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To: All Potential Bidders
From: Tracy Swalwell, Issuing Officer
Re: RFP 21216-12 - IID Marketing, Advertising, and Event Services
Date: November 18, 2021

SECOND ADDENDUM

This Addendum is being issued pursuant to Section 2.6 of the Iowa Insurance Division Request for Proposals for Marketing, Advertising, and Event Services, RFP 21216-12. The Division is issuing responses to questions, request for clarifications, or suggestions as set forth below. The Division's written responses are considered part of the RFP and incorporated into the RFP as this Second Addendum. The Division has grouped similar questions together.

Vendors/RFP

1. Who is the incumbent agency if there is one, how satisfied were you with their results? / Who won the previous bid? Could we see the previous cost proposal? / Can IID share previous examples of similarly aligned projects, or references to programs you are looking to model this after?

- There is no incumbent agency, previous bid, or previous cost proposal.
- The Division does not have any similarly aligned projects or programs that this was modeled after.
- The Division's goal is to have a least one vendor on contract to perform certain marketing and advertising service as needed by the Division as well as contract with a vendor for certain specified services. The Division is seeking qualified vendors with the specified attributes in order to more quickly launch marketing campaigns as needed.
- See RFP sections 3.3 and 4.2.

2. Is there a preference for in-state and/or local bidders?

- See Iowa Code section 8A.311
<https://www.legis.iowa.gov/docs/code/8a.311.pdf>
"1. a. . . . Preference shall be given to purchasing Iowa products and purchases from Iowa-based businesses if the Iowa-based business bids submitted are comparable in price to bids submitted by out-of-state businesses and otherwise meet the required specifications. If the laws of another state mandate a percentage preference for businesses or products from that state and the effect of the preference is that bids of Iowa businesses or products that are otherwise low and responsive are not selected in the other state, the same percentage preference shall be applied to Iowa businesses and products when businesses or products from that other state are bid to supply Iowa requirements."
- See Iowa Administrative Code rule 11-117.6
<https://www.legis.iowa.gov/docs/iac/rule/11.117.6.pdf>

3. How many vendors will be awarded?

- See RFP section 1.3
- The Division has not determined how many vendors will be awarded contracts.

4. Is there any requirement for the vendor to be on site? / Do vendors need to come to Des Moines/Iowa for meetings?

- Some in-person meetings and services will be required in order to perform the services sought.
- Vendor must pay for its travel costs to Des Moines or include travel costs in the costs proposal as part of the cost of services.

Pricing/Budget/Cost Proposal

5. Will the award be based on the lowest cost bidder?

- See RFP section 2.24 and section 5 – Evaluation and Selection.
- Additional information regarding the evaluation of the technical and costs proposals will be provided by separate addendum listing the breakdown of points to be assigned prior to the closing of the RFP.

6. Is it possible to share actual budget for the past few years?

- The Division does not have an actual budget to share. As stated in the “Objectives,” the Division is seeking to coordinate messages for programs that may already have their own marketing plan.
- See answer to question 1.

7. Do you have an approximate budget for this RFP? If so, is there a breakdown of where the budget will be allocated? For example, what percent will go to each of the investor education programs outlined on page 6 of the RFP? / What are some example budgets of past marketing efforts and campaigns?

- See section 1.3. The Division does not have further information at this time and the actual budget will depend on the needs of the Division in upcoming years.
- See answers to questions 1 and 6.

Programs

8. Can you provide any existing research/information on current consumer perception of the Iowa Insurance Division or its programs?

- The Division has no information at this time in response to this question.

9. With the investor education programs, does the Division have any prioritization of these? Or past performance data to share—registrations, attendance at events, etc.?

- The Division does not have any prioritization of the investor education programs currently.
- See “Objectives” in section 1.4.

10. Is there specific dates/time of year that should be dedicated to the specific investor education programs on page 6?

- There are various days/months throughout the year that may be beneficial to promote the Division’s programs such as National Financial Awareness day on August 14 or Financial Literacy Month during the month of April.

- The Division would expect a vendor selected to do investor education program marketing to have some familiarity or at least be able to obtain relevant information in order to best promote the Division's programs.

Current Marketing Information

11. Does the IID have someone to manage social media? Or is this something that is expected from the RFP? Shared responsibility with the winning bid?

- The Division's Communication Director manages social media.
- Depending on the campaign, the vendor will likely be managing the social media campaigns as well.

12. Can you describe any current internal team resources for areas outlined in this RFP – including marketing, communications, public relations and social media?

- The Division has no information to provide in response to this question.

13. Are there other marketing initiatives which have already taken place? And, if so, would they be ongoing while this campaign is running?

- Marketing initiatives for some investor education programs are ongoing.
- More information on these programs is available on the Division's website at <https://iid.iowa.gov/investor-education-financial-literacy>.

14. What current digital assets does the IID currently have and who are the vendors? Will the current assets be used in the new campaign moving forward? /

- The Division has current digital assets for the programs that have marketing included as part of those programs.
- These assets may be used in campaigns as needed to coordinate messages.

15. Does IID have existing style guides or brand standards to adhere to?

- The Division does not have an overall style guide or brand standard to be used across all advertising.

16. What social media channels are most heavily used by your members?

- The Division receives the greatest interaction with Facebook, followed by Twitter and LinkedIn which are utilized as needed.

17. Does IID currently have pathways of outreach to target audiences? If so, what are the primary communication channels? / What social media channels does IID typically use to connect with audiences?

- The Division currently uses direct email, direct mail, Facebook, Twitter, LinkedIn, YouTube, and websites.

18. What social presence would be preferred for this campaign – brand awareness only or additional subsets?

- The Division seeks brand awareness with its programming but also seeks to encourage engagement with the programs and see measurable results in behavior and knowledge.

