



August 29, 2016

The following (Q&A) will serve as Amendment #2 to NYSIF's Request for Proposals (RFP) for Marketing and Communications Services, bid number 2016-17-ADM. Material in this Amendment supersedes any contradictory material in the RFP.

Please note that the due date for the submission of bids **remains unchanged**.

All bids are due 9/7/16, by 2:00 p.m.(eastern).

Sincerely,

A handwritten signature in black ink, appearing to read "V. Ginardi".

Vincent Ginardi
Contract Management Specialist

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Q and A

#	Question	NYSIF Response
1	Whether companies from Outside USA can apply for this?	See RFP Section 4.A. for mandatory requirements. Additionally, a foreign company must - be able to provide evidence of responsibility and legal authority to do business with NY State and, - not be a debarred business entity by NY State
2	Are we required to come over for meetings?	Yes, it is anticipated that there will be in-person meetings.
3	Can we perform the tasks (related to RFP) outside USA? (like, from India or Canada)	See RFP Section 4.A. for mandatory requirements. Additionally, a foreign company must - be able to provide evidence of responsibility and legal authority to do business with NY State and, - not be a debarred business entity by NY State
4	Can proposals be submitted via email?	Per the RFP, Proposals must be submitted in hard copy along with one exact electronic copy (CD/USB flash drive).
5	Is there precedent for the fund using an out-of-state advertising agency?	NYSIF does not currently have an agency relationship.
6	The workforce forms that we are required to fill out list Lawyers, legal assistants, etc. Why would we need to utilize these services for a marketing program?	The workforce titles listed are examples.
7	What are NYSIF's broad marketing goals and objectives? i.e., change perceptions about NYSIF, create demand for your sales organization, etc.? What do you hope to accomplish at a very high level, from your investment in marketing?	NYSIF's main objectives are to serve our customers well by improving the image and tone of all communications, with the immediate goal of promoting increased use of our website as a place to conduct business with NYSIF via self-service; and to launch a sustainable presence in visual media.
8	Why now? What circumstances make now the right time for NYSIF to issue an RFP for outside Marketing and Communication Strategy support?	NYSIF is in the process of completing a year-long re-design of its website. NYSIF needs additional tools to help us expand our communications with our customers.
9	Does NYSIF currently have an agency relationship? If so, how long has that agency been in place and why are you looking to make a change?	NYSIF does not currently have an agency relationship.
10	What are NYSIF's anticipated spending levels for marketing and communications on annual basis?	As this is a competitive procurement, the budget will be dependent upon the submitted bids.
11	How is NYSIF's current marketing budget broken down by media, PR, website, etc.?	NYSIF's current marketing budget is determined by NYSIF's need at that point in time.
12	How much of an emphasis has NYSIF placed on PR and social media?	NYSIF currently has a public and social media presence and has made a commitment to augment initiatives in these areas.
13	Is there an internal marketing and communications organization and if so, what functions/roles is it comprised of?	NYSIF has a small marketing and communications team. The in-house staff writes all press releases, publications and website content, as well as manages NYSIF's social media presence and media relations.
14	Does NYSIF currently use any type of marketing automation tool?	Yes, NYSIF uses ExactTarget for marketing emails.

