

Request for Proposals

(RFP)

FAFSA Completion Campaign

RFP Release: May 7, 2021
Proposal Due Date: May 19, 2021 at 5:00 p.m.

1. Overview and Scope

The State of Ohio is committed to ensuring that Ohio's students have the support they need to complete the Free Application for Federal Student Aid (FAFSA). Unfortunately, both nationally and in Ohio, the FAFSA completion rates have declined dramatically in the time of COVID-19. Recent data suggest that FAFSA completion rates in Ohio have declined 8.9% compared to the same period last year.

The FAFSA allows students to qualify for federal Pell grants, state grants, and most scholarships. Historically, the FAFSA has been one of the best predictors of enrollment in colleges, universities, and training centers. The decline in FAFSA completion represents a significant loss in funding for students and, likely, a significant decline in postsecondary enrollment in Ohio.

With the goal of encouraging more students to complete their FAFSA, the Chancellor of the Ohio Department of Higher Education is issuing this RFP for branding and marketing services to support outreach to Ohio's students and families with the goal of encouraging more Ohio students to complete their FAFSAs.

The Chancellor is seeking proposals from qualified vendor(s) and will review proposed services. The award of this RFP will result in a contract for up to **\$100,000** with the Chancellor.

2. Program Process

- RFP release date May 7, 2021
- Bidders call at 12 p.m. May 13, 2021
- Proposals Due by 12 p.m. May 19, 2021
- Review, score, and select vendor(s) May 19-May 21, 2021

- a) Release of the RFP from the Ohio Department of Higher Education posted at (<https://www.ohiohighered.org/grants>) on May 7, 2021.
- b) Responsive proposals should be emailed to FAFSA@highered.ohio.gov with the subject 'FAFSA Completion Awareness Campaign- [Name of Applicant]'. See section 6 for detailed submission instructions.

- c) The cost of preparation and delivery of the proposal are solely the responsibility of the applicant.
- d) The Chancellor will provide an opportunity for interested parties to seek clarification through a structured bidder call(s) and emailed questions. The bidders call is scheduled for May 13, 2021 and call in information will be posted at www.ohiohighered.org/grants no later than 24 hours before the call. Questions can be emailed to FAFSA@highered.ohio.gov and questions will be posted online www.ohiohighered.org/grants to provide the information to interested parties.

3. Proposal Criteria

Respondents are required to address and demonstrate expertise in branding, communications, and/or marketing. It is preferred that respondents also demonstrate expertise with statewide campaigns, educational campaigns, and/or the target audience (high school students and their families).

RFP responses may consist of two or more parties with shared capabilities and capacity partnering to provide the requested services. This RFP indicates the respondent as “vendor.” The vendor may identify as for-profit or non-profit organizations. The Chancellor may make one award to a lead party on behalf of a consortium or partnership.

4. Project Term

The project term will commence upon execution of an agreement with the Chancellor, anticipated to be no later than May 26, 2021. Services must be completed no later than December 31, 2021. A final program and reporting will be due from the vendor 30 days after the end of the expenditure period.

5. Evaluation & Proposal Scoring Criteria

The cost of preparation and delivery of the proposal are solely the responsibility of the respondent. The Chancellor’s staff and appointed review team will evaluate RFP responses based on predetermined criteria. The Chancellor reserves the right to contact any reference to assist in the evaluation of the proposal, to independently verify information contained in the proposal, and to discuss the vendor’s qualifications with any person or entity not affiliated with the Chancellor’s office. Finalists may be required to make a presentation of the proposal, which would occur in person or virtually. The

presentation cannot materially change the information contained in the proposal. The Chancellor shall evaluate the candidates and exercise independent judgment in making the final decision.

6. Proposal Contents & Page Limits, Format & Submission Instructions

This Request for Proposals (RFP) is designed to furnish detailed information regarding the responder's ability, expertise and capacity to develop a FAFSA completion awareness campaign directed at Ohio's high school students and their families, with a focus on students who graduated in 2020 or 2021, or who will be graduating in 2022 (the students most impacted by COVID-19). Additional information may be requested. All information submitted in response to this RFP is public information unless a statutory exception exists that exempts it from public release. Responses that are poorly formatted or submitted, incomplete or otherwise determined to not meet the format and submission guidelines may be removed from the pool for review.

