

**Request for Proposals
Communications and Marketing Consultants
RFP# 3120003221**

**Amendment #2
Questions and Answers**

Question#	Section#	Page#	Question (as submitted)	OST Response
1	N/A	N/A	Is there a budget or budget range for this RFP?	Over the last five years, we have spent approximately \$685,000 for all communications and marketing. We hope to stay within this range.
2	N/A	N/A	Is there an anticipated or recommended budget range that OST would like respondents to consider?	See previous response to Question #1.
3	N/A	N/A	Will OST give preference to Mississippi-based agencies or those with an in-state presence?	Preference won't be given to in-state firms; however, any company selected must be a registered business entity with the Mississippi Office of the Secretary of State.
4	4.3.G	17	Is the intent to award a single contract, or would OST consider awarding portions of the scope to multiple vendors?	The RFP is open to awarding multiple contracts.
5	N/A	N/A	Are there specific KPIs (e.g., awareness lift, lead generation, claims processed for Unclaimed Property, CPSM/MACS enrollments, media reach/engagement) that OST wants tracked and reported?	We have internal systems that track claims processed and contract enrollments. No other KPIs are needed.

6	N/A	N/A	Should respondents assume the contractor will manage all media planning/buying, or does OST have existing media relationships/contracts we should plan around?	The current contract, which expires on December 2, 2025, is the only communications and marketing contract we have. However, we have working relationships with local media outlets, and we reserve the right to maintain those relationships.
7	N/A	N/A	We did not see a pre-proposal conference/meeting referenced. Could you please confirm whether one is scheduled?	A pre-proposal meeting is not scheduled.
8	N/A	N/A	I was hoping to understand which other local or regional government municipalities that the Office of State Treasurer for MS deems as a peer/competitor? This will give us an idea on how we approach our research.	Our peer set might be the agencies of other statewide elected officials and any other state agency that has public outreach. However, since each of our state agencies have different programs and responsibilities, our marketing and communications needs vary.
	N/A	N/A	What is the measurable OST Communications and Marketing goal?	<ul style="list-style-type: none"> Unclaimed Property: Understanding of UP, that UP is not a scam, and number of claims initiated, and number of claims paid. College and Career Savings: Understanding of both state-sponsored 529 plans – MACS and MPACT, MPACT Contract Enrollments, MACS Accounts Opened and Funded.
10	N/A	N/A	How will success be measured one year after the engagement begins for College Savings Programs (MPACT and MACS) and Unclaimed Property?	<ul style="list-style-type: none"> College Savings Contract Enrollments Unclaimed Property Claims Paid

11	N/A	N/A	What are the expected KPIs and conversions for each program?	See previous response to Question #5.
12	N/A	N/A	Do written marketing and media plans exist now for (1) College Savings Programs (MPACT and MACS) and (2) Unclaimed Property?	No written marketing/media plans currently exist.
13	N/A	N/A	Will any other marketing plans be available for review and use as a foundation?	No, we want original thought and concepts brought to the table for College and Career Savings as well as Unclaimed Property.
14	N/A	N/A	Are marketing materials design-only, or should printing be included in our estimates?	Printing should be included in your estimates.
15	N/A	N/A	If printing is needed, what quantities are expected for each piece?	This varies depending on the collateral, but we usually print 1,000 of an item at a time. College and Career Savings has the most collateral; Unclaimed Property currently only has a brochure.
16	N/A	N/A	Could you describe the primary and secondary target audiences for College Savings Programs (MPACT and MACS) and for Unclaimed Property?	<ul style="list-style-type: none"> • Unclaimed Property: Adults 18+ in Mississippi. • College and Career Savings: Young Parents and Grandparents
17	N/A	N/A	What age group has been most receptive to each program?	<ul style="list-style-type: none"> • Unclaimed Property: All Adult Mississippians • College and Career Savings: Young Parents/Grandparents

