



Edwin M. Lee, Mayor

Trent Rhorer, Executive Director

MEMORANDUM

**TO:** HUMAN SERVICES COMMISSION

**THROUGH:** TRENT RHORER, EXECUTIVE DIRECTOR

**FROM:** NOELLE SIMMONS, DEPUTY DIRECTOR  
JOHN TSUTAKAWA, DIRECTOR OF CONTRACTS *JuJ*

**DATE:** DECEMBER 21, 2017

**SUBJECT:** NEW CONTRACT: JOHN SNOW, INC. (FOR-PROFIT) TO PROVIDE CALFRESH MARKETING SERVICES

<b>CONTRACT TERM:</b>	<u>New</u>	<u>Contingency</u>	<u>Total</u>		
	01/1/18- 12/31/18				
<b>CONTRACT AMOUNT:</b>	\$50,000	\$5,000		\$55,000	
<b>ANNUAL AMOUNT:</b>	<u>FY 17/18</u>				
	\$50,000				
<b>FUNDING SOURCE:</b>	<u>County</u>	<u>State</u>	<u>Federal</u>	<u>Contingency</u>	<u>Total</u>
<b>FUNDING:</b>	\$50,000	\$0	\$0	\$5,000	\$55,000
<b>PERCENTAGE:</b>	100%	0%	0%		100%

The San Francisco Human Services Agency (SFHSA) requests authorization to enter into a contract agreement with John Snow, Inc. for the period of January 1, 2018 to December 31, 2018 in the amount of \$50,000 plus a 10% contingency of \$5,000 for a not to exceed amount of \$55,000. The purpose of the contract is to develop social marketing approaches that can be used by community-based partners and the SFHSA in an effort to increase enrollment in CalFresh.

Background

In San Francisco, only one in two persons eligible for CalFresh is receiving it. Approximately 50,000 individuals likely qualify for CalFresh but are not on aid. SFHSA is launching a significant CalFresh enrollment effort. SFHSA is out-stationing CalFresh/Medi-Cal eligibility workers to take applications in the offices of community based organizations and public agencies, conduct enrollment events in the community, follow-up with the community partners on applications submitted, contract with a third party vendor to reach out to potential applicants by phone and mail,

help them understand the benefits provided by the CalFresh program, and assist them in the application process. This contract expands these efforts through assorted number of social media platforms focusing on two target populations that SFHSA will define based on the vendor's initial research findings.

**Services to be Provided**

The contractor will use a community-based social marketing approach to promote enrollment in CalFresh and Medi-Cal for low-income San Francisco residents. The approach includes the development of campaign materials, videos, communication resources, and best practices that can be used by community-based organization (CBO) partners and the San Francisco Human Services Agency (SFHSA) to leverage their digital communities and broaden the reach of CalFresh messaging efforts. The contractor will develop, test, and measure message content to help CBOs and SFHSA refine campaign efforts towards target audiences

For more specific information regarding the services to be provided to the target population, please refer to the attached Appendix A.

**Selection**

Contractor was selected through IB (Informal Bid) #709, which was issued in November 2016.

**Funding**

This contract will be funded entirely through City and County funds.

**Attachments**

Appendix A – Services to be Provided

Appendix B – Calculation of Charges

**Appendix A: Services to be Provided**  
**Contractor: John Snow Inc.**  
**Term: 1/1/18-12/31/18**

**I. Purpose of Contract**

The purpose of this Contract is the design and implementation of a community-based social marketing approach to promote the CalFresh program among San Francisco residents.

**II. Definitions**

CalFresh	CalFresh Division of the San Francisco Human Services Agency
CBO	Community-Based Organization
JSI	John Snow, Inc. (Contractor)
SFHSA	San Francisco Human Services Agency

SNAP = Supplemental Nutrition Assistance Program (known as CalFresh in CA)

**III. Target Population**

The target population is low income persons in San Francisco who are likely to be eligible for CalFresh with a specific focus on two target populations. This will include persons who are already receiving other benefits like Medi-Cal.

**IV. Description of Services**

Based on formative research and community feedback, John Snow Inc. (JSI) will be responsible for developing a social media marketing campaign materials that can be used by community-based organization (CBO) partners and the Human Services Agency (SFHSA) to promote CalFresh among two priority populations identified by SFHSA. Campaign material will be accompanied by communication resources and best practices that will help CBO partners and SFHSA leverage their digital communities and broaden the reach of CalFresh messaging.

Environmental Scan and Key Informant Reviews:

JSI will conduct a review of issue briefs and other available literature for two target audiences identified by SFHSA. Areas of research will include social services outreach, barriers to accessing social services including stigma, and information on possible “assisters,” or others in the household or network who would facilitate enrollment (e.g., adult children of seniors). JSI will also review data from SFHSA and partners on eligible residents of San Francisco and any previous documentation of barriers to enrollment.