Contents should be arranged in the following order and be at or less than the noted length:

1. Cover Page:

- Primary point of contact
- Contact information

2. Vendor Qualifications:

If multiple vendors, please provide information below for all vendors engaged.

- Indicate similar projects the vendor has worked on and the outcomes achieved.
- Indicate which staff member(s) will work on the project and include a brief biography of each staff member, demonstrating their experience with relevant work (resumes may be included in attachments).
- Provide a minimum of two client references (name, organization, phone, email).

3. Proposal Questions: Vendor should respond to the questions in 15 pages or less; supporting materials are not included in the page length.

- Please see Exhibit I for the proposal questions.

4. **Workplan:** Vendor should include a workplan that demonstrates how they will implement the plan. This workplan should include key deliverables, along with the corresponding timeline and assigned staff member(s).
 - Note that the vendor(s) will be required to submit a monthly report following the approved application timeline. The report will detail the work completed that month and planned activities/outcomes anticipated in the following month.
 - Vendor(s) should plan on 30 minute biweekly phone call conversations to provide status updates to the Ohio Department of Higher Education.

4. **Budget:** In an excel spreadsheet or table, the budget should document:
 - a. Costs for each deliverable.
 - b. The underlying assumption for each cost (i.e. base cost for item or service, number served, hours allocated, etc.).

5. **Appendix:** Must include answers to Exhibit II, optional supporting materials are welcomed.
 - a. Include a completed Exhibit II.
 - b. Optional supporting materials.

Submission Instructions:

Email the completed proposal to FAFSA@highered.ohio.gov with the subject 'FAFSA Completion Awareness Campaign- [Name of Applicant]' by 5 pm on May 19.

Assembling application materials into one PDF is preferred.

7. Legal Notice & Disclaimers; Obligations to Local, State & Federal Governments

All information submitted in response to this RFP become property of the Chancellor and is public information unless a statutory exception exists that exempts it from public release under the Ohio Public Records Act, as defined in Section 149.43 of the Ohio Revised Code.

The Chancellor reserves the right to request or use additional information to assist in the review process, to require new proposals from interested parties, to reject any or all proposals responding to this RFP, or to re-issue, modify or cancel the RFP if it is determined that it is in the best interests of the institutions and/or the state. Issuing this

RFP does not bind the Chancellor to issuing a contract. The Chancellor administers the process and reserves the right to adjust the dates for this process for whatever reasons are deemed appropriate. All costs incurred in preparation of a proposal shall be borne by the respondents and are not recoverable under an award. The decisions of the Chancellor are final. Respondents will be notified of the outcome of their proposal at the conclusion of the review process.

The respondents understand that the information provided in this RFP is intended solely to assist in the proposal submission process. To the best of the Chancellor's knowledge, the information provided is accurate; however, the Chancellor does not warrant such accuracy and any errors or omissions subsequently determined will not be construed as a basis for invalidating this RFP. Interested parties bear the sole responsibility of obtaining the necessary information to submit a qualifying proposal. By submitting a proposal, respondents expressly agree to these terms.

a. Obligations to Local, State & Federal Governments: The contract between the Chancellor and the chosen applicant ("vendor") will require the vendor to comply with all applicable federal, state and local laws in the performance of the project. Vendor(s) must accept full responsibility for payments of all unemployment compensation, insurance premiums, workers' compensation premiums, income tax deductions, social security deductions and any and all other payroll deductions required for all employees engaged on the performance of the work authorized by the contract.

