

OHIO DEPARTMENT OF COMMERCE

REQUEST FOR PROPOSAL (RFP)

The Ohio Department of Commerce (COM) Division of Unclaimed Funds (UCF) is soliciting proposals for professional services.

1. PROJECT INFORMATION.

- 1.1 Project Title: Unclaimed Funds Creative Content Creation
- 1.2 Posting and Due Dates: September 21, 2022- October 11, 2022
- 1.3 Inquiry Start and End Dates: September 21, 2022- October 7, 2022
- 1.4 Department Background. The Ohio Department of Commerce (ODOC), Division of Unclaimed Funds (UCF) is responsible for safekeeping and management of unclaimed property which may consist of funds from a bank account, rent or utility deposits, uncashed checks, undelivered stock certificates, or unclaimed insurance policies. These properties are reported to the UCF who works aggressively to track down the rightful owner and reunite them with their hard-earned but forgotten money. All businesses that are located and/or operate in the State of Ohio, or hold funds due to Ohio residents, are required to file an Annual Report of Unclaimed Funds.

The Division's mission is to improve the quality of service to our customers by collecting unclaimed property equitably, managing the property wisely and effectively, and returning it timely to the rightful owners. To increase our ability to return funds to the rightful owners, the division has planned specific outreach strategies. UCF has defined outreach strategies as:

- Create awareness of unclaimed funds by preventing people from having dormant accounts or missing money
- Educate Ohioans on unclaimed funds and the claims process
- Provide proactive/direct outreach (done internally)
- Make it easy for Ohioans to get their unclaimed funds
- Develop and implement campaigns for target audiences
- Create strategic partnerships

- 1.5 Project Objective. . The purpose of this request for proposal (RFP) is to obtain proposals from qualified agencies interested in partnering with the UCF to provide creative concepts to target our audience and implement outreach strategies. UCF is seeking an agency with a proven track record for marketing and creative excellence, and expertise in advertising for innovative, relatable content creation.

The selected agency will provide creative digital marketing development and execution that educates Ohioans on the role of the division and resources available to support their needs. The agency will be responsible for developing creative marketing concepts that incorporate branding and creating fun and memorable messages and stories. The project will focus on two key messages: prevent people from having dormant accounts or missing money and educate people on unclaimed funds and the claims process. The project will adhere to Commerce's brand guidelines and maintain the department's voice, look, and feel. Collaborate with Department of Commerce's Communications team as needed.

The agency would also be responsible for marketing to a specific target audience. UCF has defined the target audience as:

- Aging Ohioans 45-65 years old to prevent the lost funds from occurring
- Retirees/Seniors/Aging Ohioans 50+ years old

The agency should also use the Division's tag line "Your money, come and claim it!" The agency would also ensure the Project meets these objectives:

- All creative content should be educational, entertaining, or empowering.
- Must include a Call to Action (CTA) – website, QR code (unless it's unwarranted)
- Identify and include tracking mechanisms

Agencies may partner with subcontractors to create a team that is suited to schedule and purchase media; however, there must be one "lead" agency that is primarily responsible for strategic guidance of the campaign and management of all partners/subcontractors. All billing would need to be managed through the lead agency.

Agencies shall immediately transfer ownership and possession to Unclaimed Funds of all content that relates to Ohio law and/or practice developed for any marketing campaigns or outreach created or disseminated upon termination of any Awarded Contract. Transfer all information and data requested by Unclaimed Funds, to Unclaimed Funds, its computer systems, or any other person or entity it directs in the format(s) that Unclaimed Funds selects.

1.6 Project Budget. Not to exceed \$49,000.00 annually.

1.7 Project Award. UCF reserves the right to execute multiple agreements with awarded provider to fulfill the entire project period, subject to and contingent on the discretionary decision of the Ohio General Assembly to appropriate funds (if *RFP Template Solicitation Request 9-2019* needed) for the biennium, satisfactory performance of the awarded providers, and the needs of the Ohio Department of Commerce.

