refined and evaluated departmental processes such as buying standards and brand safety which led to stronger campaign KPIs, improved efficiency, and less manual touchpoints.

Associate Technical Producer (Contract), Mathys+Potestio (Nike) - Portland, OR – Spring 2017

Marketing Coordinator, Lilly's Hummus - Portland, OR – Nov. 2015 – Feb. 2017

- Generated and executed B2B and consumer facing marketing plans for the Lilly's Hummus brand including event coordination, promotions, and social media.

Sales Coordinator (Temp), NBC Consumer Products - Universal City, CA - Spring 2013

NBC Page, NBC Universal - Universal City, CA - 2011 - 2012

Marketing Account Coordinator, Beeline Group - Hayward, CA – 2011 – Clients: HP and Adobe

PUBLICITY EXPERIENCE

Press Guide, AMPAS (Academy Awards) - Hollywood, CA - 2011-2018 Academy Awards

Intern, NBC TV Distribution Publicity - Universal City, CA - Fall 2010

Intern, Universal Pictures International Publicity - Universal City, CA - Summer 2010

EDUCATION

B.A. Journalism, University of Oregon - Eugene, OR - 2010

- Advertising Concentration
- Scandinavian Minor – Norwegian Language



- I craft compelling creative campaigns that drive consumer engagement, improve brand awareness, and ultimately increase sales. The digital world is noisy, but I know that the right message at the right time can make all the difference.
- With a background in art, technology, and strategy, I work well with teammates from every discipline, and I'm well-versed at finding creative, strategic solutions for problems.
- My work for diverse brands like the Oregon College Savings Plan, the Oregon ABLE Savings Plan, Adobe Creative Cloud, Taco Bell, and Intel ensures I can harness any brand voice to tell a unique story.

Skills

Copywriting / Script Writing / Editing / Social Content / Storytelling / Creative Direction

Creative Concepting / Strategic Thinking / Pitching & Presenting / Team Building

Experience



JUNE 2022 - PRESENT, Portland, OR

- Promote storytelling through bespoke social content, videos, emails, TV ads, audio scripts, and website copy for the Oregon College Savings Plan, the Oregon ABLE Savings Plan, Adobe Creative Cloud, Taco Bell, and more.
- Collaborate with strategy, design, partner services, and development teams to ensure everything we make is on brand — and on brief.

- Guide multi-channel creative campaigns from ideation to delivery in a fast-paced agency environment. This includes pitching ideas, brainstorming campaigns, creating content, supporting a team of writers, and presenting deliverables to the client.
- Use metrics to track creative campaign performance and inform future initiatives.

Thesis / Senior Writer

APRIL 2019 - JUNE 2022, Portland, OR

- Interviewed 47 artists and used those insights, narratives, and quotes to write over 100 long-form editorial and SEO-optimized articles for Adobe.
- Collaborated with strategy and design teams to create short and long form copy for brands like the Oregon ABLE Savings Plan, the Oregon College Savings Plan, Intel, and Adobe.
- Helped create a new design system for Adobe to guide email and social content creation across workstreams.

Bonfire / Copywriter and Content Strategist

2014-2019, Portland, OR

- Wrote and edited paid social content, emails, websites, and blog copy for local and global B2C and B2B brands (including the Power Rangers, Omission Brewing, Yahoo, The Nature Conservancy, Intel, and Northwest Self Storage).
- Created an email nurture campaign that increased Yahoo Small Business leads by 200%.
- Produced over 600 pieces of content each month.

Education

Willamette University, Atkinson Graduate School of Management / MBA

2014, Willamette MBA Scholar, Focused on Marketing and Communications

Willamette University / BA

2013, Major in Fine Art, Minor in Art and Technology, Cum Laude

[REDACTED], leader, and storyteller.

Thesis Agency | Portland, OR

[REDACTED]

Directed agency-wide creative vision across brand, content, and digital teams. Unified strategy, design, and production for cohesive, high-performing campaigns. Defined long-term growth strategy with executive leadership. Championed innovation in AI tools, branded campaigns, and digital experiences. Served as executive creative lead for top-tier clients.

