



MEMORANDUM

TO: HUMAN SERVICES COMMISSION

THROUGH: TRENT RHORER, EXECUTIVE DIRECTOR

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

DATE: FEBRUARY 8, 2019

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

CONTRACT TERM:	<u>Current</u> 1/1/18- 12/31/18	<u>Modification</u> 1/1/19- 12/31/19	<u>Revised</u> 1/1/18- 12/31/19	<u>Contingency</u>	<u>Total</u>
TOTAL CONTRACT AMOUNT:	\$50,000	\$50,000	\$100,000	\$10,000	\$110,000
ANNUAL AMOUNT:	2018 \$50,000	2019 \$50,000			
Funding Source MODIFICATION FUNDING:	<u>County</u> \$100,000	<u>State</u>	<u>Federal</u>	<u>Contingency</u> \$10,000	<u>Total</u> \$110,000
PERCENTAGE:	100%*	0%	0%		100%

*Exact percentages TBD

The Department of Human Services (DHS) requests authorization to modify and extend the existing contract with John Snow, Inc. for the provision of CalFresh Marketing Services for the period of January 1, 2018 to a new end date of December 31, 2019 for an additional \$50,000 plus a 10% contingency, for a new contract amount not to exceed \$110,000. The purpose of the contract is to develop social marketing and outreach strategies that can be used by community-based partners and the San Francisco Human Services Agency (SFHSA) in an effort to increase enrollment in CalFresh.

Background

In San Francisco, only two of three persons eligible for CalFresh are receiving it. Approximately 38,000 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 and outreach strategies focusing on target populations that SFHSA will define based on the vendor's initial research findings. In 2018, Phase I for this contract completed formative research, messaging content, and a social marketing plan for English-speaking older adults and Spanish-speaking adult audiences. Phase II will provide services to implement the marketing plan and expand messaging research and outreach to the newly eligible SSI population.

Services to be Provided

The contractor will use a community-based social marketing approach to promote enrollment in CalFresh for low-income San Francisco residents. The approach includes the development of campaign materials, videos, communication resources, marketing materials, and best practices that can be used by community-based organization (CBO) partners and 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

Funding for this grant agreement will be provided by County funds, CalFresh Eligibility Funds from the State and Federal Government, and San Francisco's SSI Cash-Out Reversal Allocation from the state. The exact funding source percentages are still being worked out by HSA Budget.

Attachments

Appendix A – Services to be Provided

Appendix B – Calculation of Charges

Appendix A: Services to be Provided
John Snow Inc.
January 1, 2018 – December 31, 2019
Amended: February 2019

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
CDSS	California Department of Social Services
JSI	John Snow, Inc. (Contractor)
SFHSA	San Francisco Human Services Agency
SNAP	Supplemental Nutrition Assistance Program (known as CalFresh in CA)
SSI	Supplemental Security Income

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 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.

JSI will use a community-based social marketing approach to create research-backed outreach content that will promote enrollment in the CalFresh program among San Francisco residents, including the newly eligible SSI population. This approach includes implementation of social media messages and the development of marketing materials, based on formative research and community member feedback, which can be used by community-based organizations (CBOs)

and the Human Services Agency (SFHSA) to promote CalFresh among the newly eligible SSI population. Marketing material will be accompanied by communication resources that will help CBO partners and SFHSA and broaden the reach of CalFresh messaging. Given the current environment and upcoming changes to long standing CalFresh eligibility requirements, it is more important than ever that our vulnerable community members are aware of available help and have a clear understanding of how to secure assistance.

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 (Older Adults and Spanish Speaking Population)

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 (Older Adults and Spanish Speaking Population)

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.

Implementation of 2018 Messaging Content

JSI will assist SFHSA in implementing the messaging content for the English-speaking older adults and Spanish-speaking adult audiences developed in 2018. JSI will place paid social media ads and support SFHSA communication staff in rolling out organic content using the 2019 editorial calendar. This support will include managing public engagement with posts in both languages (English and Spanish) and continued A/B testing to monitor early ad performance and modify posts as necessary. JSI will provide SFHSA with monthly advertising summaries throughout the year and will work with SFHSA staff to build capacity in social media evaluation. JSI will also provide a final summary and recommendations for next steps at the conclusion of the contract period. This will include an analysis of campaign messaging that resonated with our target audiences and insight on the effectiveness of social media advertising as an outreach tool for CalFresh applications.

In addition to guiding SFHSA through the implementation of previously developed content, JSI will build partner capacity to implement this messaging. JSI will convene partners, such as the San Francisco-Marin Food Bank, Leah's Pantry, and Code for America, for one 90-minute meeting where JSI will share research findings and the final messaging content created for the English-speaking older adult and Spanish-speaking adult audiences. JSI will also provide suggestions for messaging implementation, review the editorial calendar for partner use, and respond to questions.

