



**NYSIF REQUEST FOR INFORMATION  
CONTRACT MANAGEMENT SOLUTION**

**2023-86-IT**

**11/1/23**

**1. OVERVIEW OF THE NEW YORK STATE INSURANCE FUND**

The New York State Insurance Fund (NYSIF) was established in 1914 as part of the original enactment of the New York State Workers' Compensation Law. NYSIF's mission is to guarantee the availability of workers' compensation insurance at the lowest possible cost to New York employers and to provide timely, appropriate indemnity and medical payments to injured workers, while maintaining a solvent fund. Since inception, NYSIF has fulfilled the dual roles for which it was created: to compete with other carriers to ensure a fair marketplace and to be a guaranteed source of coverage for employers who cannot secure coverage elsewhere.

NYSIF is the largest workers' compensation carrier in New York State and among the top 10 largest workers' compensation carriers in the nation, insuring approximately 139,000 policyholders, with more than \$1.48 billion in in-force premium and approximately \$19 billion in assets. A self-supporting insurance carrier, NYSIF operates without taxpayer funding.

In addition to workers' compensation insurance, NYSIF provides disability benefits coverage for off-the-job injuries to more than 56,000 New York employers. In 2018, NYSIF added paid family leave as a component of its disability benefits product, providing New Yorkers with job-protected, paid time away from work to care for their families.

**2. PURPOSE OF THIS REQUEST FOR INFORMATION (RFI)**

The New York State Insurance Fund is in the process of gathering information on a Contract Management System.

There will not be a contract award for purchase of services or products directly resulting from this RFI. However, we may use this information garnered from the RFI process in future procurement(s). Respondents will be placed on a mailing list and will receive an announcement of any subsequent Request for Proposals (RFP) that may arise from the RFI. Any decision to subsequently issue an RFP for such services will be at the sole discretion of NYSIF, and NYSIF is under no obligation to initiate such an RFP.

All firms with knowledge of Contract Management Systems are encouraged to respond. In addition to responses received, NYSIF may ask companies to present their experience in an information sharing session with NYSIF staff.



### **3. GENERAL TERMS AND CONDITIONS**

Proprietary Information - Careful consideration should be given before confidential information is submitted as part of your response. Review should include whether it is critical for reviewing a response and whether general, non-confidential information may be adequate for review purposes. The NYS Freedom of Information Law, Public Officers Law, Section 87(2)(d) provides exceptions to disclosure for records or portions thereof. Among these "are trade secrets or are submitted to an agency by a commercial enterprise or derived from information obtained from a commercial enterprise and which if disclosed would cause substantial injury to the competitive position of the subject enterprise."

A respondent to the RFI who is taking advantage of this provision must clearly identify on each page of the submission that contains confidential or proprietary information the label "Confidential" or "Proprietary" and the identification of the page and section for which the exemption is requested. In addition, with regard to any particular section(s) for which an exemption is requested, pursuant to POL 89[5] the respondent must provide a written request to exempt the information from disclosure, including a written basis of the reasons why the information should be exempted by identifying: (i) why the disclosure of the identified information would cause substantial injury to the competitive position of the Contractor, or (ii) why the information constitutes critical infrastructure information which should be exempted from disclosure pursuant to §87(2) of the Public Officers Law. The written request and rationale can be by a separate document which refers to the specific page(s) and section(s) of the submission to which it refers.

Requests for exemption of the entire contents of a submission from disclosure have generally not been found to be meritorious and are discouraged. Kindly limit any requests for exemption of information from disclosure to bona fide trade secrets or specific information, the disclosure of which would cause a substantial injury to the competitive position of the firm or information which constitutes critical infrastructure information which may be exempted from disclosure pursuant to §87(2) of the Public Officers Law.

NYSIF cannot guarantee the confidentiality of any information submitted.

#### **NYSIF reserves the right to:**

1. Use any and all ideas submitted in response to the RFI.
2. Adopt all or any part of the vendor's response in selecting the optimum configuration to be used in an RFP.
3. Request RFI respondents to present supplemental information clarifying their responses, either in writing, in formal presentation, or by product demonstrations.
4. Accept or reject any or all information received, or to modify or cancel this RFI in part or in its entirety at any time.
5. NYSIF recognizes that information and cost figures provided in response to this RFI are nonbinding.



6. This RFI is being issued for data gathering purposes only. This RFI is not a contract offer, and does not commit NYSIF to award a contract, pay any costs incurred by Respondent in preparing a response, or to procure or contract for services or supplies. No contract can or will be awarded based on submissions.
7. Respondents are encouraged to respond to this RFI; however, failure to submit a response will not impact a respondents' ability to respond to any future competitive solicitation process (if any) for projects.
8. There are no representations or warranties regarding the accuracy or completeness of the information contained in this RFI. Respondents are responsible for making their own evaluation of information and data contained in this RFI and for preparing and submitting responses to this RFI.