Group Creative Director 2024-2025

Led multiple creative teams across branding, content, and experiential work. Built scalable systems to improve collaboration, consistency, and delivery. Mentored senior creative leads and improved team performance. Led creative on major new business pitches and client expansions.

Creative Director 2020-2024

Directed brand and campaign work across digital, retail, and content channels. Guided strategy and execution for high-visibility lifestyle clients. Built brand systems adaptable across global and local markets. Set quality standards and fostered a high-performing creative culture. Aligned creative with business goals through collaboration with strategy and account teams.

HereNow Creative | Portland, OR

Design Director 2019-2020

Led cross-functional teams through concept to execution for lifestyle brands. Developed creative strategy for Nike, Nordstrom, and Columbia Sportswear. Shaped agency's creative vision and digital-first approach. Hired, trained, and developed the creative team. Created briefs and frameworks to raise creative standards. Defined strategic goals in partnership with executive leadership.

Senior Lead Designer 2016-2019

Led pitches that secured Nike, Lyft, and Sorel accounts. Built internal capabilities in 3D, experiential retail, and photography. Managed team resources to meet deadlines, budgets, and priorities. Developed estimates and project goals aligned with budget and margin targets.

Senior Designer 2012-2016

Standardized presentation formats and internal creative processes. Launched asset libraries and documentation to boost efficiency and quality. Designed and pitched Nike concepts that drove new business and team growth. Created global brand guidelines and managed external execution partners. Navigated high-volume, deadline-driven studio operations.

Mobi PCS | Honolulu, HI

Lead Designer 2008-2012

Led branding across advertising, packaging, and experiential retail for a telecom brand. 05Used market research to launch new products in emerging markets. 04Improved customer experience to drive satisfaction and retention.

Studio One East | Chicago, IL

Graphic Designer

Designed and produced global campaigns for Fortune 500 brands.
Developed expertise in digital tools, production, and materials.

Valparaiso University / BSFA in Design and Visual Communications - 2003

SUMMARY

Versatile and strategic marketing leader with a strong record of driving successful traditional and digital campaigns across a wide range of industries. Recognized for combining visionary thinking with meticulous execution, and for fostering collaboration while inspiring high-performing teams. Highly organized, proactive, and adaptable—thrives in dynamic, fast-paced environments with a positive, solutions-focused approach. Brings energy, creativity, and resilience to every challenge. Personally passionate about travel, the outdoors, and creating lasting experiences with family.

PROFESSIONAL EXPERIENCE

- Lead the development and execution of multi-channel digital marketing campaigns—including websites, emails, display banners, landing pages, and social media—guiding projects from concept through completion.
- Oversee creative direction, resource planning, budgeting, and timeline management across strategy, design, and development teams; coordinate closely with partner agencies to deliver cohesive, high-impact campaigns.
- Facilitate and lead strategic planning and brainstorming sessions, aligning internal and client teams to project goals and objectives.
- Serve as primary client liaison, ensuring all deliverables meet brand standards, exceed expectations, and are delivered on time and within budget.
- Deliver exceptional client service to national brands through presentations, proposals, and day-to-day relationship management.

EEG Inc., Travel Director · Various domestic and international locations · January 2007 – May 2008

- Collaborated with event agencies to plan and execute high-profile corporate conferences and incentive programs worldwide.
- Coordinated with hotel teams and vendors to manage lodging, catering, entertainment, registration, production, and transportation logistics for events with up to 9,000 attendees.
- Provided concierge-level service to Fortune 500 clients, ensuring a seamless, memorable experience for corporate executives and their teams.

Nike Inc., Marketing Intern & Marketing Specialist · Beaverton, Oregon · June 2005 – April 2006

- Led marketing research focused on consumer customization and usability for the NIKEiD platform, including organizing focus groups of over 150 employees and analyzing competitive benchmarks.
- Presented research findings to the Global Marketing team, informing key UX and feature updates to the NIKEiD site.
- Partnered with the NIKEiD web team to provide ongoing recommendations for enhancing digital user experience.

