

**RFQL 3209 Proposer Questions**

- 1. To reiterate, NYSERDA is compiling a list of qualified contractors to market some or all of the listed initiatives. Correct?**

Yes. NYSERDA will select and rank proposers for each category: Commercial/Industrial/Multifamily, Residential/Low-to-Moderate Income, Communities and Local Government, Innovation and Cleantech Entrepreneurs, Research and Policy, Strategic Communications, Clean Energy Competitions. NYSERDA anticipates selecting a maximum of three proposers for each category. See page 1 of RFQL 3209 for more details on the selection process.

- 2. Is this a new project/contract? If not, who is the incumbent?**

NYSERDA qualified a pool of marketing firms to provide marketing support from 2010 – 2016. This solicitation was issued to select a new pool of contractors. Previous pool of Marketing contractors included: Eric Mower and Associates, Brand | Cool, Zone 5, Inc., Conservation Services Group, FARM (SKM Group), ICF, Arch Street Communications.

- 3. How should signed proposal checklists and disclosure forms be submitted if it is to be transmitted electronically?**

Signed copies of Attachment A: Proposal Checklist and Attachment B: Disclosure of Prior Findings of Non-responsibility should be scanned and submitted electronically with the rest of the proposal.

- 4. Can you please provide some detail regarding how evaluation criteria is weighted? I.e., Are there certain proposal evaluation criteria that are more important than other criteria items? Can you assign a percentage to each evaluation point to understand importance?**

Evaluation Criteria:

<b>Area of Evaluation</b>	<b>Criteria (as outlined in RFQL)</b>	<b>Point Value (out of 100 points)</b>
Knowledge of New York State	Demonstrates knowledge of proposed sector, market actors, audiences, and NYS energy markets	30 points
Experience and Qualifications	Demonstrates experience and qualifications required to meet marketing support needs  Satisfactory record of performance	20 points
Strategic Approach	The extent to which the proposer demonstrates an understanding of and	30 points

	<p>develops a proposal to address proposal requirements and Marketing Approach Assignments.</p> <p>The quality of the proposer's approach as reflected by the responsiveness, thoroughness, strategic thinking, and creativity of the strategy.</p> <p>The potential of the approach to achieve program goals.</p>	
Cost	Cost effectiveness and competitive rates	20 points

**5. For Attachment C (Project Personnel & Rates) do you want us to provide rates for just year one or for all three years of the contract?**

If rates are different for years two and three, that should be identified in the proposal.

**6. We didn't find anywhere in the RFQ where you requested bios/resumes of team members. Is this something you would like? Could we include as an appendix?**

Proposers should use their judgement regarding what information should be included to best demonstrate the project team and their firms' qualifications and experience and to be responsive to all components of the RFQL.

**7. Is there a page limit to Part I? If so, are work samples considered part of that page limit, or can they be included in a separate attachment?**

There is no page limit for Part I stated in the RFQL. Proposers should use their best judgement as to how many pages are required to adequately address all components of Part I.

**8. Are there any font style/size requirements?**

No

**9. For clarification: Do you want an Attachment C (Rate Sheet) included in Part I and additional Attachment Cs for every category a bidder responds to in Part II?**

An Attachment C listing the relevant staff positions and rates should be included for each category to which a proposer is responding. Necessary staff positions or subcontractors may vary depending on the needs in a specific category. Refer to page 8 of RFQL 3209 for proposal requirements and format.

**10. Outside of the sub-contractors, is there a preference for a local firm?**

All firms that meet the Proposal Requirements (page 8) outlined in the RFQL will be evaluated based on the Evaluation Criteria outlined in Section IV: Proposal Evaluation (page 33). Additional points will not be given based on location of the firm; however, knowledge and experience of New York State energy markets is an element that is considered in the evaluation criteria.

**11. What does your ideal firm look like?**

NYSERDA is seeking full-service marketing firms with knowledge and experience in the categories outlined in Section II: Program Requirements and that meet the evaluation criteria outlined in Section IV.

**12. Can the State confirm what contract type they are looking for? (FFP, T&M, etc.)**

The contracts NYSERDA enters into with marketing firms will include agreed upon hourly rates and overhead/profit rates. The contractors will be paid for hours and for any necessary materials or purchase of media, etc. made with the pre-approval/permission of NYSERDA.

**13. Could you explain how the bidding works? Especially the part regarding the bidding on \$1 million projects.**

NYSERDA will select and rank proposers for each category identified. NYSERDA anticipates selecting a maximum of three proposers for each category. Future projects of \$1 million or less will be assigned to the first ranked prequalified firm in the appropriate category, or, at NYSERDA's discretion, and based on the project scope of work and current workload of contractors, a mini-bid may be issued to all prequalified firms in that category. Future projects greater than \$1 million will be mini-bid to the prequalified firms in the appropriate category.

For example, if NYSERDA is ready to move forward with a Residential marketing project, and the budget is \$1.5 million, NYSERDA would issue a mini-bid to the firms prequalified in the Residential category. NYSERDA would evaluate the responses to the mini-bid based on the criteria outlined for that project and award one of the firms the work. If the budget for that Residential project is \$400,000, that project would automatically go to the first-ranked firm in the Residential category.

**14. Will those who are ranked 2 or 3 in a given category be offered priority when subcontracting or MWBE participation is required?**

Firms should identify any potential subcontractors (regardless of MWBE status) at the time they submit their response to RFQL 3209. If the first-ranked prequalified firm in a category is awarded a project, that firm will use the subcontractors identified as part of their original proposal. NYSERDA will not be matching contractors to subcontractors through this process.

