



**New York Wine & Grape Foundation  
Domestic RFP Question & Answer Document**

**Budget Update: January 5, 2024**

NYWGF would like to amend the Domestic Marketing RFP budget to include activities related to our Sustainable Winegrowing program. NYWGF has recently been awarded a grant that will provide up to \$35,000 in additional funds to support the promotion of wines made from sustainable grapes through September 2025. The activities (deliverables) will include the following:

- Trade/Media tour(s) of key winegrowing regions
- Trade/Media seminars (in-person or virtual)
- Consumer seminars (in-person or virtual)
- Conceptualize and launch 'New York Sustainable Wine Week'

The successful bidder for the RFP will be expected to integrate these deliverables into their annual New York Wines marketing activity workplan.

**Please see below for a list of questions and answers regarding the domestic marketing consultant budget, scope of services, strategy development, administration, and measurement of outcomes. Where possible, NYWGF consolidated similar questions from multiple consultants.**

**Budget**

**Our firm works on a monthly retainer model as opposed to day rates or fees for each deliverable. Is it acceptable to provide a monthly retainer fee as our proposed budget?**

Yes, a monthly fee model is preferred. All deliverables outlined in our final agreement will be expected and measured against agreed upon KPIs.

**The RFP states “inclusive of activities and consultant fees” – does this mean that the budget includes the cost of tactics and events that are conducted (e.g. – a trade/media event with hotels, travel, etc. for attendees)**

Yes, the stated budget would be inclusive of all costs – including travel and lodging for proposed activities. If necessary, additional costs associated with the program that may occur during the program



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year must be submitted in writing for approval prior to incurring the expense. Regarding any activities done in partnership with regional associations, there would be an additional budget to cover hard costs. The role of the consultant in those instances will most likely be focused on PR/marketing, trade/media relations, and event logistics.

**Does the stated project budget include paid media/advertising? If not, can you share your budget for paid activities?**

Yes, the stated project budget is inclusive of all activities, including paid advertising.

**Will there be additional budget for tactics and events from participating wineries and/or in-kind donations from local vendors (e.g. – hotels, restaurants) to supplement the budget?**

Wineries do provide wine samples at no cost and often we are able to leverage relationships with wineries or restaurants for low-cost space. No additional cash support has been identified at this time (please see note above regarding sustainability funding and support from regional marketing partners). However, this may change during the year if additional grant opportunities become available.

**Could you please elaborate on the level of detail expected in terms of budget breakdown for all activities?**

Types of activities and estimated budgets should be included; however, we understand that these will not be confirmed until the partnership is established and the final list of events is agreed upon. The agency fee for activity management should be included.

**You've stated, "For all financial aspects of the program, we have to follow the regulations within grants on eligible and ineligible use of funds and other limitations." Does this also require reporting on the use of funds? Who is responsible for the accountability report to the grant givers?**

While we expect the successful consultant to work in partnership with NYWGF staff to keep regular and accurate budget updates, NYWGF is ultimately responsible for reporting to funders on the specific use of funds and answering any compliance questions that should arise.

**You've stated, "For all financial aspects of the program, we have to follow the regulations within grants on eligible and ineligible use of funds and other limitations." Can you share some examples of how this will need to be considered for programming recommendations? Are there any stipulations**



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### **on how funds can be used?**

There are currently no stipulations on how funds can be used.

**Under “Engage Trade & Media Influencers” the RFP requests that programming include engagement tactics such as familiarization trips, online events and webinars, contests, special promotions, regional awareness campaigns, or other tactics that bring qualified buyers (trade & consumers), and media representatives to New York’s wine regions. Will these tactics, and the press trip mentioned, be included in a separate budget?**

No. All proposed activities must fall within the stated budget scope of \$170,000 initially stated, plus the \$35,000 in additional funds noted above that must be focused on promoting wines made from sustainably grown grapes.

### **Scope of Services**

**How in-depth are the services required for each participating winery? For example – is it akin to servicing XX participating winery clients? Or more cursory interactions?**

NYWGF is the client. The consultant in this role traditionally drafts correspondence with activity specifics for wineries which NYWGF staff then sends out. Follow up questions, next steps for logistics/ shipping details, and activity execution are then handled by the consultant with a small amount of NYWGF staff support.

