



Petition for Relief from Competitive Sealed Bidding Requirements

Miss. Code Ann. § 31-7-403 and § 31-7-413

PPRB OPSCR Rules and Regulations Sections 3-201, 3-203.01(g)(2), and 7-103

Agency: Office of the State Treasurer

Requested Date for PPRB Approval: 06/04/2025

Procurement Method Requested: Request for Proposals (RFP)

Intended Initial Contract Term: three (3) years

Intended Renewal Terms Available: two (2) one-year optional renewals

Number of Contracts Intended to be Awarded: no more than two (2)

The Agency intends to solicit the following service(s) and/or scope of work:

The Office of the State Treasury (OST) is soliciting written proposals from qualified vendors for the purpose of serving as communications and marketing consultants for OST, including the Executive Office, the Mississippi Prepaid Affordable College Tuition Program (MPACT), the Mississippi Affordable College Savings Program (MACS), Unclaimed Property, and all other operations of the Office. The consultants shall be responsible for public affairs, media relations, digital and social media communications and advertising, direct mail marketing, and telephone marketing, that exceed the capabilities of agency staff.

As explained below, use of an Invitation for Bids is: ☐ **not practicable**
☐ **not advantageous**
☒ **both**

The responsibilities of the Office of the State Treasurer include managing the State's financial resources, overseeing the wise investment of funds, and searching for new opportunities to enhance the State's economy. Specific program responsibilities include the issuance of state debt; the timely payment of principal and interest on State bonds and note obligations; and receiving, disbursing, and investing state funds. The Office also manages programs that affect Mississippians on a personal level, including the return of unclaimed property to its rightful owners and financial programs that help Mississippi families save for college education and careers.

The program objectives of the Office of the State Treasurer are accomplished, in part, by effectively advertising and marketing the various benefits of said programs. Due to the specialized nature of the work performed by the College Savings Mississippi Division, the Unclaimed Property Division, and other departments, utilizing the RFP process instead of an IFB is vital so that we may provide continuity in the message of each program's target audience.

The Agency is concerned that utilizing the IFB process could result in a vendor being selected that has limited knowledge of State Treasury programs and limited resources and technical skill to provide the type of strategic communications and marketing plan needed. Due to the nature of the contract, there are many factors that should be considered in addition to cost, with the pertinent being technical skill, appropriate organizational structure to handle the demands of marketing our various programs, and creativity and design experience.

The Contractor shall be expected to assist agency staff in the development and implementation of annual and long-term marketing strategies and the plans for executing those strategies. The Contractor shall be experienced in radio, television, and social media advertising, including creation and production of commercials, internet marketing, website design and maintenance, and marketing to civic organizations and at community events.

The unique nature of programs at the Office of the State Treasurer, including the College Savings Programs and Unclaimed Property Initiative, requires a level of technical marketing expertise that may not be found by simply choosing the lowest bidder. As such, it is necessary to emphasize the technical and management qualifications over cost. Because cost is often billed on an hourly rate, companies with limited marketing experience and/or limited staff dedicated to the project may ultimately cost the state more money because deliverables may need reworking. Companies with a small staff or a staff with limited expertise may spend more time achieving the same goals as a company with the necessary staff and experience to handle a program of this scope.

An internal review committee will conduct interviews with vendors who submit a proposal through the RFP process prior to selection. The use of an RFP would be more beneficial to the Agency because cost is not the only contributing factor when selecting the best communications and marketing firm. What is more important in the selection process, will be landing on a Vendor with the appropriate skill set, vision, and organizational structure to effectively market agency programs statewide. The best way to judge a vendor's capability is to view proposals to give the Agency an idea of the vision and execution a vendor will bring to the table.

The Agency intends to use the following Evaluation Factors:

Cost - 35%

Technical - 30%

- 15% - Proven history and experience in dealing with specialized projects
- 10% - Knowledge of emerging marketing strategies to better communicate with constituents
- 5% - Staff dedicated to creative with at least 5 years of experience in graphic design

Management - 25%

Interview - 10%

Is the Agency requesting to score Cost openly? Yes ☐ No ☒

If yes, please provide an explanation:

Are these services currently being provided to the Agency? Yes ☒ No ☐

If yes, who is currently providing the services?

Amplify, Inc.

Agency Representative for PPRB Meeting: Theresa Abadie, Comptroller

The Agency Representative will attend: In Person ☒ Remote ☐

*The option to attend remotely is not available to Agencies located in Hinds, Rankin, or Madison counties.

By signing below, I certify that all information provided herein is true, correct, and complete to the best of my knowledge.

Theresa Abadie

05/07/2025

Chief Procurement Officer

Date

Chief Procurement Officer Name: Theresa Abadie, Comptroller

Telephone Number: 601-359-2523 Email Address: theresa.abadie@treasury.ms.gov

The PPRB may modify or revoke its approval of the Petition for Relief at any time. The Board's approval must be "reviewed for current applicability from time to time." Miss. Code Ann. §31-7-403(4). Therefore, a solicitation cannot be issued from this Petition for Relief if the Board's approval occurred more than one year prior to the date the solicitation will be issued.