- Acted as liaison between the Global Marketing team and seven international NIKEiD Studios—communicating initiatives, gathering feedback, and managing marketing materials and product orders.

SKILLS

Computer Skills – Proficient in Windows and Mac Operating Systems, Microsoft Office Suite, Content Management Systems (e.g. WordPress, Drupal, etc.), Email Service Providers (e.g. ExactTarget, Silverpop, Campaign Monitor, etc.), Google Analytics, Project Management Applications (e.g. Asana, Harvest, Instagantt, etc.) and Basic HTML

Language Skills – Proficient in spoken and written Spanish

EDUCATION

Oregon State University · Magna Cum Laude · Corvallis, Oregon · Graduated June 2005
B.A., Business Administration (Marketing and International Business Options); Spanish Minor

University of San Francisco-Quito · Cumbaya, Ecuador · Winter and Spring 2004 · Six-month Spanish study-abroad program

Mendel University · Brno, Czech Republic · Fall 2005 · Six-month International Business study-abroad program

AFFILIATIONS

Oregon State Division I Volleyball Alumni · Corvallis, Oregon · August 2000 – December 2004
Academic All District Squad 2001-2004; Pac-10 All-Academic 1st Team 2004; 2nd Team Selection CoSIDA 2004

[REDACTED]

Multifaceted strategist and creative hybrid helping brands find their why & translating complex ideas and concepts into rich stories for lasting impact

WORK

[REDACTED]
[REDACTED]

- Lead strategic direction to develop insightful, actionable creative marketing strategies
 - Oversee integrated marketing plans aligned to client goals, partnering closely with creative, media, and production leads
- Guide internal teams and ensure strategic alignment
 - Manage and mentor strategists; partner with Head of Strategy to drive department growth and cross-team collaboration

Senior Strategist (remote), Thesis agency

Portland OR, | October 2021 – Present

- Support overall strategic direction for clients to help develop meaningful and actionable creative marketing strategies
 - Oversee and build strategic marketing plans with a clear actionable story that meets client goals and priorities
 - Develop client-facing and internal briefing documents that guide creative development
- Collaborate with internal teams on digital campaign development

Strategist (remote), Thesis agency

Portland OR, | October 2020 - October 2021

- Created strategic approaches to directly support client's brand, social, and digital strategies and priorities
 - Conducted subject matter interviews to gather and distill detailed research into concise briefs
 - Aided in driving agency brand evolution through strategic social planning, which included social, content, and channel strategy, as well as quarterly social planning

Social Media Manager, Thesis agency

Portland OR, | August 2019 - October 2020

- Actively bridged the gap between the agency's social sphere and its brand by acting as a liaison between departments to meet social needs and agency goals
 - Concepted, produced, and collaborated with designers to execute social media content and campaigns
 - Managed social channels, internal brand workflows, and editorial calendar to ensure top-notch social engagement and all assignments stayed on track

Brand Coordinator, Brand Communications, Swift

Portland, OR | June 2017 - July 2019

- Contributed to the overall development of the digital and social strategy for Swift's brand that boosted reach among prospective new business, talent, and a more connected employee experience
 - Responsible for concepting, creating, and curating majority of agency social and website content in support of the agency's overarching goals

Community Manager, Swift

Portland, OR | February 2015 - June 2017

- Served as the voice of well-known brands by managing social media channels, editorial calendars, publishing content, and analyzing metrics to support marketing strategies
 - Collaborated Performance to provide strategic insights about target audiences to build and improve campaign strategies

- Partnered with Strategy to build out social strategies, social media playbooks, and community management best practices

EDUCATION

University of Portland

Portland, OR | 2014

B.B.A., Marketing; minor in Fine Arts

Study Abroad Program: Humanities

Salzburg Austria | Summer 2012



OVERVIEW

Accomplished Production leader with 20 years of diverse experience across CRM, web, mobile, social media, motion, and more. Expert in establishing best practices, financial management, and team leadership with a human-centric approach to fostering collaboration and talent development