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15	Are the 10 employees to be assigned to the NYSIF Account per Mandatory Requirements expected to be FTE's, dedicated solely to NYSIF? If not, is the expected level of effort reflected in the Estimated Hours in Appendix Z?	NYSIF expects the successful bidder to advise NYSIF on the best ways to achieve its objectives, using the bidder's employees to the best advantage. Work product/time will be dependent on the media/marketing strategies decided for each project.
16	In the RFP Form B Contractor's Annual Employment Report (page 96), it states that the contractor will agree to report "3. Total compensation paid to all employees that performed consultant services under such Contract." Can you clarify the data to be reported? Is it individual salaries, or collective salaries paid to the NYSIF team at the agency?	Per the Contractor Consultant Law, Form B instructions, " Total compensation paid to all employees that performed consultant services under such Contract." Legally, compensation is defined as "remuneration and other benefits received in return for services rendered" or "payment for work."
17	What was the cost last year?	NYSIF did not contract for Marketing and Communications services last year.
18	Who was the contractor?	NYSIF did not contract for Marketing and Communications services last year.
19	Where can I get a copy of the contract?	N/A, there was no contract.
20	What was the bid tabulation for last year?	N/A, there was no bid tabulation.
21	Is there a local vendor preference?	No.
22	Is bonding required?	No.
23	What is the marketing budget?	NYSIF's current marketing budget is determined by NYSIF's need at that point in time.
24	How many agencies are responding to your RFP?	NYSIF does not require agencies that access the procurement page to register. Therefore, we do not know how many agencies will respond until the due date.
25	Who is your current agency and are they among the bidders? Are they M/WBE certified?	NYSIF does not currently have an agency relationship.
26	Describe your assessment of your current agency in terms of your relationship, their work and the results they have achieved.	NYSIF does not currently have an agency relationship.
27	What qualities are most important to you in working with a marketing partner?	The successful bidder will become a partner that listens to our needs, exhibits an understanding of what we are trying to convey and help us translate our objectives into a successful marketing strategy. The successful bidder will also advise NYSIF as to best practices for each particular initiative, providing clear direction on how to execute these strategies.
28	What is the biggest business challenge you face today?	NYSIF's biggest business challenge is understanding and prioritizing our customers' business needs and delivering an enterprise solution for those needs.
29	What new products will you be launching?	In the Fall of 2016, NYSIF will be launching its newly redesigned website. In addition, NYSIF has a series of products and initiatives under development aimed at providing customers additional tools for doing business with NYSIF more efficiently.
30	What is the anticipated Media Budget per year?	As this is competitive procurement, the budget will be dependent upon the submitted bids.
31	What is the % of media \$\$ allocated to each medium (TV; Radio; Print; Outdoor; Internet)?	There is no set percentage. NYSIF's current marketing budget is determined by NYSIF's need at that point in time.

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#	Question	NYSIF Response
32	Will NYSIF be assuming liability with Media vendors or prepaying agency to accept liability of NYSIF's behalf?	Media vendors are treated as subcontractors of the awarded bidder. Per the RFP, "If NYSIF allows subcontracting, the Bidder shall require that any subcontractors hired carry insurance with the same limits and provisions provided herein."
33	Can you provide the average number of annual projects and scale anticipated in each category? (i.e. digital content creation; website optimization; new products launches; media campaigns	In the Fall of 2016, NYSIF will be launching its newly redesigned website. In addition, NYSIF has a series of products and initiatives under development aimed at providing customers additional tools for doing business with NYSIF more efficiently. The successful bidder will advise NYSIF as to best practices for each particular initiative, providing a clear direction on how to execute these strategies.
34	Questions 1, 3 and 6 refer to providing relevant examples of client work "of similar or greater size of facility and scope". Can you please quantify the size and scope of the activity in terms of FTE hours as well as an overall budget? Please separate media dollars from fee and production dollars.	Please refer to the Appendix Z for estimated hours.
35	Question 8 refers to a need of ten (10) employees assigned to the business. Is your assumption that these individuals will be dedicated in whole or in part to the business?	NYSIF expects the successful bidder to advise NYSIF on the best ways to achieve its objectives, using the bidder's employees to the best advantage. Work product/time will be dependent on the media/marketing strategies decided for each project.
36	How do you measure efficacy and/or how do you characterize success?	NYSIF measures efficacy by results that improve our services and relationships with customers. NYSIF characterizes success by delivering appropriate customer service and providing tools to customers, enabling them to do business with NYSIF more efficiently (ex: increased self-service web visits, increased online registration, improved customer feedback).
37	What are the Key Performance Indicators that you manage, measure and report on?	KPI will be developed in conjunction with the successful bidder. NYSIF expects the successful bidder to advise NYSIF on the best ways to achieve its objectives, and how to measure the success accordingly.
38	For Appendix Z: FEE SCHEDULE PROPOSAL, can you either supply an unlocked version OR decrease the font size in the calculation table OR increase the cell size of the far right column? When Total Five Year Cost reaches six-figure sums, there is not enough room to display the totals and the ##### appears instead of the numeric values.	This issue was addressed in Amendment 1, posted on August 19.
39	Is there an incumbent agency that NYSIF is currently working with on Marketing & Communications Services?	No.
40	One of the stated purposes for the campaign is to "improve NYSIF's image." Is there existing research that explains the current NYSIF image perception or the desired state?	No, only anecdotal.