Vendor(s) will be required to certify in the contract, among other things, that they do not owe any delinquent taxes or money to the state or a political subdivision of the state whether the amounts owed are being contested in a court of law or not.

b. Trade Secret Language: All information submitted in response to this RFP become property of the Chancellor and is public information unless a statutory exception exists that exempts it from public release under the Ohio Public Records Act, as defined in Section 149.43 of the Ohio Revised Code:

All Lead Respondents are strongly discouraged from including in a proposal any

information that the Lead Applicant considers to be a “trade secret,” as that term is defined in Section 1333.61(D) of the Ohio Revised Code. The institution or business asserting trade secret bears the responsibility to take formal action if necessary and defend such assertion. Otherwise, public records laws may require disclosure.

If any information in the proposal is to be treated as a trade secret, the proposal must:

- a. Identify each and every occurrence of the information within the proposal with an asterisk before and after each line containing trade secret information and underline the trade secret information itself;
- b. Identify that the proposal contains trade secret information in the cover letter; and
- c. Include a summary page immediately after the cover letter that lists each page in the proposal that includes trade secret information and the number of occurrences of trade secret information on that page.
- d. To determine what qualifies as trade secret information, refer to the definition of “trade secret” in the Ohio Revised Code at 1333.61(D), which is reproduced below for reference:

(D) “Trade Secret” means information, including the whole or any portion or phase of any scientific or technical information, design, process, procedure, formula, pattern, compilation, program, device, method, technique or improvement, or any business information or plans, financial information, or listing of names, addresses, or telephone numbers that satisfies both of the following:

(1) It derives independent economic value, actual or potential, from not being generally known to, and not being readily ascertainable by proper means by, other persons who can obtain economic value from its disclosure or use.

(2) It is the subject of efforts that are reasonable under the circumstances to maintain its secrecy.

e. The Ohio Department of Higher Education requires non-disclosure agreements from all non-Department of Higher Education persons who may have had access to proposals containing trade secret information, including evaluators.

f. If the Responder claims that a record is not subject to disclosure under the Ohio Public Records law based on trade secret, it will bear costs of defending this claim.

Questions should be directed to FAFSA@highered.ohio.gov with the subject “FAFSA Completion Awareness Campaign—Question”

EXHIBIT I

Selected vendor(s) should propose an awareness campaign focused on Ohio's students (particularly those who have graduated/are graduating in 2020, 2021, 2022) and their families. The campaign should encourage more students to complete the FAFSA. The campaign should be culturally responsive to the diverse students in Ohio.

In addition, the campaign should include branding (logo, colors) for Ohio's FAFSA work that can be incorporated into campaign content and also be used in related initiatives. The state has recently launched a statewide campaign, [FAFSA 21](#), and intends to continue prioritizing this focus area; the goal of branding is to help increase visibility of these efforts.

As vendor(s) respond, they should consider the following:

- **Timing & goals:** Given the timing of this contract, the vendor should envision the following in their planning:
 - May-August: Creating brand for Ohio's FAFSA initiative, focus on reaching 2020/2021 graduates who have not yet filled out the FAFSA (a key message may be, "it's not too late.")
 - September: Assess efficacy of FAFSA campaign, update materials
 - October-December: Focus on reaching 2022 graduates (a key message may be, "it is time to start"), preliminary assessment on efficacy in December.

- **Deliverables:** The vendor should design an effective campaign. Minimally, it is anticipated that an effective campaign might include:
 - a brand guide (logo, colors, tagline)
 - social media content (memes, videos, etc.)
 - printable collateral for schools to post/distribute

- **Communication channels:**
 - The Ohio Department of Higher Education and Department of Education are working collaboratively on FAFSA completion. Collectively, the departments have official Instagram, Facebook, and Twitter accounts from which to share information.

- In addition, the departments are able to disseminate information to nonprofits, school leaders, school counselors, and other entities interested in promoting FAFSA completion, who can then share materials through their communication channels and who have more opportunities to directly engage with students. These organizations may have access to other platforms beyond those that the state departments utilize.
 - Vendor(s) should ideally consider a two-pronged approach (materials to be shared via state channels versus materials to be disseminated by those in the field) in their response.
 - While it is anticipated that much of the awareness outreach will occur via social media, due to the limited broadband access in some homes, vendor(s) should propose alternative methods (e.g. radio, earned media, direct mail, printable posters for schools) to reach those students and families.
- *Durability of materials:*
 - Where possible, the goal is to create “evergreen” content that can be used throughout several FAFSA cycles or that can be easily updated for future FAFSA cycles.
 - There should be a consistent “brand” (logo, colors) representing the state FAFSA efforts that will appear on efforts related to this campaign and which will also be available for use on other state-created materials.