EXPERIENCE

Thesis Agency. Inclusive, innovative, marketing agency, Portland, OR



- Manage and develop a team of 5 Producers
- Lead successful project execution across 14 clients
- Implemented a holistic agency management system that improved operational efficiency

Associate Director Project Management *Sep 2022 - Mar 2023*

- Managed team of 5-7 Project Managers
- Facilitated change management during an agency reorganization
- Standardized financial oversight and resourcing processes

Senior Project Manager, Team Lead *Jun 2021 - Sep 2022*

- Managed team of 5-7 Project Managers
- Led agency of record partnership with Oregon Treasury Savings Network
- Owned Taco Bell partnership relationship, 3M in annual billing

Senior Project Manager *Oct 2020 - Jun 2021*

- Project lead across 5 clients
- Established Project Management department
- Standardized project workflow

Project Manager *Aug 2017 - Oct 2020*

- PM lead for several key partnerships
- Managed web, eCommerce, social and email programs
- Introduced new estimation and timeline templates
- Improved consistency within time tracking, and improved timeliness of time entry
- Collaborated on training and optimization of internal development process

AbelsonTaylor. Health + wellness marketing agency, Chicago, IL

Associate Director of Project Management *Feb 2015 - Sep 2016*

- Oversaw 19 Project Managers and \$38M in annual revenue
- Spearheaded the transition to an Account Management and Project Management model
- Led the successful rollout of Workamajig software

Manager of Digital Production *Aug 2011 - Feb 2015*

- Mentored 5 Producers
- Responsible for half of the agency's roster of clients
- Wrote and administered digital process and training materials for Creative, Account, and Producers
- Orchestrated agency's iOS app distribution process
- Established formal pre-production and project closeout processes

Senior Digital Producer *Jan 2009 - Jul 2011*

- Managed an average of 15-20 projects, ranging \$10K-\$500K budgets
- Served as subject matter expert for all tablet + iPad applications
- Handled several agency initiatives including training, AT brand identity, and agency website
- Hired, trained, and managed Junior Producer staff

Digital Producer *Jul 2007 - Dec 2008*

- Built a reputation as expert in agency process, project details, and technical instruction for all levels of staff

- Effectively managed all web, video, banner, email, animation, and application development projects
- Enhanced troubleshooting and creative problem solving capabilities
- Developed timelines, scoped projects, managed budgets, contribute to annual scope planning

Associate Digital Producer *Jan 2006 - Jun 2007*

- Produced agency's first interactive visual aid
- Managed a number of complex digital projects and initiatives (average ~10-15 concurrent projects)
- Developed strong relationships with a wide variety of external vendors

Account Coordinator *Jul 2005 - Dec 2005*

- Orchestrated timelines and status meetings for all agency digital/interactive work
- Established familiarity with various project types including web, video, banner, email, experiential

Traffic Coordinator *Feb 2005 - Jun 2005*

- Coordinated routing and review of all projects across five brands
- Leveraged entry-level position to establish reliable reputation across agency

EDUCATION

St. Edward's University, Austin, Texas | B.A. in Communication, Multimedia Production | 2002



Hello, it's nice to meet you.

I am a dynamic heart-centered senior leader with 17 years of proven success driving organizational growth at the intersection of Marketing, Digital Products, and Brand Strategy across agency and in-house environments. Recognized for combining strategic vision with customer-obsessed execution, I transform business challenges into market opportunities by fostering cultures of innovation and excellence. My collaborative leadership style empowers teams to challenge the status quo while delivering measurable results for both clients and the business.