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41	Under Section C, "services to be provided", are there any specific parameters in terms of the amount of deliverables that need to be executed? Are there specific activities currently planned for year one, for example?	In the Fall of 2016, NYSIF will be launching its newly redesigned website. In addition, NYSIF has a series of products and initiatives under development aimed at providing customers additional tools for doing business with NYSIF more efficiently.
42	The RFP notes that your website is currently undergoing a redesign. What is the timeframe for that to be completed? Is that being done in-house with the NYSIF technology team or who is doing that work and will the selected supplier from this RFP be collaborating on that as well?	NYSIF's re-designed website is expected to be launched this Fall. Design and content are being completed by NYSIF in-house staff. The selected supplier is not expected to assist with the redesign.
43	How are you currently buying media? Are you doing that in-house or using a media buying agency?	Buying media is done in-house, via a procurement process.
44	What do you imagine your needs might be in terms of the market research activities each year?	NYSIF expects the successful bidder to advise NYSIF on the most productive market research activities consistent with our project needs.
45	Section 1, General Information, Paragraph F Insurance Requirements: Is it ok for Bidder to provide written notice to NYSIF since insurer will not endorse a policy to provide written notice?	<p>Section 1.F. Paragraph 2 is hereby deleted and replaced with the following:</p> <p>"All insurance required by the RFP shall be obtained at the sole cost and expense of the Bidder, shall be maintained with insurance carriers licensed to do business in New York State and acceptable to NYSIF, shall be primary and non-contributing to any insurance or self insurance maintained by NYSIF, and shall name NYSIF, its officers, agents, and employees as additional insureds hereunder (General Liability Additional Insured Endorsement shall be on Insurance Service Office's (ISO) form number CG 20 26 11 85).</p> <p>NYSIF shall be provided with written notice from the bidder at least thirty (30) days prior to the cancellation, non-renewal, or material alteration of such policies, which notice, evidenced by return receipt of United States Certified Mail, and shall be sent in accordance to the 'Notice' provision of the Agreement."</p>
46	Section 1, General Information, Paragraph G Participation of NYS Business Enterprises: Is Bidder required to have more than one MWBE if a subcontractor is certified as both minority- and women-owned business enterprise?	No. NYSIF's goal for the entire project is 30% MWBE participation. If the chosen contractor is themselves an MWBE, it would constitute 100% participation.
47	Section 2 , Bid/Proposal Format, #6 Comments and Limitations: Is this the section where we note recommended changes to Appendix C Contract Provisions?	Yes.
48	Do you have an overall budget for the project? Is the \$100,000 media cost a firm number or used for evaluation purposes of the RFP?	As this is competitive procurement, the budget will be dependent upon the submitted bids.
49	Are there target markets for the campaign(s) or is it statewide?	Statewide, as well as targeted customer campaigns specific to particular initiatives.