Formative Research (SSI Audience)

To inform messaging and content creation for the SSI audience, JSI will conduct a series of key informant interviews and focus groups. JSI anticipates conducting interviews with 8 potential clients or supporting figures (e.g., caregivers for seniors or persons with disabilities) from the SSI population and 2 focus groups (6-10 participants per focus group) with agencies or community-based organizations that serve the SSI population (e.g., SFHSA eligibility workers, Department of Aging and Adult Services staff, senior centers, and/or assisted living facilities). Each client JSI speaks to will receive a \$40 gift card for their participation. JSI will work with SFHSA and CBOs to determine the list of interviewees and participants. JSI anticipates that some of these interviews would take place in person and some would be conducted via phone. Two JSI staff will attend each interview and focus group, one interviewer and one note taker. For analysis, JSI will use an inductive approach to identify key themes. JSI will summarize the interview findings into a Formative Research Summary Report.

Message Development (SSI Audience)

JSI will develop message content and creative elements for local outreach materials and social media messages specific to the SSI population. While HSA plans to leverage marketing materials developed by CDSS as the primary marketing collateral, JSI will leverage insights from formative research with the SSI population to develop local strategies such as a direct mail piece to SSI recipients in San Francisco.

As part of the campaign development, JSI may collaborate with PlusM Productions (a video

production firm that JSI collaborated with to develop the previous contract's messaging content), pending their availability to create new or repurposed video material (note video production costs are not included in this scope and budget). JSI will share draft messages and creative concepts with SFHSA for early input. JSI envisions at least two rounds of message revision and review with SFHSA before finalizing. JSI anticipates creating 10 unique messages that can be used across up to three outreach channels, including social media, that are most appropriate for this population. These outreach channels will be determined by the SFHSA SSI Communications work group with input from JSI's formative research.

Following the creation of campaign materials, JSI will develop a year-long marketing plan for the SSI audience that includes outreach strategy recommendations, an editorial calendar, and ad buying recommendations. This editorial calendar will take the intended audiences into account, and recommendations will align with relevant events/holidays (for example, messages targeting older adults could align with health care open enrollment).

SSI Toolkit

In 2019, individuals who receive SSI benefits will be newly eligible to apply for CalFresh, which is an exciting change to longstanding policy. State-wide efforts will be required to generate awareness of this change and enroll eligible individuals into the program. To aid in these efforts in San Francisco, JSI will develop a high-level toolkit for local non-profit organizations, agencies, and healthcare providers working with SSI recipients in San Francisco. This toolkit will orient partners to the policy change and its implications, describe how to assist SSI recipients in applying for CalFresh, and provide research-based messaging for partners to use in their own outreach efforts as well as recommendations for how to implement them.

To develop this toolkit, JSI will review State-prepared marketing material regarding the SSI policy change, the new Get CalFresh SSI portal, and solicit input from partners (intended toolkit audience). JSI will draft the toolkit and submit to SFHSA for feedback. JSI anticipates two rounds of feedback from SFHSA on the toolkit draft.

DELIVERABLES

1) Task 1- Environmental Scan and Key Informant Interviews (March 31, 2018 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, 2018 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, 2018 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, 2018 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, 2018 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.
- 6) **Task 6- 2019 Advertising Plan Development and Implementation (December 31, 2019 completion date):**
- Monthly advertising summaries
 - Final advertising summary at conclusion of campaign
 - Support SFHSA staff with implementation of editorial calendar
 - Host partner convening to present new messages and editorial calendar (90 minutes in person)
- 7) **Task 7- Formative Research Summary Report (July 30, 2019 completion date):**
- JSI will submit an outline of the report to SFHSA prior to report development and ensure that the report will meet the needs of informing the next phases of the project – message and campaign development. To that end, potential chapters include:
 - Methodology for formative research, interviewee selection, interview guide, and analysis approach
 - Key themes in interviews and staff perspectives
 - Recommendations on messaging approaches and creative content
- 7) **Task 8- Final SSI Campaign Materials and Marketing Plan (October 31, 2019 completion date):**
- Based on all of the formative research conducted, JSI will produce campaign materials for the SSI population. Campaign materials will include:
 - 10 unique messages to be used across up to three outreach channels, including social media
 - Design and content creation for a local marketing tool (i.e. flyer, direct mail piece)
 - SSI Marketing Plan: An overview of the campaign for this specific population, outreach recommendations, and guide for implementation based on formative

research.

9) **Task 9 - SSI Toolkit (August 31, 2019 completion date):**

- (5-page maximum) toolkit that provides high-level information and guidance to local CalFresh partners regarding changes to SSI policy, how to enroll SSI recipients, and how to use JSI-developed content to engage this population.