1.8 Agreement Term. Initial term- October 20, 2022, through June 30, 2023.

1.9 Project Period. October 20, 2022, through June 30, 2025.

2. PROJECT REQUIREMENTS.

2.1 Contractor/Candidate Expertise Requirements.

2.1.1 Demonstrated ability and capacity to develop innovative, creative campaigns that engage audiences and achieve results.

2.1.2 Provide at least (5) examples of contractor's portfolio that showcase agency's capabilities and project experience that demonstrate successful results-oriented campaigns or media buying similar to UCF project scope and size.

2.1.3 Education, experience and list of staff that would be assigned to UCF projects.

2.1.4 Provide a list of (3) references of clients to include name, company name, phone, and email.

3. SCOPE OF WORK/DELIVERABLES AND DUE DATES.

The purpose of this work is to provide media scheduling and planning for multiple marketing channels to be executed as part of several campaigns reaching our defined target audience. If an agency responds to this RFP, its Proposal must put forward a scheduling solution that meets the following specifications:

	Scope of Work/Deliverables.	Approximate Due Date
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3.1	<p>Develop integrated multi-channel marketing campaigns incorporating UCF strategies and objectives ready for implementation. (See Appendix A for an example of a campaign to show you what we are expecting.)</p> <ul style="list-style-type: none"> • Provide consultation on creative content for specific mediums and suggested length of run time <p>Identify tracking mechanisms for each marketing channel to determine campaign results</p>	11/25/2022
3.2	<p>Develop concepts that will engage audiences and achieve results.</p> <ul style="list-style-type: none"> • Adhere to Commerce's brand guidelines and maintain the department's voice, look, and feel. Collaborate with Department of Commerce's Communications team as needed. • Create a minimum of (5) innovative, creative, relatable concepts 	11/25/2022
3.3	<p>Create all required content for campaigns (once approved).</p> <ul style="list-style-type: none"> • Provide content for paid media including newspaper, magazine, television, a PSA, and digital ads offering capability for A/B testing • Digital ads include, but are not limited to Google Ads, Facebook Ads, Twitter posts, retargeting and any other relevant marketing channel. (See Appendix B for a list of specific deliverables.) • Provide creative content in required formats for all mediums requested. • Promote the new Division website (https://unclaimedfunds.ohio.gov), utilize QR codes, bit.ly links, vanity 800#'s as appropriate for content. (See Appendix C for available calls to action.) Include any additional CTAs that your experience proves should be added. 	12/30/2022
3.4	Provide a template to generate outreach results report (editable format) to showcase campaign results.	1/30/2023

4. EVALUATION CRITERIA AND PROPOSAL SCORING.

CONTRACTOR/CANDIDATE EXPERIENCE		WEIGHT
4.1	Demonstrated ability and capacity to develop innovative, creative campaigns that engage audiences and achieve results.	10
4.2	Provide at least (5) examples of contractor's portfolio that showcase agency's capabilities and project experience that demonstrate successful results-oriented campaigns or media buying similar to UCF project scope and size.	30
4.3	Education, experience, and list of staff that would be assigned to UCF projects.	5
4.4	Provide a list of (3) references of clients to include name, company name, phone, and email.	5
WORK PLAN		WEIGHT
4.5	<p>Plan to develop integrated multi-channel marketing campaigns incorporating UCF strategies and objectives ready for implementation. (See Appendix A for an example of a campaign to show you what we are expecting.)</p> <ul style="list-style-type: none"> • Provide consultation on creative content for specific mediums and suggested length of run time <p>Identify tracking mechanisms for each marketing channel to determine campaign results</p>	20
4.6	<p>Plan to develop concepts that will engage audiences and achieve results.</p> <ul style="list-style-type: none"> • Adhere to Commerce's brand guidelines and maintain the department's voice, look, and feel. Collaborate with Department of Commerce's Communications team as needed. 	20