The Chancellor is seeking parties who can provide the needed capabilities to implement the following initiative:

- A. Developing, launching, and assessing an awareness campaign.
 1. Provide a summary of the awareness campaign strategy and how it would enable progress towards the goal of more Ohio students completing the FAFSA, be differentiated to meet the needs of Ohio’s diverse students/families, and utilize resources efficiently (for example, evergreen content or encouraging user-generated content).
 2. At a high level describe the content type that would be created (e.g. videos, hashtags, photographs, user-generated content promotion, radio spot, poster), the

associated platform(s) (e.g. Twitter, Facebook, radio, school-distributed), the audience (e.g. students or their families), the primary vehicle (e.g. state accounts or via stakeholders, such as schools and nonprofits) and any other detail needed to understand the intended use and impact of the proposed content.

3. Describe your research process to build effective content that encourages more FAFSA completions among Ohio's diverse students. Indicate if students, families, and stakeholders would be directly included in the research process, and if so, how.
4. Where materials are intended to be disseminated through a larger network, such as with school leaders and nonprofits, describe the dissemination support that might be provided (e.g. written guide with tips, live webinar, one-on-one support).
5. Does the proposal include direct content placement/ads coordinated by the vendor? If so, please indicate frequency, timing, and budget.
6. Describe how and when efficacy would be assessed.

EXHIBIT II

A. Vendor Certification Form

Please address the questions below in the chart. Please indicate Yes or No by putting an “X” in the appropriate column. For items 3-8, the timeframe is the last seven years. The vendor certifies that responses to the following statements are true and accurate.

Yes	No	
		1. The vendor has potential conflicts of interest.
		2. The vendor is subject to an “unresolved” finding for recovery under Revised Code Section 9.2.
		3. The vendor has had a contract terminated for default or cause.
		4. The vendor has been assessed for any penalties in excess of \$10,000.00, including liquidated damages, under any of its existing or past contracts with any organization (including any governmental entity).
		5. The vendor was the subject of any governmental action limiting the right of the vendor to do business with that entity or any other governmental entity.
		6. Trading in the stock of the company has ever been suspended with the date(s) and explanation(s).
		7. The vendor, any officer of the vendor, or any owner of a 20% interest or greater in the vendor has filed for bankruptcy, reorganization, a debt arrangement, moratorium, or any proceeding under any bankruptcy or insolvency law, or any dissolution or liquidation proceeding.
		8. The vendor, any officer of the vendor, or any owner with a 20% interest or greater in the vendor has been convicted of a felony or is currently under indictment on any felony charge.

B. Additional Details

If the answer to any item above is affirmative, the vendor must provide complete details about the matter. If conflicts of interest, please list all potential conflicts. The State may reject a proposal in which an actual or apparent conflict is disclosed. And the State may cancel or terminate the contract for cause if it discovers any actual or apparent conflict of interest that the vendor did not disclose in its proposal.

While an affirmative answer to any of these items will not automatically disqualify a vendor from consideration, at the sole discretion of the State, such an answer and a review of the background details may result in a rejection of the proposal. The State will make this decision based on its determination of the seriousness of the matter, the matter's possible impact on the vendor's performance under the contract, and the best interest of the State.

C. Additional Certifications

The vendor certifies that neither it nor any of its people that may work on or benefit from the Contract through the vendor has a possible conflict of interest (e.g., employed by the State of Ohio, etc.) other than the conflicts identified.

The vendor is not currently subject to an "unresolved" finding for recovery under Revised Code Section 9.24, and the vendor will notify the procurement representative any time it becomes subject to such a finding before the award of a contract arising out of this RFP.

(Signature)

(Date)