Professional Experience

Amazon

Head of Entertainment, Campaign & Creative Management Sept 2022 - Present

Sr. Manager, Campaign & Creative Management May 2022 - Sept 2022

Leads a high-performing media and creative campaign management organization of 51 FTEs, including 6 Senior Managers and 45 Campaign Managers. Develops annual US Entertainment advertising strategy, operational readiness, and organizational roadmap to achieve business objectives. Responsible for the quality of service and campaign and partnership results across 75+ Entertainment clients, inclusive of Amazon Ad's Top 5 Enterprise level accounts. Drives over \$1.2B in annual revenue through strategic planning, innovative solutions, and cross-functional collaboration.

- Manages team responsible for executing integrated media campaigns and digital brand experiences across Amazon platforms. Delivers exceptional customer experiences while exceeding advertising partner goals, consistently achieving 20%+ Year-over-Year (YoY) revenue growth
- Drives end-to-end advertising operations strategy for the Entertainment category, meeting financial targets through strengthening partner relationships
- Cultivates strategic partnerships with agencies and client direct while simultaneously driving proactive solutions across internal teams, including marketing, creative, retail, sales, account management, product, design, and finance
- Serves as Amazon Ads leadership stakeholder for all Device Product launches, overseeing global go-to-market readiness, training, and implementation. Led Prime Video's app relaunch in 2024, managing 153+ clients and protecting \$94MM+ in launch revenue
- Manages resource allocation, budgeting, and operational performance indicators. Spearheaded international locale hiring expansion, achieving 36% team migration and 25% reduction in operating expenses in 2024.
- Recruits and develops high-performing teams through strategic hiring and coaching. Maintains above-benchmark manager satisfaction rates and increased team job satisfaction by 1,378 basis points (bps) as measured by daily employee surveys

barre3

CMO July 2020 - April 2022

VP Marketing and Digital Jan 2020 - June 2020

Director of Marketing Sept 2017 – Dec 2019

Served as Chief Marketing Officer (CMO) at Barre3, leading digital, marketing, and creative teams. Championed change through implementation of comprehensive business initiatives, including company-wide brand strategy and new advertising practices. Developed and launched a new franchise marketing model to drive profitability. Led digital transformation by replatforming and relaunching digital products, while establishing strategic partnerships to increase brand awareness. Key achievements over four-year tenure: Hired and developed a world-class team, doubled digital subscription business, grew brick-and-mortar studio business by 40%, earned recognition from Business Insider as one of the 10 fastest-growing digital fitness brands in 2020.

- Led company's 3-year brand strategy and annual marketing initiatives across multiple brands and channels, including digital product roadmap development.

- Redesigned brand strategy by establishing clear customer segments and lifecycle marketing strategy and conceived compelling seasonal brand narratives that consistently surpassed brand awareness and community centric KPIs
- Developed and executed annual marketing plans that exceeded acquisition and retention targets and financial goals through innovative brand concepts, consumer marketing strategies, and strategic partnerships
- Led cross-functional collaboration with retail, digital, product, content, technology, and sales teams to implement consumer-focused initiatives
- Recruited, developed, and mentored in-house marketing, creative, and digital teams while sourcing and managing relationships with key external partners including advertising, PR, social, and digital agencies
- Directed marketing, creative, and digital budget allocation and reporting in partnership with COO and CFO
- Championed and implemented company-wide DEI initiatives, resulting in new employee training programs and a comprehensive DEI roadmap

Brand Strategy & Marketing Consultant, Freelance Art Director & Photographer

March 2014 - May 2022

Select clients include: Warner Brothers Music Entertainers, Universal Music Group Artists, West Elm, The Citizenry, Parachute Home, Charity Water, Manduka Yoga, Run Janji

- Served as brand marketing and creative strategy consultant for fitness, lifestyle, entertainment, home, and mission centric companies and personal brands
- Provided full-service campaign conceiving, art direction, production, and photography services

Manduka Yoga

Sr Marketing Manager + Art Director March 2013 - Nov 2014

Led marketing and creative teams in transforming an early-stage yoga gear startup into an international premium retail brand. Developed and implemented comprehensive marketing strategies across B2B and B2C channels, including community engagement programs and multi-channel retail initiatives. Expanded brand portfolio from yoga equipment to a complete lifestyle brand, successfully launching and managing the company's entry into the premium apparel market.