	Create a minimum of (5) innovative, creative, relatable concepts	
4.7	Plan to create all required content for campaigns (once approved). <ul style="list-style-type: none"> • Provide content for paid media including newspaper, magazine, television, a PSA, and digital ads offering capability for A/B testing • Digital ads include, but are not limited to Google Ads, Facebook Ads, Twitter posts, retargeting and any other relevant marketing channel. (See Appendix B for a list of specific deliverables.) • Provide creative content in required format for all mediums requested. • Promote the new Division website (https://unclaimedfunds.ohio.gov), utilize QR codes, bit.ly links, vanity 800#'s as appropriate for content. (See Appendix C for available calls to action.) Include any additional CTAs that your experience proves should be added. 	5
4.8	Plan to provide a template to generate outreach results report (editable format) to showcase campaign results.	5

PROPOSAL SCORING	MAXIMUM ALLOWABLE POINTS
Technical Proposal	500
Cost Proposal	100
MBE Set -Aside	50
Total	650

5. COMPENSATION FOR DELIVERABLES.

Agencies providing a proposal in response to this RFP shall provide expected compensation via the following table:

		COMPENSATION
5.1	Develop integrated multi-channel marketing campaigns incorporating UCF strategies and objectives ready for implementation. (See Appendix A for an example of a campaign to show you what we are expecting.) <ul style="list-style-type: none"> • Provide direction on creative content for specific mediums and suggested length of run time Identify tracking mechanisms for each marketing channel to determine campaign results	
5.2	Develop concepts that will engage audiences and achieve results. <ul style="list-style-type: none"> • Adhere to Commerce's brand guidelines and maintain the department's voice, look, and feel. Collaborate with Department of Commerce's Communications team as needed. • Create a minimum of (5) innovative, creative, relatable concepts 	
5.3	Create all required content for campaigns (once approved). <ul style="list-style-type: none"> • Provide content for paid media including newspaper, magazine, television, a PSA, and digital ads offering capability for A/B testing • Digital ads include, but are not limited to Google Ads, Facebook Ads, Twitter posts, retargeting and any other relevant marketing channel. (See Appendix B for a list of specific deliverables.) 	

	<ul style="list-style-type: none"> • Provide creative content in required formats for all mediums requested. • Promote the new Division website (https://unclaimedfunds.ohio.gov), utilize QR codes, bit.ly links, vanity 800#'s as appropriate for content. (See Appendix C for available calls to action.) Include any additional CTAs that your experience proves should be added. 	
5.4	Provide a template to generate outreach results report (editable format) to showcase campaign results.	
	Total Compensation	\$

6 INSTRUCTIONS.

- 6.1. Scope of Work and Specifications. COM is authorized to prepare scope of work and specifications to obtain supplies and services. The purpose of the scope of work or deliverables is to describe the supplies or services to be purchased and will serve as a basis for comparison of proposal responses.
- 6.2. Technical Proposal Format. Contractor's technical proposal shall address all items in the scope of work and deliverables and be submitted as the "Technical Proposal". Failure to sufficiently address each item may result in COM's determination that the Proposal does not provide sufficient detail to adequately evaluate the Proposal and is, therefore, incomplete, and nonresponsive. If the Proposal contains elements that exceed the requirements of the RFP, the Proposal should state the degree to which the requirement will be exceeded and how this will be accomplished. Proposals should be prepared simply and economically, providing a straightforward, concise, and complete description of the Contractor's proposal and capabilities to perform the Agreement. Emphasis should be on completeness, specificity, and clarity of content.
- 6.2.1. Company Narrative. Responses to the RFP shall include a short narrative describing the following:
- 6.2.1.1 Description of the Contractor's experience and expertise conducting projects of similar size and scope.
 - 6.2.1.2 Contractor's ability to meet minimum requirements.
 - 6.2.1.3 Contractor's capacity to provide the services required.
 - 6.2.1.4 Documentation of Contractor's soundness and financial capability to perform the work.
 - 6.2.1.5 List of three (3) references for whom the Contractor has performed similar services and deliverables. COM may, but is under no obligation to, contact the references.
- 6.2.2. Project Narrative. Responses to the RFP shall include a detailed project narrative describing the following:
- 6.2.2.1 Identification of the objectives, strategies, methodology, services and deliverables that Contractor proposes to provide.
 - 6.2.2.2 Use of evidence-based practices, if applicable.
 - 6.2.2.3 Timeline for completion of services and deliverables.
 - 6.2.2.4 Ability and experience of key project personnel intended to work on the project and their responsibilities to the project. Include resumes.