- 19. With earned media, are there specific niche audiences that are most important to reach? If yes, can you elaborate? Share any key demographics or psychographics? /**
- See “Targeted Audience” in section 1.4.
- 20. Which Iowan populations are considered “underserved” in this capacity, that IID would like to prioritize as a target audience? / Does IID have knowledge of the most effective channels/methods to reach the specified “underserved” populations? / Are there similar state-level campaigns happening within the U.S. that may be referenced?**
- The Division considers Iowans not currently reached by the IID programming, persons in need of financial literacy, and persons without easy access to financial literacy to be underserved.
 - The Division will supplement the research/knowledge of the vendor for the most effective channels/methods but will rely on the vendor to supply research and recommendations.
 - The Division does not have any examples to provide.
- 21. Any geographic regions of particular importance?**
- The Division’s programming should be marketed to Iowa residents.
 - Future campaigns with a targeted message may focus on specific geographic areas within Iowa.
- 22. Key influencers? Individuals or organizations?**
- The Division has no information in response to this question.
- 23. How has the market changed recently? Been affected by the COVID-19 pandemic or other economic factors? Created new opportunities?**
- The Division will expect any selected vendor to provide insights regarding how the market may have changed in order to create an effective marketing campaign.

Services

- 24. How many hours a week or how often would IID want their partner to meet? Would this be something done in person or via Zoom?**
- Meetings will be dependent upon any current campaign programs or services being performed.
 - Meetings may be in person or via video or teleconference. See answer to question 4.
- 25. How many :60 and :30 videos do you anticipate needing? Is that in each year of the contract, or one time? Will longer videos be bid as well? Should video production travel time be included? What locations would be filmed?**
- The Division does not have an estimate of how many videos may be needed.
 - Vendors should provide the pricing to create and produce a single :60 and :30 video for committee evaluation.
 - Longer videos may be included for specific campaigns but are not being specifically bid as part of this RFP. Vendors may include information in their proposal regarding longer videos if the vendor thinks this will be helpful for the committee.
 - Vendors may assume the video location will be the Division’s office or generally in Des Moines, Iowa. Vendors should include video production travel time in their proposal.

- 26. What style of videos should be priced for the 30/60 second video services (live action, animation, motion graphic, etc.)?**
- Vendors should price for live action but may also include animation, motion graphic, etc. if the vendor has experience with those styles of videos.
- 27. In regards to shooting video, conducting interviews, and communicating with stakeholders, is there an expectation of traveling to target communities in order to conduct outreach?**
- Some travel will likely be necessary for certain campaigns.
 - See answer to question 25.
- 28. Do you know what topics the videos would cover? Instructional or promotional in nature? Do you see them using professional VoiceOver and/or actors?**
- The videos may be instructional or promotional.
 - The Division anticipates videos will include Division or other staff as well as professional VoiceOver and/or actors. Vendors should provide pricing for both options.
- 29. How many of the three pamphlets would you need to have printed? / Does IID have a determined volume of deliverables they are aiming for? (e.g. videos, flyers, infographics, web assets, etc.)**
- The Division does not currently have an estimate of how many pamphlets would need to be printed. Cost proposals need not include the cost to print the pamphlets but vendors may include this information if the vendor thinks it will be helpful to the committee.
 - The Division has not determined the volume of deliverables at this time.
- 30. In regards to event management services, how many events does IID have in mind for program promotion? / What volume of audience is IID expecting at educational events?**
- The Division anticipates having 1-5 events each year including such events as town hall meetings, community conversations, conferences, webinars, and trainings.
 - Audience volume may range from 50 – 300 individuals depending on type of event.
- 31. Are there written standards of practice/ethics for Iowa consultants that a response should reference?**
- No
- 32. What outputs does IID anticipate needing 508-compliance services for? Would IID like these services included in the cost proposal?**
- The Division may have future projects would need 508-compliance services for – an example may be the creation of a microsite. These services do not need to be included in the cost proposal.

Measuring Success

- 33. What have you done in the past that has brought success to the IID?**
- The IID organized a public awareness campaign related to the Iowa Fraud Fighters.
 - Educated students and other Iowans about financial literacy.
 - These efforts were successful as the Division was able to measure the effectiveness of the efforts and an increase in knowledge and positive behavior changes were seen.

34. What does success for the IID look like after year 1?

- Success would be an increase in reach to Iowa residents regarding the Division's programs resulting in increased financial literacy, program engagement, and reporting of potential fraud to the IID.

35. How will success be measured in regards to behavioral changes in Iowans?

- The Division will seek potential success measurements from the selected vendor.
- For example, success may be measured via courses taken online, comments to the IID regarding changes they have made, survey results, an increase in Iowans opening savings accounts, starting emergency funds, etc. Positive financial advancements would be considered a behavioral change,

Contracting

36. Will the marketing for the Consumer/Investor Education Programs be one year, or every year for the three years of the contract term?

- The Division anticipates the marketing message and the marketing plan listed in section 3.3.2(1) to be for one year but may be continued depending on success.

37. The RFP states the contract will begin Feb/March 2022. When will it end? End of calendar year?

- Contracts are subject to negotiation with the selected vendor(s).
- The Division may award contracts with an initial term of one, two, or three years.
- The end of a specified term may be the calendar year or contract year.

Other

38. Section 3.1 states to name files using RFP number 21216-03. Is this correct?

- 21216-03 was a typo and is incorrect. Please label files using 21216-12.

Signed copy must be submitted with proposal pursuant to RFP section 3.2.6.

Respondent Name: _____

Signer Name: _____ Signature: _____