**Because the engagement would involve working on behalf of both NYWGF and individual winery participants, can you rank which of those entities would take priority?**

The successful bidder would only be working on behalf of NYWGF, and our Tier 3 Member wineries as noted above.

**How much time do you expect the selected firm to allot toward supporting individual winery participants, compared to time spent supporting NYWGF overall?**

In the past we have been successful in selecting activities that both a) promote the overall New York Wines brand and b) support individual winery marketing efforts. For example, the *New York Region Guide* on Wine Folly does an excellent job at delivering high-level New York Wines marketing and educational messages to consumers, trade, and media. However, it also provides an opportunity for



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individual wineries to claim a profile and build it out as robustly as they wish. The winery profiles then direct an audience to their website to continue the path of engagement. We are looking for innovative ideas such as this that are effective and efficient to serve our purposes.

### **How many individual winery participants do you expect to require marketing and communications support throughout the course of the engagement?**

Approximately 50 Tier 3 Member wineries will engage in this program in FY 24-25.

### **How are the needs of wineries in the program ranked/assessed? (i.e. would the firm support wineries of a certain size/revenue?)**

All wineries participating in Tier 3 NYWGF Membership must be afforded the opportunity to participate in at least one (1) or more marketing activity each Fiscal Year. NYWGF staff will provide guidance as to the appropriate types of activities for each winery based on their target audience (consumers and/or trade), distribution and preferred sales channel(s).

### **Who are the regional marketing partner associations – will this incumbent also work with Long Island and Finger Lakes regions?**

Yet to be confirmed but we anticipate working with the *Finger Lakes Wine Alliance* and the *Long Island Wine Council*. We tentatively plan to identify one (1) activity/event from each to include in the annual workplan for the successful consultant. Please consider this when proposing your monthly management fee. There will be an additional budget for the implementation of the project from each partner (i.e., hard costs associated with travel, advertising, shipping, event space, etc.)

### **For the first activity of establishing the activity selection process, are you looking for us to develop a system through which entities can submit the proposals officially or something more similar to a vetting system.**

NYWGF receives a wide variety of marketing ideas and proposals every year – in addition to those we plan with our current marketing consultant. These ideas come in through vendors, wineries, and interested industry related entities alike. We would like to establish a process for vetting proposals like the process we use for vetting our funded research. For example, [NWYGF's Research Committee surveys the industry each year](#) as to the top grape research related topics. When a research proposal comes into the committee, the proposal can be vetted against the priorities set forth by the industry, in addition to the projected impact of the project.



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**For the Trade Servicing and Public Relations – you note that the agency would be providing services for the NYWGF as a whole, of course, but also to other wineries individually. Can you give us more context on individual consulting?**

As noted above, NYWGF is the client. The consultant in this role traditionally drafts correspondence with activity specifics for wineries which NYWGF staff then send out. Follow up questions, next steps for logistics or shipping details, and activity execution are then handled by the consultant with NYWGF staff support. There is no traditional marketing consulting necessary to individual wineries for anything outside of our schedule of events. Wineries may have questions related to their participation in our events (i.e., who is the best spokesperson for this audience? What wines should I feature? What kind of stories will the audience be most interested in? etc.) however that should be the extent of most of the questions.

**When building trips to the regions, what is the expectation?**

The consultant is expected to have connections to Trade (especially buyers) and Media best suited for the trip or activities being proposed to NYWGF.

**Are we expected to bring individual participants?**

Yes, the consultant is expected to identify individual participants suitable for each activation. The NYWGF budget should be used for travel and accommodation.

**Are we expected to collaborate with existing programs?**

Ideally NYWGF activities will not compete with other regional programs and, where appropriate, may collaborate or coordinate with them to maximize impact on our mutual goals.

**To that end, do you have an official program list of larger activities already taking place?**

The domestic marketing activity schedule is developed annually by NYWGF and domestic marketing consultant. NYWGF has a list of traditional activity “types”, but no programs or activities run year after year. We are open to changing this model.

**In the past you supported a Wine Folly Guide, do you have other examples of activities done with Guild Somm, etc. and their results?**



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The GuildSomm E-Learning Course is an interactive, multi-media course written, designed, and fact-checked by the GuildSomm team and permanently published to the GuildSomm site, available to all GuildSomm members.

**Does the educational bullet also include potential partnerships with publications such as SevenFifty or Wine Enthusiast?**

Yes.