- 6.2.2.5 Identification and description of any proposed Subcontractors. Contractor may not subcontract any work or services of the type described in project scope of work and deliverables without COM prior written approval.
- 6.2.3 Project Work Plan. Responses to the RFP shall include a detailed project implementation plan describing the following:
 - 6.2.3.1 Clearly identify and discuss with specificity how the Contractor will perform the requirements specific to this project, including each item under Scope of Work and Deliverables.
 - 6.2.3.2 Description of the location and principal office from which the work is to be performed.
 - 6.2.3.3 Identification of the amount of time that lead, and key project personnel will be expected to work on the project.
 - 6.2.3.4 Description of contingency plans for completing the project, should the lead or key project personnel become unavailable for any reason.
 - 6.2.3.5 Identification of any anticipated difficulties in meeting the project specifications and a description of proposed solutions to these difficulties.
- 6.3. Contractor's Compensation. Contractor's proposed compensation by deliverable shall be submitted as the "Cost Proposal". If in the event an Agreement ensues as a result of this RFP, the Contractor will be required to fulfill the Agreement obligations at the amount proposed. The proposed cost must include all costs associated with performing the work, including travel, shipping, overhead, etc.
- 6.4. Proposal Submittal. Contractor must submit both a "Technical Proposal" and a "Cost Proposal" as a part of its Proposal package. These are two separate components which shall be submitted as separate electronic documents, clearly identified as either "Technical Proposal" or "Cost Proposal" and the RFP number.
- 6.5. When Proposals May Be Emailed. COM must receive proposals via email by no later than 3:00 p.m., the day the proposals are scheduled to be due. Proposals received after 3:00 p.m. on the scheduled opening date will not be opened.
- 6.6. Where Proposals Must Be Emailed. Proposals must be emailed (no fax, mailed or hand delivered proposals will be accepted) to the following email address: Monique.leatherman@com.state.oh.us
- 6.7. Proposals are a Public Record. Once proposals have been reviewed, they will be forwarded to the COM Project Evaluation Committee to begin the evaluation process. After proposals are opened, they are public records as defined in Ohio Revised Code Section 146.43 and are subject to all laws appurtenant thereto. Contractor may request that certain information, such as trade secrets or proprietary data, be designated as confidential and not considered as public records. Pricing is not considered as confidential. The decision as to whether or not such trade secrets or proprietary data shall be disclosed shall rest solely with COM.
- 6.8. Withdrawal of Proposal Prior to Scheduled Opening. Contractor may withdraw a proposal by written request any time after COM receives the proposal and before scheduled opening.
- 6.9. Withdrawal of Proposal After Scheduled Opening. Contractor may by written request withdraw its proposal after scheduled opening if there is reasonable proof that an inadvertent mistake was made, and the correction cannot be determined with reasonable certainty.
- 6.10. Correction of Proposal Before Scheduled Opening. If a Contractor withdraws its proposal and resubmits it with revisions, the revisions should be clearly identified and initialed by the Contractor. Any corrections must be completed off the COM premises.

