

OKLAHOMA PUBLIC EMPLOYEES RETIREMENT SYSTEM
Question and Answer Document
Design Services RFP
Solicitation Number: 15-274

Q1: From Page 9, Section 1, who is currently hosting your web site?

A: OPERS uses the LightCMS content management system, a product of NetSuite.

Q2: Do we need to design the site or only graphics for the site?

A: This engagement is limited to designing only graphical elements of the site, which may include renderings of redesigned home page and sub page layouts. It does not include actual site design.

Q3: From Page 11, Section 6, when was the last year a booklet cover was updated?

A: The original booklets were created approximately five years ago and have not been updated.

Q4: From Page 12, Section 7, will the same collateral materials be used at both seminars per year?

A: There are currently three financial and retirement planning seminars that have unique identities and purposes, but should have the appearance of being part of a cohesive series. Consequently, we are looking to create a presentation template, fact sheet template, email template, and banner/poster design for each of the three seminars.

Q5: From Page 12, Section 9, can you provide three examples of "OPERS Special Projects"?

A: On the 'Current Publications' page of the OPERS website (www.opers.ok.gov/publications), you will find links to two brochures entitled *Medicare Gap Benefit Option* and *2.5% Step-Up Election*. Those were two new plan provisions created under state law that created a special print publication. On our homepage, you will see five icons on the right side of the page that our designer created to help direct our members to high-traffic pages on our website.

Q6: Are you currently looking for any proposed redesign ideas on OPERS logo?

A: That is not a specific deliverable within this RFP, but we would be open to suggestions if the chosen provider had specific ideas within the course of the engagement.

Q7: Is OPERS open to tweaks or redesign of the main system logo?

A: See answer to Q6.

Q8: Who is responsible for the redesign of the OPERS website? Who is responsible for requirements gathering, site architecture, content development and coding?

A: See answers to Q1 and Q2.

Q9: From Page 9, Section 2, do you anticipate infographics being designed for the Comprehensive and Popular Annual Financial Reports? How many per report would you estimate?

A: OPERS is definitely interested in incorporating infographics within these reports, but it has not been thoroughly contemplated between our communications and finance divisions. The initial development of infographics would most likely be considered as a special project and priced separately from this proposal.

Q10: Will the two Popular Annual Financial Reports be mailed to OPERS members? Who is responsible for managing the mail house process/vendor?

A: Yes, they are mailed to members. Printing and mailing of communications to members is procured separately from design services. If the chosen provider of design services has an established relationship with a suitable printer and/or mail house, OPERS would be willing to consider including that firm in the solicitation of those services.

Q11: Do you anticipate infographics being designed for the two Popular Annual Financial Reports? How many per report would you estimate?

A: See answer to Q9.

Q12: From Page 11, Section 4, how many print newsletter and e-newsletter templates are being requested?

A: There would be three templates: one for the judicial plan and two for the OPERS plan (one template for active members and a second for retired members). The same would be true for e-newsletter templates.

Q13: In the creation of marketing and collateral materials:

- **How many presentation template designs?**
- **How many banner designs?**
- **How many poster designs?**
- **How many fact sheet template designs?**
- **How many email template designs?**

A: See the answer to Q4.

Q14: Can you please provide examples of special projects?

A: See the answer to Q5.

Q15: Within the Scope of Work, are you requesting three distinct designs for each deliverable? We would assume that the look and feel established in the “System identity package and overall design concept” phase would set the tone for the subsequent materials.

A: OPERS desires some level of choice within each deliverable. Consequently, we are looking at having multiple design ideas to consider within each assignment. It is anticipated that each project would begin with a discussion between OPERS and the provider on possible concepts before any design is executed, which may narrow the focus significantly and render the need for three options unnecessary on all projects.

Q16: If you are requesting three distinct designs for each deliverable, can you elaborate on why? We respect our partner’s budget and resources; doing three distinct designs for every deliverable would significantly increase the costs for each project.

A: As stated in the previous response, OPERS wishes to have options. We expect the respondents to review the examples provided on our website to determine what projects appear to be more involved assignments than others.

Q17: Do the “three rounds of feedback” apply to the one chosen design?

A: Yes, OPERS would not expect the provider to revise multiple design ideas concurrently.

Q18: “The Contractor will be expected to work with OPERS to agree on proofs, with the expectation there will be up to three rounds of corrections or adjustments before final proofs are produced and prepared for print or web publication.” Are the “three rounds of corrections or adjustments” separate from the “three rounds of feedback”? If we take “proof” to mean a printer’s proof, those three rounds of corrections or adjustments may incur expense, especially when printing offset. Can you clarify this?

A: No, corrections and feedback are part of the same process, not separate and in addition to one another. OPERS has typically reviewed and suggested corrections through the exchange of PDFs with the designer. Printer’s proofs are only necessary for final approval of the chosen design before printing.

Q19: If “corrections or adjustments” are in addition to/separate from the “three rounds of feedback,” can you please provide examples of “feedback” vs. “corrections or adjustments”?