### Strategic Direction

**Is NYWGF planning on surveying industry members and when can we expect to see that?**

Yes, we are. The results of that survey will not be available until February/March 2024. While the results can help guide future decision making, they will not be available before the proposal is due. Proposals should provide suggestions for strategies and activities based on your knowledge of the New York Wine industry backed by your experience with what has worked to increase brand awareness and sales for previous clients.

**Is there any update about plans for a New York Wine Month? Or Week?**

While there are no concrete plans for New York wine month or week currently, NYWGF has committed to creating a *New York Sustainable Wine Week* – which would include a series of activities featuring sustainably grown wines. Details will be up to the discretion of our staff team and the successful bidder on this RFP.

**How much do you expect the focus to be on advertising and paid marketing (i.e. mailers, ads, brochures, etc.) vs. earned media and public relations (i.e. events, media coverage, etc.)?**

In the past NYWGF has done minimal paid advertising but is open to recommendations based on a sound logic model presented to us by the successful bidder. With a limited budget, NYWGF has relied primarily on earned media in the past. One point for the successful bidder to recognize is the complexity of a “call to action” with paid media. Though work is being done on the [newyorkwines.org](http://newyorkwines.org) website to ensure relevance, it is currently not in an ideal state to receive an influx of trade, media, and consumer queries seeking to buy wines or tour New York wine country.



**The RFP includes the list of the existing NYWGF target U.S. geographies. Do you anticipate expanding that list?**

With a limited budget, NYWGF wants to make sure that we effectively execute in the industry's desired target markets first and meet KPIs/goals before expanding. The current target markets may change with additional industry feedback, especially our Tier 3 member wineries. We expect that information prior to the start of the program year (April 1, 2024).

**Who do you consider your biggest competitor(s)?**

Our main competitors are large wine regions with large marketing budgets including France, Italy, and California. Also, wine regions can promote a lower price point. It is incumbent upon NYWGF and the successful bidder to ensure that the New York Wines' unique value propositions are clearly articulated in promotional activities and that we are strategic when connecting with audiences who will understand that value proposition.

**Are there peers or other organizations whose communications and marketing efforts you admire?**

- Austria <https://www.austrianwine.com/>
- Burgundy <https://www.bourgogne-wines.com/>
- Oregon <https://www.oregonwine.org/>
- California <https://discovercaliforniawines.com/>
- Wine Folly <https://winefolly.com/>
- Lodi Rules (Sustainability) <https://www.lodirules.org/Sustainability>
- Washington State Wine Commission <https://www.washingtonwine.org/>

**Can you clarify the "strategic activity selection process" detailed in the Scope of Services? For example, would NYWGF participants need to run all their promotional activities past the selected firm for approval?**

NYWGF would like to develop a process (which may include surveys, regular meetings, and/or creating an official advisory committee) by which industry members can submit their ideas for *NYWGF funded activities* designed to amplify brand awareness and support our Tier 3 Members goals (Tier 3 Members are wineries that choose to participate in our domestic marketing program).

Each winery maintains their own separate marketing budget and can engage in any activity they like without consulting NYWGF.



**What is the sales channel mix of participating wineries? (e.g. – hospitality / tasting room; wine club; online; wholesale (on-premise); wholesale (off-premise); export)?**

Most participating Tier 3 Member wineries sell a significant amount of wine through their tasting rooms and most also have some distribution mechanism (either via self-distribution or a third-party.) NYWGF keeps an updated list of all the states in which our winery participants distribute. Over 50% of the wineries in our domestic marketing program are also active in our export program. International marketing is not the responsibility of this consultant.

**What is the targeted mix of trade / buyer, media, consumer activities?**

All of the above – as many touchpoints between the wineries, and consumers and on/off-premise trade that can be utilized to increase sales to their preferred audience(s) based on their own marketing goals. This is likely to change every year depending on stated industry needs and the recommendation of our successful consultant partner. For the first year, we may need to proceed *without* the comprehensive input that we would like to gather in the future. For 2024-25 we will more heavily rely on the consultant's recommendations after learning more about our program and what has historically worked for New York Wines in the past.

**Will the new consultant be pursuing the current marketing strategy or crafting an entirely new one?**

We expect 2024-25 will be a transition year for NYWGF and the incoming partner in which we will need to continue with the current marketing strategy to some extent, while finalizing a new process by which we create and execute our annual marketing strategy plan.