- 6.11. Correction after Scheduled Opening. COM may permit a Contractor alleging an inadvertent error to correct its proposal after opening, only if the mistake and the correction are clearly evident from the proposal and correction does not affect the amount of the proposal or otherwise give the Contractor an unfair competitive advantage.
- 6.12. Proposals are Firm for 90 Days. Unless stated otherwise, once opened all proposals are irrevocable for ninety (90) days. Beyond ninety (90) days, the Contractor will have the option to honor their proposal or make a written request to withdraw their proposal from consideration.
- 6.13. Rejected Proposals. COM may reject any proposal in whole or in part, if any of the following circumstances are true:
- 6.13.1. Proposals are not in compliance with the required format stated in the RFP.
 - 6.13.2. Proposals do not address all of the requirements of the RFP.
 - 6.13.3. The price is excessive in comparison with market conditions or with the available funds of the Agency.
 - 6.13.4. COM determines that awarding any item is not in the best interest of the Agency.
- 6.14. Alternative Proposals. A Contractor may desire to submit an alternative proposal that achieves the purpose, specifications and scope of COM's request. A Contractor submitting an alternative proposal shall clearly identify and quantify the advantages of the alternative.
- 6.15. Proposal Preparation. COM assumes no responsibility for costs incurred by the Contractor prior to the award of the Agreement resulting from this RFP. Proposals may not include any amounts attributable to its preparation.
- 6.16. Contractor May Request Clarification. If a Contractor discovers an inconsistency, error or omission in this RFP, the Contractor should request clarification from COM Office of Procurement Services. Such clarification may be made only through email. No other form of clarification is acceptable. Failure of Contractor to comply may result in the Contractor being deemed not responsive.
- 6.17. Communication Prior to the Response Due Date. From the Release Date of this RFP until the date of the Agreement award, there shall be no communications concerning this RFP between any Contractor who may ultimately submit a Proposal and any employee of COM involved in the issuing of the RFP, or any other state employee who is in any way involved in the COM project, except as follows:
- An COM employee may send communications to potential Contractors with a link to COM's RFP announcement after the Release Date to encourage a diversity of Contractors to submit a Proposal.
- 6.18. COM Modifications to the RFP. When it is necessary to modify an RFP prior to the RFP opening, COM does so by written addendum only. Revisions to an RFP, after the RFP opening, shall be distributed to only those Contractors that submitted a proposal. A Contractor may elect to withdraw the proposal, provided that the Contractor files a written request within ten (10) calendar days of COM's distribution of the addendum.
- 6.19. Unit Costs. Contractors shall not insert a unit cost of more than two (2) digits to the right of the decimal point. Digits beyond the two (2) will be dropped and not used in the evaluation of the proposal.
- 6.20. Responsive Contractor. A Contractor is responsive if its proposal responds to the RFP completely and contains no irregularities or deviations from the RFP that would affect the proposal or otherwise give the Contractor an unfair advantage.
- 6.21. Responsible Contractor. COM will determine if a Contractor is responsible using the following factors:
- 6.21.1. Experience of the Contractor.
 - 6.21.2. Contractor's financial condition.

- 6.21.3. Contractor's conduct and performance on previous Agreement.
 - 6.21.4. Contractor's facilities.
 - 6.21.5. Contractor's management skills.
 - 6.21.6. Contractor's ability to execute the Agreement properly.
 - 6.21.7. Review of Federal and State debarment lists.
- 6.22. Information Requested. COM may request additional information to evaluate a Contractor's responsiveness to the RFP or to evaluate a Contractor's responsibility. If a Contractor does not provide the requested information, it may adversely impact COM evaluation of the Contractor's responsiveness or responsibility.
- 6.23. Samples. COM may require Contractors to provide samples or examples of work, at the Contractor's expense. Samples must be clearly identified by the Contractor, the RFP number, and the item the sample represents. COM will return samples that are not destroyed in testing, at the Contractor's expense, upon the Contractor's timely request. COM may keep the samples of the Contractor awarded the Agreement until the completion of the Agreement.
- 6.24. Estimated Usage. Unless otherwise stated, the usage indicated for each item(s), if applicable, are to be considered as estimates only and should be considered as information relative to potential purchases that may be made from the Agreement. COM makes no representation or guarantee as to the actual amount of the items(s) to be purchased.
- 6.25. Technical Proposal Evaluation. Proposals submitted by Contractors that do not meet the minimum requirements will not be evaluated. Proposals determined by COM to lack completeness, specificity or clarity of content may be deemed nonresponsive and, therefore, will not be evaluated. The remaining proposals will be evaluated, scored, and ranked by a committee of selected staff. Proposals will be evaluated by the technical review criteria.

