

**Amendment to the Solicitation: Bidders shall be required to submit a Certified Public Accountant’s statement of current assets, liabilities and equity or a recent audit of the firm’s assets. The Certified Public Account or Audit must have been done within the last 12 months. Financial information shall be in a separate envelope and marked “Confidential”. This information will not be subject to release by Open Records request.**

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**Question:** In section 4.0, the document states that “Items noted as ‘vendor’ responsibilities are post award requirements and where noted, bidders should provide ‘metrics’ for previous accomplishments of the requirement *that can be verified by customers served* within the last five years. For any responses that bidders provide metrics, please also provide client name. Bidders shall provide the client contact information within the references section.” Metrics will be assumed to be valid for evaluation purposes but will need to be verified prior to award. Metrics will be assumed to be valid for evaluation purposes but will need to be verified prior to award. Metrics that cannot be verified will be discounted appropriately and may affect award considerations. Metrics will typically be numeric in nature such as “1% price deviation, 100% customer satisfaction, 60% market saturation, 98% on-time delivery, etc. *The information above (section 4.0) is an informational section, no response required. Responses are required for each component beginning at 4.1.1.*”

Is this requirement exclusive to sections 4.1.1 – 4.1.8? Or are there other “responsibilities” in sections 5.0-15.0 that we should provide metrics for?

**Answer: Outside of Section 4.0, you need only provide metrics if specifically required.**

**Question:** In section 4.1.1, the document states that we should provide one example along with organizational years of experience for each requirement below

Are we correct in assuming this is for items 4.1.1.1 – 4.1.1.7.?

**Answer:** You are correct in assuming that the instructions on 4.1.1 only apply to the subset numbered items 1 – 7.

**Question:** Does this mean years that the agency has been doing each responsibility as a business unit? Or are we to add up total years that our employees have doing each type of work even if/when they were employed elsewhere?

**Answer:** Years means the number of years the submitting organization or that of its subcontractors have been doing each type of work stated in the subset number 1 – 7 below 4.1.1.

**Question:** In section 4.1.6, the document asks that we provide examples of each type of purchasing activity.

Are you asking for media invoices as proof of each type of activity?

**Answer:** Response could include media invoices for each type of activity as proof of experience and relationships. Other documents could also be offered as examples of these types of activities.

**Question:** In section 9.2.1, the document states that “One (1) letter is required from television advertiser receiving services from the Bidder of more than \$750,000\* per year”

- a. To clarify: Are you asking for a reference from a client that spends more than \$750,000 with the agency?
- b. Or are you asking for a reference from a media property that receives more than \$750,000 in client spend from the agency?

**Answer:** Either type of reference stipulated above would be considered responsive. The bidder would need to be clear in the description of the type of reference being submitted.

**Question:** In section 12.1, the document states that “The bidder’s response shall demonstrate their ability to meet each individual requirement listed within sections 3.0 through 10.0 of this request for proposal. All information received from Bidder is to be of sufficient clarity and definition in order for the evaluation committee to make reasonable determination of capabilities and capacities of each Bidder’s ability to satisfactorily perform TSET Comprehensive Media Services as defined in this solicitation.”

We have interpreted the requirements of our submission to actually include sections 4.0 – 11.0, 13.0-13.3, 14.0 – 14.4, and 15.0-15.4” Is this correct?

**Answer: CORRECTION** in 12.1, first sentence should read: The bidder’s response shall demonstrate their ability to meet each individual requirement listed within sections 4.0 through 15.4 of this request for proposal.

**Question:** If 3.0 – 3.3.1 is included in this, should we just acknowledge that we have seen and agree to all points in this section?

**Answer:** Section 3.0 – 3.3.1 does not need a response.

**Question:** In section 14.0, "Appendix A" states that "Project Responsibility needs to total 100%."

To clarify: Does this mean that we are to guess the percentage of time that will be billed to each function and that total for the year shall equal 100%?

**Answer:** Section 14.1 is to establish rates for years 1 through 6 and the approximate percentage of time that will be spent by each functional area. All groups that would have any billable activities for new ad creation and support of all aspects of comprehensive media planning and execution of those plans should be represented and should account for 100% of activity necessary to complete the entire process each year.

**Question:** If yes, is this for the project budget listed under 14.4?

**Answer:** Section 14.4 is a separate budget submission and is intended to establish how a \$3 million budget would be allocated between hard costs (advertising) and soft costs (administrative or billable costs).