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50	Is there a seasonality tied to the campaign(s)? (i.e., holiday, spring, etc.)	Generally not.
51	Is NYSIF working with an agency now and can you say who that is?	NYSIF is not currently working with an agency.
52	Who does NYSIF consider to be the top competition?	Insurance carriers licensed to sell workers' compensation in New York State.
53	What are examples of threats that NYSIF feels need to be considered in order to grow business?	N/A
54	What are examples of in-category advertising and communication materials that NYSIF likes?	Generally, please see websites of large national workers' compensation carriers.
55	What are the top business objectives for NYSIF in the short and long term?	NYSIF's main objectives are to serve our customers well by improving image and tone of all communications, with the immediate goal of promoting increased use of our website as a place to conduct business with NYSIF via self-service; and to launch a sustainable presence in visual media.
56	Please break down your current client base with respect to business type, employee size and revenue?	With more than 160,000 policyholders, over \$2.7 billion in annual written workers' compensation premium and \$17 billion of assets, NYSIF is the largest workers' compensation carrier in the state and among the top five largest workers' compensation carriers in the nation. Eighty percent of NYSIF workers' compensation policyholders have a premium less than \$10,000. NYSIF provides disability benefits coverage for off-the-job injuries (including pregnancy) to more than 61,000 New York employers, totaling a premium of \$18 million.
57	What is your new client criteria in relation to business type, employee size and revenue?	NYSIF is a competitive insurance company that is required by state statute to write coverage for businesses of any type, size or revenue.
58	How has your paid media been performing and are there paid media benchmarks you would like the new agency to hit?	Paid media has been performing as expected. We anticipate discussing benchmarks with the successful bidder.
59	Is there an NYSIF style guide available for review?	Not at this time.
60	What are examples of new products that will be coming out over the next 18 months?	In the Fall of 2016, NYSIF will be launching its newly redesigned website. In addition, NYSIF has a series of products and initiatives under development aimed at providing customers additional tools for doing business with NYSIF more efficiently.
61	Do you need help recruiting sales reps?	No.
62	General Info, F.6.: Will bidders have the opportunity to propose changes to the insurance requirements in order to allow an organization to be in compliance?	No, NYSIF requires suppliers of goods and services, licensees, permittees, Contractors and tenants to maintain insurance covering the Agency against claims or judgments. NYSIF requires proof that these requirements have been met, through the submission of a Certificate of Insurance and applicable amendatory endorsements. Evidence that the bidder's required insurance is in place must be provided in an acceptable format. These guidelines provide guidelines for including insurance requirements in contracts and monitoring compliance with those requirements.
63	Section 2, B.3: Should the Fee Schedule Proposal be on a separate flash drive from the proposal?	Yes.
64	Section 2, B.4 : Are the "technical publications" (referred to at the top of page 13 of 22) meant to be examples of bidder work?	If a Bidder references a technical publication in their description of their technical experience, the publication should be provided.