The evaluation committee will assign a numerical rating to each technical competency in the above section 7 table of the RFP based upon a review of that Contractor's Proposal. The ratings are to be awarded as follows:

0 Points	Does Not Meet	Proposal does not comply with the requirements.
1 Point	Weak	Response does not substantially meet the requirements.
2 Points	Moderate	Proposal meets most of the requirements but is weak in some areas.
3 Points	Meets	Proposal meets all requirements.
4 Points	Strong	Proposal substantially exceeds requirements.
5 Points	Greatly Exceeds	Proposal significantly exceeds requirements.

The value assigned to each criterion is only a value used to determine which Proposal is the most advantageous to the Agency in relation to the other Proposals that COM received.

The evaluation committee will evaluate each proposal and award up to the maximum amount specified for each criterion. A proposal must receive a total technical score of at least 300 points (60 percent of the maximum total technical score of 500) for COM to consider awarding an Agreement for that proposal.

- 6.26. Presentations and Interviews. COM may require top Contractors to be interviewed. Such interviews will provide a Contractor with an opportunity to present its Proposal and to ensure a mutual understanding of the Proposal's content. This will also allow COM an opportunity to test or probe the professionalism, qualifications, skills, and work knowledge of the proposed candidates. The interviews will be scheduled at the convenience and discretion of COM. COM may record any presentations and interviews. The one (1) to three (3) highest scoring Contractors; but no more than the top three (3) may be required to participate. Interviews will be scheduled to be held in Columbus, Ohio at the Contractor's expense, if applicable.

- 6.27. Cost Proposal Evaluation. COM will calculate the Contractor's Cost Proposal points after the Contractor's total technical points are determined, using the following method:

Cost Points = (Lowest Contractor's Cost/Contractor's cost) x Maximum Allowable Cost Points as indicated in the "Scoring Breakdown" table. In this method, the lowest cost proposed will receive the maximum allowable points.

The number of points assigned to the cost evaluation will be prorated, with the lowest accepted Cost Proposal given the maximum number of points possible for this criterion. Other acceptable Cost Proposals will be scored as the ratio of the lowest Cost Proposal to the Proposal being scored, multiplied by the maximum number of points possible for this criterion.

- 6.28. Final Stages of Evaluation Contractor with the highest point total from all phases of the evaluation (Technical Points + Cost Points) will be recommended for the next phase of the evaluation.

Technical Score: _____ + Cost Score: _____ + MBE Score _____ = Total Score: _____

If COM finds that one or more Proposals should be given further consideration, COM may select one or more of the highest-ranking Proposals to move to the next phase. COM may alternatively choose to bypass any or all subsequent phases and make an award based solely on the Proposal evaluation phase.

- 6.29. Clarifications & Corrections. During the evaluation process, COM may request clarifications from any potential Contractor under active consideration and may give any Contractor the opportunity to correct defects in its Proposal if COM believes doing so does not result in an unfair advantage for the Contractor and it is in COM's best interests. Any clarification response that is broader in scope than what COM has requested may result in the Contractor's proposal being disqualified.
- 6.30. Agreement Negotiation. It is at the discretion of COM whether to permit negotiations. A Contractor must not submit a proposal assuming there will be an opportunity to negotiate any aspects of the RFP. When it has been determined that it is in the Agency's best interest to conduct negotiations, COM may request a submission of a best and final quotation.
- 6.31. Agreement Award. The COM Project Committee evaluating the Proposals and, if applicable, the Presentations will recommend to the Director of Commerce the award of an Agreement based upon the total Contractor score and whether awarding an Agreement will result in obtaining the best value and advantage to COM. The Director's award of an Agreement will be identified by the Director's signature on the Agreement. The Director's award is final and not appealable. COM at any time may determine that award of an Agreement is not in the best interest of COM and may reject, cancel, or re-issue this RFP in whole or in part.
- 6.32. Agreement Contents. If this RFP results in an Agreement award, the Agreement will consist of this RFP, along with attachments, addenda, purchase orders, change orders, and terms and conditions. COM reserves the right to award multiple Agreement under this RFP.
- 6.33. Contractor Start Date. COM expects the Contractor to commence work upon Agreement execution. If the Contractor is unable or unwilling to commence work, COM reserves the right to cancel the award and resume the evaluation process with the next most advantageous proposal.
- 6.34. Non-Collusion Certification. The Contractor certifies that he/she is (sole owner, partner, president, secretary, etc.) of the party making the forgoing proposal, that such proposal is genuine and not collusive or sham; that Contractor has not colluded, conspired or agreed, directly or indirectly, with any Contractor or person, to submit a sham proposal; or colluded or conspired to have another not proposal; and has not in any manner, directly or indirectly, sought by agreement or collusion, or communication or conference, with any person to fix the proposal price of its proposal or any other Contractor, or to fix any