#### **4. CALENDAR**

<b><u>DATE</u></b>	<b><u>EVENT</u></b>	<b><u>COMMENTS</u></b>
10/31/23	RFI Issued	
11/28/23 <b>2:00 PM EST</b>	Final date for submission of responses	Deadline for response to this RFI. Responses should be emailed to <a href="mailto:contracts@nysif.com">contracts@nysif.com</a> . Please include "NYSIF RFI #2023-86-IT" in the subject line of the e-mail.

#### **5. INQUIRIES/ISSUING OFFICE/DESIGNATED CONTACT**

All inquiries concerning this RFI will be addressed to the following Designated Contacts:

Vincent Ginardi

Supervising CMS

E-Mail: [contracts@nysif.com](mailto:contracts@nysif.com)

Alex Romano

CMS3

E-Mail: [contracts@nysif.com](mailto:contracts@nysif.com)

All amendments, clarifications and any announcements related to this RFI will be posted on NYSIF's website at: [www.nysif.com/procurement](http://www.nysif.com/procurement). It is the sole responsibility of the respondents to check the website for any amendments, clarifications or updates. All applicable amendment information must be incorporated into the firm's response.



## **6. REQUESTED INFORMATION**

NYSIF is seeking information in the following areas. RFI submissions must address the following requirements:

### **A. RFP Management**

1. Track, share and edit draft procurement documents within a contract management system.
2. Ability to 'find' or 'search' within the system for keywords.
3. Set milestones or calendar deadlines for projects.
4. Ability to send notification reminders for outstanding steps.
5. Ability for a Department to request a good or service with details.
6. Monitor timelines and calendar deadlines.
7. System must have approval abilities where different departments/staff can virtually approve documents after they have reviewed them.

### **B. Uploading:**

1. Outside portal for external submission of bids with appropriate security requirements.
2. Ability to tag and label uploaded documents via a drop-down menu.
3. Internal subcategories to track various documents (example: ISO docs, MWBE docs, appendices, references, FOIL).

### **C. Executed Contract:**

1. Ability to document and search term dates, contract caps and categories for executed contracts.
2. Allow for modifications of existing contracts (Amendments).
3. Ability to store any related contract documents.
4. Storage and Tracking of Post-Contract Documents (Insurances, Vendor Forms, etc)
5. Ability to assign contacts for each contract and categorize the contact based on specialty (example: CMS, Program Lead, Program Owner, Vendor Contacts)

### **D. Contract Compliance:**

1. Ability to send out various surveys internally or externally and track results.
2. Report results and actions to management.
3. Track and flag deficient contracts.
4. Sends automatic notifications regarding contract expiration.
5. Sends automatic reminders/alerts regarding milestones.

### **E. Integration with Other Programs**

1. Ability to integrate with other programs including but not limited to Microsoft Office, Adobe, and DocuSign.



**F. Administrative:**

1. Folders to track:
  - a. Policies and Procedures
  - b. Internal Controls
  - c. Org Charts
  - d. Executive Orders
  - e. Templates and memos
  - f. Contract documents
  - g. Strategic Plan

**G. Miscellaneous**

1. Ability to set user access levels and permissions.
2. Ability to send notifications via outlook.
3. Ability to archive contracts that have expired.
4. Outline the number of unique areas that can be created to track documents.

NYSIF is looking for an in depth look at a Contract Management Solution. Please include any information in addition to the items listed above, that your firm can provide to further educate NYSIF on Contract Management Solutions.

**7. PRESENTATION/INTERVIEW**

NYSIF, at its own discretion, may ask respondents to give a presentation/interview. If NYSIF conducts presentations/interviews as part of the information gathering process, NYSIF's review committee may use the information gathered during this process to develop RFP specifications.

Presentations may be up to 90 minutes. Questions may be asked by the review committee based on material covered in the presentation/interview.

Presentation/interviews will be conducted in New York City, Albany or virtually. It will be the responsibility of the respondents to present the appropriate staff to discuss the products, at the scheduled time. Respondents will be responsible for any and all costs associated with the presentation. Appointments will be made at least one week prior to the scheduled presentation/interview date. There is no guarantee expressed or implied that a firm will be asked to make a presentation and no product or services will be procured through this process.

**8. DUE DATE**

The due date for responses is 11/28/23, 2:00 p.m. (Eastern) to: [contracts@nysif.com](mailto:contracts@nysif.com). Please include "Response to NYSIF RFI #2023-86-IT" in the subject line of the e-mail. Responders assume all risks for timely, properly submitted deliveries.