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65	Section 2, B: Is there a page limit for the proposal?	No.
66	Section 2, B.5: What should be included in the Statement of Competing Commitments names—names of clients or number of clients key personnel will be working on while working on NYSIF?	Per the RFP, "a list of any contractual obligations they have entered into which requires effort on the part of their key personnel during the period in which these personnel will be working on the contract resulting from this RFP."
67	Section 2, B.6: Under Comments and Limitations, please clarify we need to address these in our response, outside of the Q&A submitted on 8/22.	Per the RFP, "All comments and limitations to non-mandatory specifications in this RFP must be listed, cross referenced to the response to which it applies, clearly explained and submitted during the Question and Answer period."
68	Section 4, A. 1: How does NYSIF define media—paid or earned? And how does it define communications—earned, social media, partnerships, events, etc...?	Media: earned. Communications, including but not limited to: social media, website, routine correspondence, forms, publications, press releases, specific stakeholder group correspondence.
69	Section 4, A. 4: How should subcontractors and/or partners be accounted for in the organizational chart?	The organizational chart should include divisions and sections, including executive. Individual employees or partners do not need to be identified by name.
70	Section 4, A. 4: Should the organization chart include all agency staff, or only staff working on this account?	The organizational chart should include divisions and units, not individuals.
71	Section 4, B.1: Does "government municipality" also include national government agencies and organizations?	Yes.
72	Section 4, C.d.: Has NYSIF already started the website development? If so, far along is the process?	NYSIF's re-designed website is expected to be launched this Fall. Design and content are being completed by NYSIF's in-house staff. The selected supplier is not expected to assist with the redesign.
73	Appendix C: Will bidders have an opportunity to propose revisions to the terms and conditions found in the Contract Provisions (Appendix C)?	Per the RFP, "All comments and limitations to non-mandatory specifications in this RFP must be listed, cross referenced to the response to which it applies, clearly explained and submitted during the Question and Answer period."
74	Appendix Z: What is the approximate value of the annual contract?	As this is competitive procurement, the budget will be dependent upon the submitted bids.
75	Appendix Z: Is the media budget actually \$100,000 or is that number a placeholder for "apples-to-apples" comparison of bidders?	This number is an estimate provided for evaluation purposes.
76	Has NYSIF done research on key target audiences (employers, employees, providers, business owners, etc.) in the past two years?	No.
77	Is there an incumbent for this work?	No.
78	Is there a requirement or does NYSIF have any interest in rebranding?	Not at this time.
79	Who will be the direct contact on this account?	This information will be provided upon contract execution
80	Does the direct contact have a marketing/communications team? If so, how many people are on the team?	NYSIF has a small marketing and communications team. The in-house staff writes all press releases, publications and website content, as well as manages NYSIF's social media presence and media/marketing relations.

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81	What are your greatest marketing/communications challenges?	A marketing/communications challenge is properly understanding and prioritizing our customers' business needs and delivering an enterprise solution for those needs. Further, NYSIF would like to improve all communications, enabling all customers to quickly find the appropriate information to satisfy their business needs.
82	What are your key success measures?	KPI's will be developed in conjunction with the successful bidder. NYSIF expects the successful bidder to advise NYSIF on the best ways to achieve its objectives, and how to measure the success accordingly.
83	Is there an incumbent?	No.
84	If so, who is the incumbent?	N/A.
85	How long has the incumbent had this contract?	N/A.
86	May we have a list of vendors who have expressed an interest by submitting questions?	NYSIF will not release a list of vendors who submitted questions.
87	Are there any benchmark research studies to better understand perceptions of NYSIF among its constituencies?	No.
88	What are the in-house capabilities of NYSIF in terms of marketing, PR, personnel and production?	NYSIF has a small marketing and communications team. The in-house staff writes all press releases, publications and website content, as well as manages NYSIF's social media presence and media/marketing relations.
89	Is there a summary of past paid media plans for prior campaigns that you can share?	No.
90	How has NYSIF evaluated success in marketing efforts? Specifically, are there specific metrics, quantitatively and/or qualitatively? Have they shifted in recent years?	Nothing formal.
91	What are the specific challenges/messaging needs by customer groups (policy holders, claimants, and insurance representatives)?	A marketing/communications challenge is properly understanding and prioritizing our customers' business needs and delivering an enterprise solution for those needs. Further, NYSIF would like to improve all communications, enabling all customers to quickly find the appropriate information to satisfy their business needs.
92	Does the estimated budget include out-of-pocket expenses such as printing?	Per the RFP, yes.
93	Will NYSIF provide a budget and budget delineation by effort for the last fiscal year?	As this is competitive procurement, the budget will be dependent upon the submitted bids.
94	Page 21, " BIDDER CERTIFICATIONS" says "The Bidder agrees to comply with all terms of Appendix A, Standard Clauses for NYS Contracts." Are we permitted to propose modifications to this contract?	Per the RFP 2.B.6. "No comments, limitations or changes are permitted with respect to any of the terms and conditions contained in Appendix A, Standard Clauses for New York State Contracts."