overhead, profit or cost element of the proposal price, or of that of any other Contractor, to secure any advantage against any Contractor or any person or persons interested in the Agreement and that all statements contained in the proposal are true; and further, that the Contractor has not, directly or indirectly, submitted this proposal, or the contents thereof, or divulged any related information or data to any association or to any member or agent of any association.

- 6.35. COM Withdrawal of the RFP. COM reserves the right to withdraw the RFP at any time prior to the award the Agreement.
- 6.36. Damages Arising from RFP Specifications. A Contractor may not be compensated for damages arising from inaccurate or incomplete information in the RFP, specifications or from inaccurate assumptions based upon the specifications.
- 6.37. Protests. Objections to the Agreement award may be filed through a protest. Such protest must comply with the following information:
- 6.37.1. The protest must be filed by a prospective or actual Contractor objecting to the award of an Agreement resulting from this RFP. The protest must be in writing and contain the following information:
- 6.37.1.1 Name, address and telephone number of the protester;
 - 6.37.1.2 Name and number of the RFP being protested;
 - 6.37.1.3. Detailed statement of the legal and factual grounds for the protest, including copies of any relevant document;
 - 6.37.1.4 Request for a ruling by COM;
 - 6.37.1.5 Statement as to the form of relief requested from COM; and
 - 6.37.1.6 Any other information the protester believes to be essential to the determination of the factual and legal questions at issue in the written request.
- 6.37.2 A timely protest will be considered within the following periods:
- 6.37.2.1 A protest based on alleged improprieties in the issuance of the RFP, or any other event preceding the closing date for receipt of Proposals which are apparent or should be apparent prior to the closing date for receipt of Proposals, must be filed not later than five (5) business days prior to the Proposal due date.
 - 6.37.2.2 If the protest relates to the recommendation of the evaluation committee for an award of the Agreement, the protest must be filed within fifteen (15) business days of the award communication.
- 6.37.3 All protests must be filed at the following location:
- Ohio Department of Commerce
 - Procurement Services
 - Attention: Carol Cook
 - 6606 Tussing Road
 - Reynoldsburg, OH 43068
- 6.38. Minority Business Enterprise Program. COM is committed to making more Agreement and opportunities available to minority business enterprises (MBE) certified by the Ohio Department of Administrative Services pursuant to Section 123.151 of the Ohio Revised Code and Rule 123:2-15-01 of the Ohio Administrative Code. This RFP contains a sheltered solicitation requirement, which encourages the Contractor to seek and set aside a portion of the work to be exclusively performed by Ohio certified MBE businesses.
- 6.39. MBE Set-Aside. COM has included in the Evaluation Scoring Formula of this RFP, a provision for the Contractor to seek and set aside work for MBE subcontractors. In seeking proposals, the Contractor must:

- 6.39.1 Utilize a competitive process to which only Ohio certified MBEs may respond;
- 6.39.2 Have established criteria by which prospective MBEs will be evaluated including business ability and specific experience related to the work requirements;
- 6.39.3 Require the MBE subcontractor to maintain their certification throughout the term of the Agreement, including any renewals; and,
- 6.39.4 Propose the awarded MBE as a subcontractor under this RFP.
- 6.39.5 The following chart details the participation ranges and values that would be awarded to the Contractor for MBE participation.