**Is the stated geography for 2024 marketing initiatives set in stone, or is there leeway should we feel that a more focused effort in key wine markets might yield greater returns?**

Please see the answer above. While key target markets are fairly well established for FY 24-25, we are looking forward to working with the successful consultant and actively engaging with leaders from the industry to evolve target markets and our strategies within them in the future.

**Can you share the industry feedback received from regional marketing partners that informed the decision to shift focus to consumer marketing?**





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While our *sole* focus is not on consumer marketing, we would like to *increase* the number of activities designed to connect with consumers, in addition to efforts focused on trade and media influencers. Feedback was received from Tier 3 member wineries in April 2023 indicating that 52% are most interested in reaching both the trade and consumer audience; 10% just consumers; and 38% preferred to focus on marketing to on and off-premise trade only based on each's own strategic objectives.

### **Can you share the wineries participating in the Domestic Marketing program, or the number of wineries that are part of the program?**

There are currently 41 Tier 3 Member wineries – 26 from the Finger Lakes, 5 from the Hudson Valley, 8 from Long Island, and 1 each from Lake Erie and the Niagara Escarpment. We hope that the number slightly increases in FY 24. To elaborate, each year wineries select their NYWGF membership tier based on the level of service they would like to receive. For example, Tier 1 Membership provides basic support and information, Tier 2 Membership provides expanded educational and business development services, and *Tier 3 Membership provides enhanced marketing and promotion services*. NYWGF services are primarily used to supplement a winery's marketing efforts, not act as their primary effort.

### **There was a substantial amount of activity included in the marketing newsletter for the Tier 3 wineries. Does this reflect the monthly level of opportunities that you want identified?**

Ideally, we would like to continue this level of marketing support for our Tier 3 Wineries.

### **Does anyone else help to find winery opportunities?**

Marketing ideas, opportunities, and proposals come to NYWGF by companies and are sent in by Industry Members on a regular basis. This is one of the main reasons we would like to work with our incoming consultant on a transparent, efficient, and responsive process by which we vet these opportunities.

## **Administration & Measurement**

### **Who will be the main spokesperson/people for this effort?**

New York Wines does not have one spokesperson for its brand or overall marketing efforts. We utilize multiple wine educators, wine writers, trade, and representatives from individual wineries to showcase our key messages. Finding those brand ambassadors and partners will be an important job of the



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successful bidder.

The main spokesperson for the New York Wine & Grape Foundation is Sam Filler, Executive Director.

The staff leads for this initiative are Valerie Venezia-Ross, Director of Programs & Marketing and Jennifer Cooper, Membership & Events Manager.

### **Are KPIs set or how will success be measured for marketing activities?**

NYWGF staff and the successful consultant will develop these together in advance of each program year. They are then presented to the NYWGF Board and monitored annually for performance.

### **Can you confirm that this is a new role for NYWGF? We got that impression from reading the RFP but wanted to confirm.**

NYWGF does have a marketing firm executing our (primarily trade & media) focused initiatives. While this is working well, our industry members, regional associations, and other marketing partners have indicated that they would like NYWGF to take an increased role in consumer marketing and promotion of wine tourism.

### **Are specific goals/sales goals for the individual winery participants available?**

No. However, it will be important that NYWGF track high level KPIs for each marketing activity we support to illustrate success to Tier 3 Members and the Board of Directors (i.e., Increased aggregate sales year over year, increased website traffic, # of participants at events, media coverage, etc.)

### **Can you share an example of the type of monthly reporting you are looking for?**

[Please see example of report format here.](#)

### **How will success be measured? Are there goals identified? Is there a plan for pre- and post-testing?**

It will be important that NYWGF track high level KPIs for each marketing activity we support to illustrate success to Tier 3 Members and the Board of Directors (i.e., Increased aggregate sales year over year, increased website traffic, # of participants at events, media coverage, etc.) These KPIs will be proposed by the successful consultant at the beginning of each Fiscal Year and reviewed/approved by NYWGF staff. While there is a survey process to gauge participant and guest feedback on our activities, this



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could be an area of improvement for the future.

### **Are the four points of judging weighted equally?**

Yes. The proposals are scored by a committee made up of NYWGF staff, Board Members, and Industry Marketing Partners. Each criterion is scored from 1 to 10 and the finalists are ranked in order of total score. The committee will choose the top 3-4 finalists to interview during the week of February 5, 2024.