**15. Can you describe the NYSERDA team, will there be a primary point of contact for the agency and for approvals or a committee?**

Each project will be managed by one of NYSEDA's Marketing Project Managers. That person will be the primary point of contact and will handle day-to-day communications and workflow. Approvals for marketing campaigns and materials will be obtained from the Marketing Project Manager, the Director of Corporate Marketing, the Director of Communications, and, if applicable, the Governor's Office.

**16. On page 9 in the Summary document you reference "If rate(s) is approved by an independent organization, such as the federal government, provide a copy of such approval." Can you please provide some more information around rate approval here? Are there any other independent organizations you can reference that may be relevant?**

General Services Administration (GSA) is an independent agency of the United States Government that provides comprehensive solutions for products and services across the government. GSA assists with procurement work for other government agencies. As part of this effort, it maintains the large GSA Schedules, which other agencies can use to buy goods and services. [gsa.gov](http://gsa.gov)

**17. How are out-of-pocket expenses treated? Are those reimbursable?**

Out-of-pocket expenses, such as travel for meetings, are reimbursable. They would be included with documentation and receipts in monthly billing for the contract. Travel, lodging, meals, etc. should follow the current state government per diem/rates, whenever possible.

**18. What is the marketing budget for each category? Is this budget to cover all costs – market research, marketing development, fulfillment and media costs?**

The marketing budgets for specific categories and projects are not yet identified. The marketing budgets will include all tactics and costs associated with the projects.

**19. Does NYSEDA have utility data? If so, will it be shared with contractors upon task order award?**

NYSEDA does not have access to the utility usage data for utility customers unless they are already participating in a NYSEDA program that requires disclosure of such data and have explicitly given us permission to access their utility data. NYSEDA does not share that data for the purpose of marketing services directly to customers. NYSEDA does use both participant utility data and aggregated utility data in the evaluation of program design and effectiveness. In some cases, NYSEDA may share the statistics associated with aggregated data which gives typical but not specific participant results with contractors as needed. In no instance shall the firms be given permission to use any shared data for any purpose other than as directed by NYSEDA.

**20. Does NYSEDA have first party data on 1. Current participants 2. Past participants 3. Non-Participants? Will the marketing firm(s) be given access to that data for marketing purposes?**

NYSEDA's data varies by sector. In cases where NYSEDA has participant data, and has permission to market to those contacts, the data may be shared with the marketing firms, at

NYSERDA's discretion. In no instance shall the firms be given permission to use any shared data for any purpose other than as directed by NYSERDA.

**21. Has NYSERDA done any marketing research to support any of the 7 categories in the past 2 years? If so, could you briefly summarize what has been done?**

NYSERDA's evaluation and market insights teams are charged with coordinating and executing market research and program evaluation across all areas of the Authority. View the [Market Characterization and Design Chapter of the Clean Energy Fund](#) to read the initial research plan. Any research and insights gathered will be shared with NYSERDA Marketing and its marketing firms to help inform strategies and campaigns being developed.

**22. How is this similar to, and different from, the Economic Development and Growth Extension (EDGE) Program that was recently discontinued?**

The objective of the EDGE program was to provide regionally based outreach to New York State constituents to promote NYSERDA's programs and services. The objective of this RFQL is to establish a pool of marketing contractors that will provide full-service marketing support, including the development of integrated marketing campaigns, for various NYSERDA programs and initiatives. It does not cover outreach services.

**23. How are the service areas broken up?**

There are no service areas included in this RFQL, and marketing services are not regionally based. Marketing firms will be selected to provide support targeting audiences across New York State for following categories: Commercial/Industrial/Multifamily, Residential/Low-to-Moderate Income, Communities and Local Government, Innovation and Cleantech Entrepreneurs, Research and Policy, Strategic Communications, Clean Energy Competitions.

**24. Does NYSERDA have staff for personal outreach efforts to commercial customers in support of the marketing efforts or will it rely solely on the marketing firm efforts to reach the intended program goals?**

Some NYSERDA programs currently have contracted outreach services assistance promoting and implementing programs. It will vary from project-to-project.

**25. Will the marketing firm be given access to the NYSERDA website to create and/or optimize landing environments?**

In some cases, marketing firms will be providing content recommendations and revisions for the nysERDA.ny.gov website; however, all changes to the NYSERDA website will be made by NYSERDA staff.

**26. Will the marketing firm be given access to the NYSERDA website analytics to run reports and optimize campaigns?**

NYSERDA Marketing has access to analytics for all NYSEKDA webpages and can provide them to the firms, if necessary. In no instance shall the firms be given permission to use any shared data for any purpose other than as directed by NYSEKDA.

**27. Can you confirm if the NYSEKDA website is built on a CMS or hardcoded, and if it is built on a CMS, what CMS?**

The NYSEKDA website is built on Sitecore.

**28. In the list of marketing services that may be included for the various categories you include Public Relations. Can you please provide information about access to media outlets (including regional, local and trade) that the chosen agencies will have?**

Media needs will be determined on a project-by-project basis as part of the marketing plan development. As necessary, access to media outlets will be determined in coordination with the NYSEKDA Communications team.

**29. Does the SEM program relate only to manufacturers who are receiving investor-owned utilities?**

A company must pay the System Benefits Charge (SBC) to be eligible to participate in the SEM program.

**30. Is there any need for multicultural materials (Spanish materials)?**

In the past, NYSEKDA has made available Spanish versions of some collateral materials. There could potentially be a need for some materials to be translated to Spanish. That will be determined as part of the project work scoping process.