**Question:** Or is this for the total budget each year, for years 1-3 and years 4-6?

**Answer:** Section 4.0 notes: The awarded contract will be a reimbursement-based contract. Health communication fiscal year budgets have ranged from \$9 million to \$13.5 million over the last few fiscal years.

**Question:** And does this mean that we can only bill hours that fall into the provided structure if the contract is awarded?

**Answer:** We understand various functional activities will fluctuate dependent on the type of ad that is being created. What we are establishing with this component is the labor rate for each functional area for the next 6 years and the average amount of time that will be spent by each group on a typical project.

**Question:** Or are you trying to determine how many employees will have 100% of their time dedicated to you? In which case this number would exceed 100%? As several will spend 100% of their time.

**Answer:** This is not the intent of this section.

**Question:** In section 14.3, the document states that the bidder is to provide a "sample timeline including comprehensive process steps for developing a \$3 million statewide educational campaign..." and in section 14.4 it states that "the bidder will provide a sample budget for the above stated educational campaign..."

- a. Are we to assume this is for a 12-month initiative?
- b. And do you have a target launch date that we should assume?

**Answer:** The timeline should be for a 12 month process with the target launch date set at the time your organization would be ready to launch within that 12 month timeframe.

**Question:** The RFP asks for an hourly rate submission for years one through six. Our firm does not operate on an hourly model. Our turnkey capabilities allow us to dedicate significant resources towards executing against brand strategies and delivering exceptional value from ideation to execution. Our pricing is based on fair market value for our services. Our value is not based on the time it takes our people and technology to complete projects, but rather the value they deliver for our clients.

Given the stated needs for pricing and rates in the RFP, we want to confirm this will not be a disqualifier or greatly hurt our chances at winning the contract.

**Answer:** See sections 14.0 Pricing and 15.0 Compensation. Omitted or skipped information for this RFP can be considered 'non-responsive' and the bidder can be disqualified.

**Questions:**

- Can we receive copies of current marketing plans and strategy documents?
- Can we also receive copies of all prior years' media plans (and marketing plans) so we can better understand how the campaign has evolved over time?
- Similarly, can we receive copies of social media content distribution for as many years as each program has used social media?
- Do they use outside sources to analyze social media? If so, can we see those reports? If not, how are they measured?
- Can we receive copies of key creative materials produced by year?
- Can we have access to Google Analytics for all campaigns?
- How have they measured the campaigns' success? Can we see copies of the study design of those studies and their results?
- Have they developed and produced materials specifically for segmented targets such as Native Americans or African Americans? How have they measured the success?
- What programs, if any, have been targeted specifically to children and to parents of children? Again, we would like to success measures.
- May we receive copies of any documents or research they have used to help inform their strategies each year?

**Answer:** The Request for Proposal process involves questions being asked and answered, and it does not involve the production of documents. Documents may, however, be requested through an Open Records Act request for documents under Title 51, Oklahoma States Sections 24A.1-24A.24. An Open Records Act request for documents is a process that is separate from the RFP process and it does not delay or alter the RFP deadlines. Please confirm in writing whether you are making an Open Records Act request for production of documents.

**Question:** Is the chosen vendor required to be an Oklahoma company or will companies based outside Oklahoma be considered?

**Answer:** All submissions will be considered and bidders need not be an Oklahoma company to be awarded. Bidders should note:

**10.0 Firm Location Requirements:** Preference will be given to firms with a presence (actual presence or existing contractual partnerships) in Oklahoma with a representative or office located in Oklahoma City. The awarded vendor will be required to maintain an office within the State of Oklahoma consisting of a minimum of one full-time individual that will serve as an Account Executive who can develop media and public relationships with in-state outlets, attend planning meetings, work directly on-site with TSET staff, attend and make board presentations when necessary, etc. If the awarded vendor does not currently have an office established in the State of Oklahoma, awarded vendor shall be required to establish an office no later than three (3) months after the date of award.

**17.1 Travel and Related Expenses:** a) In accordance with Title 74, Section 85.40 all vendor travel expenses, to be incurred by the vendor, that are part of a service contract shall be included in the total price proposal. The vendor shall pay for all travel-related expenses incurred by their staff in meetings with or on behalf of TSET at any location within the state of Oklahoma. It is anticipated that there will be routine meetings/presentations, most of which will take place in Oklahoma City. The vendor will not be reimbursed for such travel.