V. **Reporting Requirements**

- A. 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 15th of the following month.
- B. Contractor will provide Ad Hoc reports as required by the Department.
- C. For assistance with reporting requirements or submission of reports, contact:

Elizabeth.Leone@sfgov.org
Senior Contracts Manager, Office of Contract Management

Or

Ana.Marie.Lara@sfgov.org
Program Manager, CalFresh

Appendix B – Calculation of Charges
John Snow Inc.
CalFresh Marketing
January 1, 2018 – December 31, 2019
Amended: February 2019

Project Timeline (Phase 1):

Task 1: Formative Research Summary (March 31, 2018 completion date)					
Staff	Hours	Rate	Total Labor Costs	Non-Labor Costs	Deliverable Total
Project Director	24	\$102	\$2,448	\$0	\$7,672
Social Media/Digital Advertising Specialist	32	\$82	\$2,624		
Outreach Manager	40	\$65	\$2,600		
Task 2: Mood Boards and Presentation to SFHSA and CBOs (April 30, 2018 completion date)					
Project Director	40	\$102	\$4,080	\$0	\$12,120
Social Media/Digital Advertising Specialist	60	\$82	\$4,920		
Outreach Manager	48	\$65	\$3,120		
Task 3: Digital and Transit Advertising (June 30, 2018 completion date)					
Project Director	16	\$102	\$1,632	\$2,680	\$10,192
Social Media/Digital Advertising Specialist	40	\$82	\$3,280		
Outreach Manager	40	\$65	\$2,600		
Task 4: A/B Testing Model, A/B Ads and Summary, and Final Campaign (August 31, 2018 completion date)					
Project Director	40	\$102	\$4,080	\$2,000	\$13,272
Social Media/Digital Advertising Specialist	56	\$82	\$4,592		

Outreach Manager	40	\$65	\$2,600		
Task 5: Editorial Calendars (September 28, 2018 completion date)					
Staff	Hours	Rate	Total Labor Costs	Non-Labor Costs	Deliverable Total
Project Director	20	\$102	\$2,040	\$0	\$6,744
Social Media/Digital Advertising Specialist	32	\$82	\$2,624		
Outreach Manager	32	\$65	\$2,080		
Phase 1 Totals:			\$45,320	\$4,680	\$50,000

Project Timeline (Phase 2):

Task 6: 2019 Advertising Plan Development and Implementation (December 31, 2019 completion date)					
Staff	Hours	Rate	Total Labor Cost	Non-Labor Costs	Deliverable Total
Project Director	72	\$96	\$6,912	\$7,500	\$20,942
Project Manager	52	\$70	\$3,640		
Research Associate	36	\$65	\$2,340		
Technical Advisor	5	\$110	\$550		
Task 7: Formative Research - SSI Audience (July 30, 2019 completion date)					
Project Director	8	\$96	\$768	\$320	\$9,998
Project Manager	60	\$70	\$4,200		
Research Associate	64	\$65	\$4,160		
Technical Advisor	5	\$110	\$550		

Task 8: Final SSI Campaign Materials and Marketing Plan (October 31, 2019 completion date)					
Staff	Hours	Rate	Total Labor Cost	Non-Labor Costs	Deliverable Total
Project Director	72	\$96	\$4,608	\$0	\$11,638
Project Manager	52	\$70	\$3,360		
Research Associate	36	\$65	\$3,120		
Technical Advisor	5	\$110	\$550		
Task 9: SSI Toolkit (August 31, 2019 completion date)					
Project Director	72	\$96	\$1,632	\$0	\$7,422
Project Manager	52	\$70	\$2,640		
Research Associate	36	\$65	\$2,600		
Technical Advisor	5	\$110	\$550		
Phase 2 Totals:			\$42,180	\$7,820	\$50,000
Contract Totals:			\$87,500	\$12,500	\$100,000

Phase 1 Cost Summary:	
Cost Description	Total Cost
Labor	\$45,320
Non-Labor	
- Media Placements	\$2,000
- Focus Group Incentives	\$1,600
-Focus Group Supplies	\$1,080
Subtotal	\$50,000
Phase 2 Cost Summary:	
Cost Description	Total Cost
Labor	\$42,180
Non-Labor	
- Media Placements	\$7,500
- Focus Group Incentives	\$320

Subtotal	\$50,000
Contract TOTAL:	\$100,000
Contingency (10%)	\$10,000
CONTRACT NOT TO EXCEED:	\$110,000

Phase 1 Staff Hours/FTE Summary:		
Staff	Hours	FTE
Project Director	140	0.06
Social Media/Digital Advertising Specialist	220	0.11
Outreach Manager	200	0.10
Total	560	0.27

Phase 2 Staff Hours/FTE Summary:		
Staff	Hours	FTE
Project Director	145	0.11
Project Manager	198	0.15
Research Associate	188	0.14
Technical Advisor	20	0.01
Total	604	0.41