MBE Participation Value Range	
Percentage of Work Offered	Percentage of MBE Points Available
0%	0
1% - 5%	10 Points
6% - 10%	20 Points
11% - 15%	30 Points
16% - 24%	40 Points
25% or greater	50 Points

- 6.39.6 For this RFP Ohio certified MBEs that are the prime must subcontract with an Ohio certified MBE to meet the above requirement.
- 6.39.7 For purposes of calculating the MBE Set-aside points, the State will not award any points for proposed MBE services that are optional elements of the Scope of Work.
- 6.40. MBE Reporting. After award of the RFP, the Contractor must submit a quarterly report to the Procurement Manager or designee documenting the work performed by and payments made to the MBE subcontractor. These reports must reflect the level of MBE commitment agreed to in the Agreement. The reports must be filed at a time and in a form prescribed by the Procurement Manager or designee.
- 6.41. Veteran-Friendly Business Enterprise (VBE) Program. The State of Ohio's Veteran-Friendly Business Enterprise (VBE) Procurement program provides preference to certified companies that compete to Agreement with the state to supply the goods or services it needs, including eligible construction services. In order to be eligible for certification, the applicant business must satisfy one of the following criteria:
 - 6.41.1 At least ten percent of its employees are veterans or on active service;
 - 6.41.2 At least fifty-one percent of the applicant business is owned by veterans or persons on active service;
 - 6.41.3 If the applicant business is a corporation fifty-one percent of which is not owned by veterans or persons on active service, at least fifty-one percent of the board of directors are veterans or persons on active service; or
 - 6.41.4 The business is certified by the United States Department of Veterans Affairs as a Service-Disabled Veteran-Owned Small Business or a Veteran-Owned Small Business and the owner(s) of the business meets the definition of veteran as defined in Rule 123:5-1-01(II) of the Ohio Administrative Code.

Appendix A

UNC Monthly Ad Campaign Example

Campaign Example – Please include this information at a minimum.

Target Audience

- 40-60 years old females
- Deceased relatives
- Interested in consolidating loans, finances, budgeting, refinancing, online banking etc.
- Ohioans

Campaign Goals

- Track campaign on website analytics
- Get 1 initiated claim per dollar spent on media buying
- Xxx # views/Impressions

Potential Reach

- 100,000 Ohioans

UNFDs Outreach Strategies - all tactics support one of these strategies

Create awareness of Unclaimed Funds focusing on:

- Educate people on the claim process

Campaign Plan:

Potential to run A/B testing on short vs long story

Short Story to tell

Hook - Over \$3 billion in unclaimed funds and most of forgotten money used to belong to individuals that have deceased. Heir could inherit this money!

Value – how to video of easy claims process

CTA – uclaimedfunds.ohio.gov

Long Story to tell

Catchy video content showing a mom paying for groceries, gas for the van, school shopping... But what if....daydreaming of winning the lottery and what her life could look like with more money.

Cut to a girlfriend telling her about UCF website and her searching her name. She searches her family members. She finds an insurance policy left to the heir of her father's name.

Cut to mom getting cash in the mail and smiling jumping up and down with excitement.

Cut to mom on family vacation with nanny and construction of new house etc.

Mediums for Advertising

Facebook Ad
Google Ad
TV PSA Commercial?

Timing

Recommended to run January thru March 2023

Recommended ad run minimum \$1000/month ad spend for digital

Measuring Results

#CTR from Facebook Ad to url

Claims initiated during length of Ad run

800 vanity #?

*Please remind Susie Wagner to share the NAUPA campaigns once they become available. Targeted date 12/1/22

Appendix B

List of Digital, Media, and Print Deliverables

Newspaper
Magazine
Television Ad
Public Service Announcement (PSA)
Retargeting ad
Facebook Ad
Google Ad
Twitter post
Hashtag Challenge (similar to ice bucket challenge)

*Must include workable files with links along with the finished formatted materials.
All large files can be shared via

Appendix C

Examples of Calls to Action (CTA) to utilize for UCF

<https://unclaimedfund.ohio.gov>

[#unclaimedfundsOhio](#)



Claiming Funds - bit.ly/OhioUnclaimedFunds

Claiming Funds Events - bit.ly/3ae1tk1