JSI will then conduct a series of key informant interviews with the following participants: 6-to-8 potential clients or supporting figures (e.g., caregivers for seniors) per target audience; 4 interviews with agencies or community-based organizations that serve the identified target

populations (e.g., financial aid officers, senior centers); and 2 interviews with SFHSA staff. JSI will summarize the interview findings and the environmental scan into a Formative Research Summary Report.

#### Message Development and Testing:

JSI will develop message content and creative elements for testing, sharing draft messages and creative concepts with SFHSA for input. JSI will partner with video production firm PlusM Productions to incorporate new or repurposed video material. JSI will also produce two to three mood boards (i.e., campaign mockups) per audience representing campaign concepts, themes, and direction through a combination of color, font, and graphic approaches.

JSI will conduct focus groups using mood boards and messaging (which may include verbiage, pictures, and vignettes/clips). Two focus groups will be conducted per target audience, each consisting of six to ten participants. JSI will work with CBOs and SFHSA to recruit participants, identify a meeting location, and will provide incentives in the form of \$40 gift cards.

#### Campaign Development, Refinement, and Finalization:

JSI will develop social marketing campaigns for both intended audiences. As a part of this process, JSI will work with PlusM to develop any video content including writing narratives or subtitles for videos, if needed. For language-specific messaging, JSI will develop Spanish language content in-house and will work with CBOs to develop and translate any messaging for Chinese language content. JSI will then assess the appeal/impact of content by developing and conducting an A/B Testing model through paid content on social media channels and refine campaigns based on testing results.

#### Editorial Calendars and Ad Buying Recommendations

JSI will develop a year-long editorial calendar and ad buying recommendations for SFHSA and CBOs. The calendar will align with events and holidays that are relevant to the intended audiences. To supplement these recommendations, JSI will also prepare social media best practices and instructions on tracking metrics and evaluating social media content/advertisements. Best practices will include lessons learned from JSI's A/B testing efforts as well as industry best practices.

### **DELIVERABLES**

#### **1) Task 1- Environmental Scan and Key Informant Interviews (March 31 completion date):**

- Summary report detailing methodology for literature review, interviewee selection, interview guide, and analysis approach; key barriers to enrollment identified in the literature review; findings regarding social media access and use; key themes in interviews and staff perspectives; and recommendations on messaging approaches and creative content.

#### **2) Task 2- Message Development (April 30 completion date):**

- Mood boards illustrating 2-3 campaign concepts for each audience.

- Drafts of several messaging approaches for each audience.
- Presentation and written meeting summary of input from SFHSA and CBOS

**3) Task 3- Message Testing (June 30 completion date)**

- 1-2 focus groups conducted per target audience (up to 4 total), with 6-10 participants per group
- Focus group summary document detailing the results of all focus groups in a summary document that describes focus group participants and their responses to campaign concepts including areas of consensus and diverging opinions.

**4) Task 4- Campaign Development, Refinement, and Finalization (August 31 completion date)**

- Overview of A/B Testing model
- Placement of 4 A/B test advertisements set per audience and analysis of results
- Final campaign materials including:
  - An overview of the campaign and guide for implementation based on formative research
  - Three months of social media content (roughly 15 posts for CBOs to use on their own channels)
  - Three social media advertisements

**5) Task 5- Editorial Calendars (September 28 completion date):**

- Editorial calendars for each campaign and a set of ad buying recommendations.
- Social media best practices and evaluation guidance as a reference for SFHSA and CBO partners.

**V. Reporting Requirements**

- Contractor will provide a **monthly** report of activities, adhering to the timetable provided in Appendix B. Contractor will enter the monthly metrics in the CARBON database by the 15<sup>th</sup> of the following month.
- Contractor will provide Ad Hoc reports as required by the Department.
- For assistance with reporting requirements or submission of reports, contact:

David.Kashani@sfgov.org  
Contract Manager, Office of Contract Management

or

Tiana.Wertheim@sfgov.org  
Program Manager, CalFresh

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**Appendix B – Calculation of Charges**  
**John Snow Inc.**  
**CalFresh Marketing**  
**January 1, 2018 – December 30, 2018**