**Question:** What is the estimated amount of the annual paid media budget?

**Answer:** This varies by year by funds made available annually through the TSET Board of Directors. The total Health Communication budget for FY2018 is estimated at \$9.1 million with overall brand budgets (inclusive of hard costs and soft costs) ranging from approximately \$2.4 million to \$3 million.

In FY2017 the percent of each brand's budget dedicated to media was: Tobacco Stops with Me 72%; Oklahoma Tobacco Helpline 75% & Oklahoma Tobacco Helpline SoonerQuit 75%.; and Shape Your Future 70%.

As a reminder, 15.2 Rates should include all administration costs; 15.4 All fees to the awarded firm will be paid by reimbursement after expenses have been paid and documentation has been submitted to and approved by TSET; 17.26.5 Hard costs may include but not be limited to television, radio, outdoor, print, electronic, social media, collateral items, travel, and outside vendor services as approved by Contract Monitor. 17.27.6 The awarded vendor further assures that all billings will be based on actual costs incurred and is in accordance to the Hourly Rate Schedule as provided during the RFP process.

18.4.2 8. Materials costs are to be submitted as a pass-through at the vendor's cost with no markup allowed.

**Question:** Are you interested in working with multiple agencies for specific pieces or are you looking for a single agency to handle all pieces?

**Answer:** We are looking for a single point of contact which will have fiduciary responsibility for the entire contract as well as management of all assigned projects.

See Section 1.0 of the RFP: The scope of services being sought requires the awarded vendor to provide all services customarily performed by a full-service marketing entity to successfully develop and conduct various strategic marketing projects and campaigns on a variety of public health topics, issues, or needs throughout the State of Oklahoma including tobacco prevention and cessation, nutrition, physical activity and healthy lifestyles.

**Question:** Adding a potentially \$9-13.5m client to anyone's roster would be a huge undertaking for anyone but the incumbent agency. It seems to reason a winning agency would need to increase their staff or utilize subcontractors to successfully complete the scale of work and meet your expectations. Will you be reviewing or considering an agency's \*current\* size of staff when considering your partner? In other words, should an agency who doesn't have the quantity of staff \*already on board\* even apply?

**Answer:** See section 6.0 specifically section 6.1 Create and submit a staffing table that lists all key personnel that will be associated with the range of marketing services...indicate any contracted individual's roles...and finally any vacancies that will need to be filled should a contract be secured by your organization and section 6.5. If any of the proposed Key Personnel or the Senior Account Executive(s) are not currently employed with bidder or a subcontractor, a letter of intent to accept employment shall be included in the response.

**Question:** Will you be releasing the list of bidders who submitted their intent to bid? If so, before or after the proposals are due?

**Answer:** A list of bidders will not be provided but can be requested after award through the Open Records Act.

**Question:** When a vendor provides metrics to support the quality of their work, are you concerned about the scale of the work (relevant client size to TSET) or just the quality of the results?

**Answer:** See References Section 8.0 specifically 8.1 provide evidence of the qualifications and credentials of the entity in terms of proven successful experience through similar projects of like size and scope, including a list and description of relevant government and commercial projects successfully completed in the past five years.

Throughout Section 4.0 Scope of Work, examples should relate to the specific information requested. The scope of the example project and the metrics will both be considered in the review.

**Question:** How much of your ~ \$9-13.5m budget is production/fees/revenue for the winning agency, versus pass through for media (which, I believe, the agency cannot mark up or charge commission for)? Even a percentage or ballpark would be helpful in understanding the balance of production to placement relative to staff requirements overall and departmentally.

**Answer:** Percent of budget dedicated to media by brand in FY2017 was: Tobacco Stops with Me 72%; Oklahoma Tobacco Helpline 75%; Shape Your Future 70% and Oklahoma Tobacco Helpline SoonerQuit 75%. As a reminder, 15.2 Rates should include all administration costs; 15.4 All fees to the awarded firm will be paid by reimbursement after expenses have been paid and documentation has been submitted to and approved by TSET; 17.26.5 Hard costs may include but not be limited to television, radio, outdoor, print, electronic, social media, collateral items, travel, and outside vendor services as approved by Contract Monitor. 17.27.6 The awarded vendor further assures that all billings will be based on actual costs incurred and is in accordance to the Hourly Rate Schedule as provided during the RFP process. 18.4.2 8. Materials costs are to be submitted as a pass-through at the vendor's cost with no markup allowed.

