

OKLAHOMA PUBLIC EMPLOYEES RETIREMENT SYSTEM
Question and Answer Document
Design Services RFP
Solicitation Number: 20-223

What was the design services budget for these products last year, or what is the expected budget range?

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 2016	\$14,175
FY 2017	\$10,825
FY 2018	\$11,175
FY 2019	\$11,522
FY 2020	\$11,877

Is there an incumbent, and if so, whom?

A: University of Oklahoma Printing Services

Please clarify options for the electronic submittal portion of this RFP.

A: A PDF response to the RFP is acceptable. The OPERS office building is closed to the public, so electronic submission is preferable.

Does OPERS wish to see any printed materials bids? Some of us vendors may have competitive pricing that might be useful for your needs.

A: Printing and mailing of communications to members is procured separately from design services. Let the Communications Manager know if you would like to be added to the list of vendors contacted in the solicitation of those services.

Many documents APPEAR to have duplicate (verbatim) content with just changes to the cover and some limited sections. Will this be the case?

A: Projects will vary. For example, the Retirement Coordinator Manual is created in a Word document, but the designer is only responsible for the cover design. We combine the PDF of the cover with the PDF of the manual.

Many of the existing documents appear to be produced in Microsoft Office - Word, is this the expected application to deliver these? Can we use Adobe Creative Suite?

A: Many of our publications (manual, handbooks) are created in Word, and the cover design is combined with a PDF. You are not limited to creating designs in Word.

Do we provide three concepts per project or per publication (I.E. - there are 4 Handbooks. Do we develop 3 concepts per Handbook, or 3 concepts for all the handbooks?)

A: Three concepts per project. For example, you would provide three concepts for the handbooks and after narrowing down to one concept you would design four covers in the concept theme.

Annual Financial Reports, Newsletters, OPERS and URSJJ Handbooks, & Retirement Coordinator Manual Covers - When providing three design concepts for each of these projects, how finished would you like these concepts to be when present? Can these concepts be delivered in the form of a mood board with one or two sample pages for each concept? Do you have examples of what you have received in the past that might help us deliver what you are looking for?

A: Each project would begin with a discussion between OPERS and the provider on possible concepts before any design is executed. The concepts should be a first draft of the proposed project. There will be revisions when a concept is chosen, so the concepts are not expected to be the final product.

Is the RFP for this project being issued under the statewide vendor pre-qualification contract SW0135? [Info: <https://www.ok.gov/dcs/solicit/app/solicitationDetail.php?conID=3725>]

A: Yes.

In order to meet state and federal accessibility requirements, all web-ready PDF files published by an Oklahoma state agency must be remediated/tested for accessibility for use by citizens with disabilities. Will this accessibility compliance activity be conducted by OPERS staff/contractors or is the design firm responsible for ensuring compliance? [Info: <https://omes.ok.gov/pages/accessibility>]

A: The designer should comply with accessibility on projects where they create the entire end product (newsletters, CAFRs, PAFRs). OPERS will conduct accessibility checks on items that the designer created, but not the contents (seminar handbooks, Retirement Coordinator Manual).

How closely does OPERS want the design firm to align its creative work with the State of Oklahoma's new branding visuals? [Info: <https://branding.ok.gov/visual-identity/>]

A: OPERS and the design firm can discuss the state branding as we proceed on specific projects. The branding conversation has stalled at this time.

The RFP states that OPERS plans to award the projects by May 15, 2020, but the contract start date is six weeks later, on July 1, 2020. Is the OPERS staff amenable to holding design discussions with the design firm before July 1st?

A: OPERS is not opposed to having discussions. The time between awarding and beginning the contract was to ensure there was enough time to finalize the contract and work out any other details.

On page 7 of the RFP, item #6 under Quote Submittal Format requests that the design firm provide a short list of clients with contact information. During the prequalification process for statewide contract SW0135, our firm was required by OMES to submit detailed quality-of-work rating surveys from clients (including contact information). Would these rating surveys be acceptable to OPERS for meeting this submission requirement?

A: OPERS would like to see examples of your work. You can submit these surveys and their contact information along with your response.

CAFR and PAFR Reports

What percentage of the textual content of the CAFR and PAFR is anticipated to be delivered to the design firm as hardcopy rather than digitally?

A: All of the text in the reports will be provided in Word, PDF or Excel files. There are awards and signatures that need to be scanned.

Will the original table and chart data for the CAFR and PAFR be available in digital form (i.e. Excel spreadsheets/charts, Word tables, etc.)?

A: Yes.

Regarding photographs of OPERS staff and trustees:

a. Can photography sessions be arranged before/after a scheduled board meeting of the OPERS trustees?

b. Are photographs required each year only for new staff and trustees, or for all trustees and selected staff?

A: Board and staff photography is scheduled for the October board meeting, which is held on the third Thursday of October. A group picture of key staff and headshots of any new board and staff pictures are taken each year, so it isn't a new picture of everyone every year.

On page 3 of the RFP, it is stated that "Other photographic assignments may be identified." Can you provide some examples of the kind of additional assignments that might be requested?

A: It could be that the design concept has a need for original photography. For example, the FY2013 CAFR used photography of our members on the cover and divider pages.

When providing hard copy proofs, how many copies will you need, and will these need to be printed in color?

A: The reports are approved from a PDF proof. There is no need to provide hard copy proofs.

EssentialOPERS Series

Based on experience, how often are minor content changes needed for the *EssentialOPERS* summary sheets?

A: Annually, these publications are updated after the legislative session if there are any changes to plan provisions. The last update was in July of 2018.

Will the *EssentialOPERS* summaries be distributed in both digital and print versions?

A: Yes. They are posted on the website, usually printed and mailed along with the Summer Newsletter, and generally distributed at our seminars.

Newsletters

Please indicate which of the following accurately describes the requirement for three newsletter design concepts?

a. One concept for each newsletter audience (total of 3 concepts).

b. Three concepts, with one selected for adaptation to all three newsletter audiences.

c. Three design concepts for each newsletter audience (total of 9 concepts), with one concept being selected from each group of three for each newsletter.

A: Option B - There are three newsletters (Active, Retired, and URSJJ), but the design concept (look and feel, font) applies to all of the newsletters and a different color pallet is applied to each version. After the newsletter is designed for the first newsletter, it will be replicated in subsequent newsletters. For each edition of the newsletter there will be some content that will be the same, but most will be unique to each version. This will vary.

OPERS and URSJJ Handbooks

What is the anticipated production schedule for each of the handbooks, and is it the same schedule from year-to-year?

A: The handbooks have been updated sporadically. We generally direct members to the *Essential/OPERS* since it is a condensed version. The last update to the handbooks was in 2014. An update is scheduled for later this year, and hopefully every other year after that.

Are there a total of three design concepts required (one of which will be selected for adaptation to all five handbooks), or do three design concepts have to be developed for each handbook?

A: Three design concepts which would then be applied to each of the handbooks.

The RFP states that seminar booklet content is updated annually, but the booklet covers are updated every 2-3 years. For purposes of completing the "Proposed Fee" table on page 9 of the RFP:

a. Which fiscal years in the Proposed Fee table will require the development of three design concepts for each booklet?

b. Which fiscal years in the Proposed Fee table will require development of a new cover for each booklet?

A: The last design of the seminar handbook covers was completed in 2015. I anticipate a new set of cover designs in FY 2021 and possibly again in FY2024.

Based on experience, are annual content updates to the seminar booklets minimal, moderate, or extensive?

A: Annual updates to seminar booklets are done by OPERS staff in a Word document. For most years, the updates are moderate.