- Developed and executed comprehensive 3-year and annual marketing strategies across brand, B2C, B2B, PR, and experiential channels
- Partnered with CEO to execute current brand strategy while developing expansion plans through strategic category acquisition and new product launches.
- Led Business-to-Consumer (B2C) and Business-to-Business (B2B) marketing strategy, creative conceiving, and campaign execution across all marketing channels.
- Expanded retail market presence through targeted brand marketing initiatives and strategic partnerships with major global retailers (e.g., REI, Dick's Sport Goods, Nordstrom)
- Developed and launched new product categories to strengthen brand position and capture additional market segments

- Created and managed 3,000-member ambassador program to drive seasonal campaigns and fitness/yoga initiatives
- Directed marketing and creative teams while overseeing annual marketing budget allocation and resource planning

4D, Publicis Group

Account Supervisor Dec 2012- March 2013

Account Manager Sept 2011 - Nov 2012

Served as founding team member at 4D, a Publicis Group subsidiary awarded the Disney advertising account for home entertainment, gaming, and theatrical divisions. Successfully scaled the agency from launch to 100 employees within three months and proactively identified continuous agency growth opportunities. Established operational infrastructure and streamlined processes across departments to ensure quality of service while managing evolving dynamics of multiple stakeholders.

- Created scalable account management framework serving 55+ Disney stakeholders across brand, creative, and media teams for newly established agency
- Developed and flawlessly executed integrated digital marketing campaigns for theatrical and home entertainment releases, inclusive of Marvel's inaugural Avenger's title, Avengers Assemble which broke highest grossing opening weekends domestically and internationally.
- Managed campaign budgets and optimizations ranging from \$70K to \$5M for Disney, Marvel, and Pixar properties
- Served as primary liaison between Disney and creative agencies providing art direction and overseeing brand compliance and approvals across all digital assets, including sensitive embargo materials
- Built and maintained relationships with key Disney departments and Senior Stakeholders including media, strategic planning, creative, PR, analytics, and finance
- Delivered data-driven media and creative insights that improved campaign performance and efficiency

The Seattle Times

Online Marketing Manager Jan 2010 - Sept 2011

Led data-driven market research to guide organization's digital transformation, resulting in successful implementation of digital initiatives and driving the strategic prioritization of the company's first mobile app launch

- Developed, led, and executed comprehensive marketing, public relations, and promotional strategies for all new media products and promotions
- Led creative direction and authored briefs for consumer campaigns, ensuring adherence to brand standards and best practices
- Managed new media marketing budget and oversaw PR agency relationship

Wilson Public Relations

Account Executive Sept 2007 - Sept 2009

- Advanced brand equity and awareness for 14+ lifestyle accounts through innovative brand, marketing & PR, and partnerships strategies

- Grew the agency through advancing existing accounts while simultaneously researching, pitching, and landing new engagement opportunities

Education

University of Washington; Seattle, WA & Rome, Italy — BA, 2007

APPENDIX B
Office of the State Treasurer

Request for Proposals - Communications and Marketing Consultants

OFFEROR'S REPRESENTATION REGARDING CONTINGENT FEES

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

REPRESENTATION REGARDING GRATUITIES

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

CERTIFICATION OF INDEPENDENT PRICE DETERMINATION

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

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

Company Name Thesis LLC

Signed 

Print Name Matt Monnin

Title Production Director

Date 11 / 3 / 2025
MM DD YY

APPENDIX C
Release of Proposal as Public Record

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

CHOOSE ONE:

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

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

Signed 

Print Name Matt Monnin

Title Production Director

Date 11 / 3 / 2025
MM DD YY

APPENDIX D
Acknowledgement of Amendments

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

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

10/15/2025: RFx 3120003221 Amendment #1

10/20/2025 RFx 3120003221 Amendment #2

Thesis LLC

Company Name:

Matt Monnin

Printed Name of Representative:



11/3/2025

Signature / Date

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