**Question:** 4.1.2: "The Vendor is responsible for conducting primary and secondary research". Can the Vendor oversee and design these efforts, but outsource the distribution and collection of these items? Or are you expecting the Vendor to handle this 100% first-party?

**Answer:** 5.0 Bidder's Experience and Qualifications: TSET is particularly interested in a vendor that has substantial experience developing, implementing and managing media contracted services. In totality, the Bidder's experience combined with that of any subcontractors shall demonstrate the capability to successfully meet the requirements of this RFP.

**Question:** How much of the TSET campaigns we see on TV are created here locally, by your incumbent agency, versus being syndicated/modified/adapted from national/predefined creative?

**Answer:** This can vary by brand and by year. TSET strives to use the most cost effective method to provide campaigns which inform Oklahomans' knowledge, attitudes and support positive health behaviors. In this current year, Tobacco Stops with Me is using adapted creative, the Oklahoma Tobacco Helpline is using adapted and original creative and Shape Your Future is using all original creative.

**Question:** 4.1.5: "Vendor shall develop... cultural and language translations". Can the Vendor oversee these efforts, but outsource the translation or transcription service? Or are you expecting the Vendor to handle this 100% first-party? If we are to provide examples of this, should we distinguish our role if we weren't the actual translators, and if we weren't, is there a point to sharing the examples?

**Answer:** 5.0 Bidder's Experience and Qualifications: TSET is particularly interested in a vendor that has substantial experience developing, implementing and managing media contracted services. In totality, the Bidder's experience combined with that of any subcontractors shall demonstrate the capability to successfully meet the requirements of this RFP.

**Question:** 4.1.6: We assume the Vendor is not eligible to receive markup/commission/pass through on media placement services, like some other state contracts. Is the Vendor allowed to charge an hourly rate for the time spent providing these services, in lieu of the markup?

**Answer:** 18.4.2 Vendor Pricing Terms

1. All services provided by the vendor pursuant to this contract shall be billed to TSET in accordance with the Hourly Rate Submittal submitted during the RFP process.

2. If at any time, the vendor utilizes a subcontractor to fulfill the required services of a Task Order, vendor shall bill TSET the actual rate paid to the subcontractor, but not to exceed the rate allowed by the Hourly Rate Submittal.

9. The vendor must understand that the contract will be a combination of cost reimbursement (hard costs) and fee based (service categories) in accordance with the Price Proposal as submitted by as part of the RFP response.

17.26.7 All services provided by the awarded vendor pursuant to this contract shall be billed to TSET in accordance with the hourly rate submitted during the RFP process. If at any time, the awarded vendor utilizes a subcontractor to fulfill the required services of a Task Order, Awarded Vendor shall bill TSET the actual rate paid to the subcontractor by the Awarded Vendor, but not to exceed the rate allowed by the Hourly Rate Submittal.

**Question:** 4.1.7: This seems like a summary of scope already defined. You ask for examples and demonstrations of competency here, but also in each section prior. Where should we show these skills - since we are required to reply line-by-line to this RFP? In one place, in both? Cross-reference? If someone doesn't see examples in 4.1.7, will we penalized even if the work is already demonstrated elsewhere?

**Answer:** Reply line-by-line and if you feel you have answered sufficiently previously, reference your previous response.

**Question:** 9.2 Letters of Recommendation: You state that a "television advertiser" with a budget of more than \$750,000/year should provide a letter. Does that budget have to be spent on television? Does the client have to do their TV with us to qualify? Do they have to have spent \$750,000 with us \*already\* this year, or simply have a contract with a commitment to it within a 12-month period?

**Answer:** Your organization or subcontractor / potential subcontractor should provide a recommendation from a client through which \$750,000 worth of television advertising is being done in a calendar year through your organization or subcontractor.

**Question:** 9.2: "References that do not meet the spending threshold of \$750,000 can be submitted but will not receive the full possible score." - What is the full score, what is the partial score if the letter doesn't meet the spending threshold, and what is the score if a letter is skipped or omitted altogether?

**Answer:** Omitted or skipped information for this RFP can be considered 'non-responsive' and the bidder can be disqualified. Each response request will be scored on a weighted scale.