A: See answer to Q18.

Q20: On Page 9, “Designing a small number of materials to serve as an identity package incorporating the URSJJ logo, including letterhead, envelopes, etc.,” What deliverables are included in the “etc.”?

A: You may disregard this. The primary deliverables are stated. If additional items are identified, they can be priced separately.

Q21: On Page 10, [with regard to photography for reports], we understand this to mean the Contractor is responsible for the photos of all Board members and System executive staff. Is that a correct interpretation?

A: Each year, the provider will arrange for a photographer to take headshots of new board members and executive staff, as well as a group photo of the executive staff. This is usually done in conjunction with a board meeting within our offices to assist in accommodating schedules and minimizing logistical concerns related to securing locations. That could change, but would be discussed with the provider in advance.

Q22: On Page 10, [with regard to OPERS and URSJJ CAFRs and PAFRs], are “design changes” different from “feedback” and/or “corrections or adjustments”? Why would four changes be included on this specific deliverable, while everything else is three? What constitutes a “design change”?

A: Similar to the answer of Q18, design changes and feedback are part of the same process. The design of the CAFRs and PAFRs is currently the most involved project from a design standpoint. Four sets of feedback and corresponding adjustments are not considered likely, but a possibility to ensure a desired outcome is reached.

Q23: On Page 10 [with regard to OPERS and URSJJ CAFRs and PAFRs], approximately how many “stylized charts/table/graphical elements” do you anticipate?

A: Each CAFR contains fewer than five such elements to be updated by the designer. The bulk of the work with CAFRs focuses on the design of the cover and section dividers. All tabular and chart design of the PAFRs is provided by the designer. Examples of these assignments have been made available on the OPERS Publications page (www.opers.ok.gov/publications).

Q24: On Page 11 [with regard to EssentialOPERS series], how often are there “changes to basic plan provisions”?

A: Plan provision changes are primarily a result of legislative action. The state legislature meets annually. Most legislative changes are relatively minor.

Q25: On Page 12 [with regard to Marketing and collateral materials to support the System’s Financial and Retirement Planning programs], can you elaborate on the rebrand of the series? What materials will have established looks and which are open to redesign?

A: Two of the three seminars are being renamed requiring a rebranding, and all three will be open to redesign. See answer to Q4 for more information.

Q26: What is your annual budget or budget range for this contract? Can you share examples of budgets in previous years?

A: The amount budgeted for design services should have no bearing on your response to this RFP. The successful bidder the last time these services were awarded came in with the following proposed fee structure:

FY 2011	\$16,855
FY 2012	\$11,150
FY 2013	\$11,695
FY 2014	\$11,815
FY 2015	\$11,985

Q27: Regarding the OPERS and URSJJ CAFRs, much of the material provided by the consultants and other financial vendors was in secured PDF format and was not to be "re-typeset" or re-formatted in terms of font style, size, etc. It was to be used as supplied. In other words, pages from these reports were placed in the design framework (with headers and footers) of annual reports "as is." Material supplied internally was then matched with the same font style, size and formatting. Is that how the material for the reports is currently handled, or how has that procedure changed?

A: The procedure is much the same. Pages are submitted to OPERS within an established format and do not have to be recreated outside of a small number of stylized tables and charts. The only slight change has been that headers and footers have been something provided by our current designer when the final document is assembled.

Q28: On page 10 of the RFP it states that photos of all Board members and System executive staff will be furnished by the System and that other photo needs will be "facilitated" (I assume that means scheduling / coordinating / directing) by the contractor - not a problem. Regarding payment – will the "System" be paying the photographer(s) directly?

A: Photography has been arranged and paid for through our current provider and not as a separate relationship. Each respondent should clarify how that cost is be handled within their proposal. See answer to Q21 for more information.

Q29: Do you have samples of Power Point presentations/formats that you have used in the past? How many PP templates including number of pages/frames for each are you requesting?

A: Current presentations have used standard templates within PowerPoint. See Q4 for more information.

Q30: How many fact sheet templates in MS word format?

A: See answer to Q4.

Q31: How many different banner and poster designs?

A: See answer to Q4.

Q32: On page 2 of the RPF, item A.2.4 it states: "In addition to a hard copy submittal, the bidder will also be required to submit an electronic copy. Electronic responses must be submitted in the identical format contained in the solicitation (for example Microsoft Word, Microsoft Excel, but not Adobe PDF)." I am confused, because the RFP is in PDF format. I think I understand that you do not want the formatting of pages 15, 16, 17, and 18 to change. So if the formatting/appearance isn't changed, we can't give the electronic version of those completed documents back to you as a PDF?

A: A hard copy of the proposal is acceptable. Since we did not make this RFP available in Word, Excel, or other fillable format, you may disregard the language prohibiting a PDF as being unacceptable.

Q33: Do you want the electronic version of the submittal to be on CD or USB flash drive?

A: A PDF is preferable to CD or USB, but either of those would also be acceptable.