**Project Timeline:**

<b>Task 1: Formative Research Summary (March 31 completion date)</b>					
<b>Staff</b>	<b>Hours</b>	<b>Rate</b>	<b>Total Labor Costs</b>	<b>Non-Labor Costs (e.g., Media Placements, Materials Production)</b>	<b>Deliverable Total</b>
Project Director	24	\$102	\$2,448	<b>\$0</b>	<b>\$7,672</b>
Social Media/Digital Advertising Specialist	32	\$82	\$2,624		
Outreach Manager	40	\$65	\$2,600		
<b>Task 2: Mood Boards and Presentation to SFHSA and CBOs (April 30 completion date)</b>					
Project Director	40	\$102	\$4,080	<b>\$0</b>	<b>\$12,120</b>
Social Media/Digital Advertising Specialist	60	\$82	\$4,920		
Outreach Manager	48	\$65	\$3,120		
<b>Task 3: Digital and Transit Advertising (June 30 completion date)</b>					
Project Director	16	\$102	\$1,632	<b>\$2,680</b>	<b>\$10,192</b>
Social Media/Digital Advertising Specialist	40	\$82	\$3,280		
Outreach Manager	40	\$65	\$2,600		
<b>Task 4: A/B Testing Model, A/B Ads and Summary, and Final Campaign (August 31 completion date)</b>					
Project Director	40	\$102	\$4,080	<b>\$2,000</b>	<b>\$13,272</b>
Social Media/Digital Advertising Specialist	56	\$82	\$4,592		
Outreach Manager	40	\$65	\$2,600		

<b>Task 5: Editorial Calendars (September 28 completion date)</b>					
<b>Staff</b>	<b>Hours</b>	<b>Rate</b>	<b>Total Labor Costs</b>	<b>Non-Labor Costs (e.g., Media Placements, Materials Production)</b>	<b>Deliverable Total</b>
Project Director	20	\$102	\$2,040	<b>\$0</b>	<b>\$6,744</b>
Social Media/Digital Advertising Specialist	32	\$82	\$2,624		
Outreach Manager	32	\$65	\$2,080		

<b>Cost Summary:</b>	
<b>Cost Description</b>	<b>Total Cost</b>
Labor	\$45,320
Non-Labor	
- Media Placements	\$2,000
- Focus Group Incentives	\$1,600
-Focus Group Supplies	\$1,080
Subtotal	\$50,000
Contingency (10%)	\$5,000
<b>Total</b>	<b>\$55,000</b>

<b>Staff Hours/FTE Summary:</b>		
<b>Staff</b>	<b>Hours</b>	<b>FTE</b>
Project Director	140	0.06
Social Media/Digital Advertising Specialist	220	0.11
Outreach Manager	200	0.10
<b>Total</b>	<b>560</b>	<b>0.27</b>

## Appendix C – Method of Payment

- I. In accordance with Section 5 of the Contract Agreement, payments shall be made for each task performed. Under no circumstances shall payment exceed the amount set forth in Section 5 Compensation of the Agreement.
- II. Contractor will submit all bills, invoices and related documentation in the format specified by SFHSA within 15 days after the month of service to SFHSA's web-based Contracts Administration, Reporting, and Billing Online (CARBON) system at: <https://contracts.sfhsa.org>  
  
Contractor may submit bills, invoices and related documentation in the format specified by SFHSA via paper or email only upon special permission by their assigned Contract Manager.
- III. Contractor must sign up to receive payments electronically via Automated Clearing House (ACH). Remittance information will be provided through Paymode-X. Additional information and sign up is available at: <http://www.sfgov.org/ach>
- IV. The Executive Director or CFO must submit a letter of authorization designating specific users who will have access to CARBON to electronically submit and sign for invoices, budget revision requests, program reports, and view other information that is in CARBON.
  - A. Submittal of the invoice by designated authorized personnel with proper login credentials constitutes an electronic signature and certification of the invoice.
  - B. Authorized personnel with CARBON login credentials shall not share or internally reassign logins.
  - C. Contractor shall notify SFHSA Contract Manager immediately regarding any need for the restriction or termination of a previously authorized CARBON login.
- V. Invoices shall include actual expenditures incurred during the month, unless otherwise specified.
  - A. The contractor will submit a monthly invoice detailing each task performed. The contractor will maintain a record describing the activities provided.
  - B. All charges incurred under this agreement shall be due and payable only after services have been rendered, and in no case in advance of such services.
  - C. Invoices for subcontractors (if any) for the period of service must be submitted regardless of dollar amount. If requested by SFHSA, supporting documentation must be uploaded into CARBON and submitted along with the invoice.
  - D. Contractor shall supply additional specific supporting documentation when requested by SFHSA. Supporting documentation must be uploaded into CARBON and submitted along with the invoice.
- VI. Following SFHSA verification of submitted documentation and that claimed services are authorized and delivered satisfactorily, SFHSA will authorize payment within 10 business days after receipt of the invoice and all billing information set forth above submitted via CARBON.
- VII. Timely Submission of Reports – If reports/documents are required, Contractor shall submit these reports prior to submitting invoices. Failure to submit required reports/documents in CARBON by specified deadlines may result in withholding of contract payments.