**Question:** We understand that the work we do must be completed and approved prior to invoicing and receiving payment from you. Because of the volume of concurrent work expected, that's likely a significant financial burden on the agency partner. Can you provide a simple range or estimate of the amount of money paid out to your current agency more than 90 days after the work had begun? More than 60? In other words: How much, typically, does an agency have to "wait for", and for how long?

**Answer:** Once an invoice is received and reviewed from a vendor, payment from TSET is no more than 45 days and typically within 30 days.

**Question:** If the agency is placing media on your behalf, is the agency fronting those media costs as well and billing you for them? How much media billing should the agency be ready to cover in advance for you, if that's the arrangement?

**Answer:** Monthly invoicing to TSET can range from \$750,000 to \$1.5 million typically and in some cases up to \$2 million for a given month.

**Question:** Is there an agency who has recently or currently been your partner? If so, who? Are they participating in this bid? Did they successfully complete all renewal periods under the previous contract?

**Answer:** TSET's media vendor of record is VI Marketing and Branding. This RFP was let as the current contract consisting of 6 yearly renewals is coming to a close.

**Question:** What is the reason for issuing this RFP? Are you desiring change from your current agency, fulfilling a legal requirement to rebid at the end of the contract period, or both?

**Answer:** The current media services contract is coming to a close requiring the letting of a new media services RFP.

**Question:** Are there any services you're requesting in this RFP that your current agency (if you have one) isn't providing, either because they don't have the capabilities or staff, or because you didn't ask for it on the previous contract? If so, what are those new scope items?

**Answer:** There are no new media services capabilities being requested.

**Question:** Do you prefer the OMES-related forms be merged with the PDF to create a single document submission, or should those documents remain separate files? If they are to be merged/included as a single PDF, will they still be withheld in the event of an open records request? Perhaps that's a reason to keep them separate.

**Answer:** Please keep those items stated as confidential from Open Records request separate.

**Question:** Is there anything your current agency (if you have one) is failing to do sufficiently or that has caused you frustration, delays, financial loss or inconvenience? If so, what, and how do you believe it can be remedied either by the incumbent agency or by a new partner?

**Answer:** The performance of the current agency is not the reason an RFP has been let.

**Question:** What sort of transition period do you envision in the event your contract is awarded to someone other than your incumbent agency (if you have one)? Are you expecting all ongoing campaign items to be maintained by the old firm for a transitional period of time, or for the new agency to immediately take them on and maintain them while working on new items? Is there a period where the two agencies will need to work together - and if so, how long?

**Answer:** A transition period of 3 to 6 months has been anticipated and would be implemented between January and June 2018 with the entirety of the contract transferring as of July 1, 2018.

**Question:** Since this is a 'reimbursement' arrangement, can you provide an estimate of the amount of money the agency is responsible for "fronting" TSET each month. If the budget has been roughly \$10mm annually, is it safe to say that monthly amount could be \$1mm, or even more, on occasion?

**Answer:** Monthly invoicing to TSET can range from \$750,000 to \$1.5 million typically and in some cases up to \$2 million for a given month.

**Question:** Who are the reviewers of our responses?

**Answer:** Reviewers are not disclosed prior to award.

**Question:** Are you asking for us to deliver spec creative as part of the assignment in 14.3?

**Answer:** *14.3 The bidder will provide a sample timeline including comprehensive process steps for developing a \$3 million statewide educational campaign for earned, owned and paid media*

*on Tobacco 21 targeting Oklahoma influencer and civically engaged audiences (of similar quality to current TSET campaign efforts). The bidder with the most complete overall project will be awarded all available points for that activity, with the remaining bidders receiving pro-rated scores as compared to the most complete overall plan.*

Spec creative is not required but would be considered if supplied.

**Question:** How many Task orders are issued annually and what percentage are Media, Production, and Other?

**Answer:** There are typically 10 to 13 Task Orders issued annually of varying amounts. Of the eight largest dollar Task Orders, the percent of budget dedicated to media by brand in FY2017 was: Tobacco Stops With Me 72%; Oklahoma Tobacco Helpline 75%; and Shape Your Future 70%; and, Oklahoma Tobacco Helpline SoonerQuit 75%. Production varies by brand need by year. Other Task Orders account for less than 8% of the overall budget.