18	N/A	N/A	What media channels have been most successful in achieving OST's goals?	<ul style="list-style-type: none"> • Local Officials • Facebook • Talk Radio • General Interest TV Interviews • Mississippi Centric Channels
19	N/A	N/A	Are there any media channels OST prefers to avoid?	<ul style="list-style-type: none"> • TikTok
20	N/A	N/A	What is the expectation for event marketing?	<ul style="list-style-type: none"> • Print Materials: Yard Signs, Other materials to support the event if needed (event collateral) • Social Media Marketing • Media Spots
21	N/A	N/A	What level of agency support is most needed to assist OST staff for events?	<ul style="list-style-type: none"> • OST Staff will handle event staffing. No in person staffing needed from anyone other than OST staff.
22	N/A	N/A	Is there a PR plan in place now?	No
23	N/A	N/A	Does OST most need PR support with identifying story opportunities, writing and distributing releases, pitching stories, or other PR activities?	<ul style="list-style-type: none"> • Our biggest goal is always to increase awareness of Unclaimed Property and College and Career Savings Mississippi. We have done a lot of work to bring awareness of our programs to Mississippians but feel we still have a long way to go. The biggest hurdle for Unclaimed Property is people thinking it is a scam. • We are looking for support writing draft press releases, pitching stories, and bringing awareness to our programs.

24	2.1 – 2.1.4 4.2	7-9 15-16	<p>I'm working through RFP# - 3120003221, and it is requesting a proposal for management and a separate proposal for technical.</p> <p>I've reviewed the RFP and found some sections of what should be included in our response, but I did not see a breakdown of what should specifically be included in the management and what should be in the technical.</p> <p>Apologies if I am overlooking it, but is there a section or separate document showing exactly what should go in each proposal?</p>	The Scope of Services and Information Required on Pages 7-9 as well as the Evaluation Criteria on pages 15-16 detail what should be included in your proposal.
25	1.6	5	Could we request an extension to the submission deadline considering the upcoming holiday?	The submission deadline has been extended to November 3, 2025
26	N/A	N/A	Do you have an incumbent and would they be participating in this RFP?	Yes, we currently have a communications and marketing contract / incumbent, and they will be submitting a proposal.
27	N/A	N/A	Could you let us know if you have a local preference or are you open to a Canadian agency that has done similar work with clients across the United States, with some currently being the States of California, Colorado and Wyoming?	See previous response to Question #3.
28	N/A	N/A	Could you let us know what the budget is for this work?	See previous response to Question #1.
29	2.1 – 2.1.4 4.2	7-9 15-16	Will the new amended RFP provide guidance on how your folks would like the proposals written?	See previous response to Question #24.

30	N/A	N/A	I came across your communications RFP and was wondering if you are open to bids from Canada.	See previous response to Question #3.
31	1.5	5	Is it okay if we wait until we review answers to questions, on October 20th, before deciding whether we would like to keep our previously submitted proposal, or submit a new one?	It is certainly fine to wait until October 20 to decide if you want to resubmit. The new deadline is November 3 rd .
32	Appendix B Appendix C Appendix D	26 27 28	Also, if we would like to keep our submitted proposal the same, would we need to fill out and submit the newly added Appendix C and Appendix D documents separately?	If you decide not to resubmit a proposal, please complete a new Appendix B (it has been modified), as well as Appendix C and D.
33	N/A	N/A	Will OST provide an approximate annual marketing budget or allocation per program to help respondents plan appropriate levels of strategy, creative development, and media activity?	See previous response to Question #1.
34	N/A	N/A	Does OST anticipate providing a separate media budget outside the professional services contract for paid placements, or should respondents include projected media spend within their proposed fixed-price cost structure?	In some instances where our local media relationships may come into play, we would anticipate using a separate media budget, but otherwise please include budgetary estimates in your proposal.
35	N/A	N/A	Are there any current sports marketing partnerships OST would like maintained or re-evaluated, or should respondents propose new collegiate and community partnerships from scratch?	We have several current sports marketing contracts pertaining to the college savings programs that are negotiated outside this contract. However, this does not preclude the vendor from proposing additional opportunities.
36	N/A	N/A	Is there an incumbent communications contractor, and if so, should respondents anticipate transition support during the contract start-up period?	There is a current expiring contract. So, yes, there may be action required to ensure smooth transition and continuity.

37	N/A	N/A	Can OST clarify the expected scope of employer marketing? For example, does OST envision statewide employer partnerships coordinated by the contractor, or is the intent primarily to provide creative toolkits and messaging for OST staff to distribute?	Primarily the latter.
38	N/A	N/A	Should respondents assume media-relations management (pitching, press lists, monitoring) or only message development and press-release drafting under this item?	Pitching and monitoring may be needed. However, in those cases where Treasury personnel may have existing relationships, these outreaches will be made in close coordination with Treasury staff.

Receipt of Amendment #2 Acknowledged:

Company: _____

By: _____

Printed Name: _____

Title: _____