



Edwin M. Lee, Mayor

MEMORANDUM

TO: HUMAN SERVICES COMMISSION

THROUGH: TRENT RHORER, EXECUTIVE DIRECTOR

FROM: SUSIE SMITH, DEPUTY DIRECTOR
JOHN TSUTAKAWA, DIRECTOR OF CONTRACTS *JT*

DATE: SEPTEMBER 22, 2017

SUBJECT: NEW CONTRACT: **CIRCLEPOINT** (FOR-PROFIT) TO PROVIDE BRAND IDENTITY DEVELOPMENT AND DEVELOPMENT OF AN EXTERNAL COMMUNICATIONS PLAN

CONTRACT TERM: 12/1/2017 – 4/30/2019

CONTRACT AMOUNT: \$246,675

ANNUAL AMOUNT:

| | <u>FY 17/18</u> | <u>FY 18/19</u> |
|--|-----------------|-----------------|
| | \$96,015 | \$150,660 |

| <u>Funding Source</u> | <u>County</u> | <u>State</u> | <u>Federal</u> | <u>Contingency</u> | <u>Total</u> |
|-----------------------|---------------|--------------|----------------|--------------------|--------------|
| FUNDING: | \$185,006 | \$29,601 | \$32,068 | \$24,668 | \$271,343 |
| PERCENTAGE: | 75% | 12% | 13% | | |

The Department of Human Services (DHS) requests authorization to enter into a contract with Circlepoint for the 17-month period of December 1, 2017 to April 30, 2019, in an amount of \$246,675 plus a 10% contingency for a total amount not to exceed \$271,343. The purpose of the contract is to provide Brand Identity Development and Development of an External Communications Plan for the Human Service Agency (HSA).

Background

The Human Services Agency (HSA) is comprised of three distinct departments operating under one administrative umbrella: the Department of Human Services (DHS), the Department of Aging and Adult Service (DAAS) and the Office of Early Care and Education (OECE). DHS administers the City’s safety net programs and child welfare. DAAS coordinates services to seniors, adults with disabilities, and their families so that they can remain living in the community for as long as possible and maintain the highest quality of life. OECE is charged with aligning and coordinating federal, state and local funding streams to improve access to high quality early care and education for children 0-5, to address the needs of the early care and education workforce, and to build early care and education system capacity.

While HSA provides vital supports and services to nearly 1 and 4 San Franciscans, it is largely unknown among City residents and even within some City departments. Further, the relationship between HSA and its departments can be confusing among other city agencies, the Mayor's Office, contracted community based organizations and clients. To address these concerns, the Agency hired a Communications Director and is building a communications team, as well as communications foundational building blocks and infrastructure.

The Contractor, Circlepoint, has developed unique and engaging brands and communications plans for numerous public agencies throughout California, including San Francisco's Office of Economic and Workforce Development, Municipal Transportation Agency, and the San Francisco Public Utilities Commission.

Services to be Provided

Contractor will develop a brand identity and external communications plan for the Human Services Agency (HSA) to better identify the three distinct departments operating under the HSA umbrella.

Toward that effort, the purpose of this contract is to:

- Develop a cohesive brand reputation strategy to better engage stakeholders and shape public perception of HSA as a provider of high-quality human services;
- Develop a cohesive visual brand identity through a look, feel, and language that signals we are part of the same umbrella organization and develop messages to clarify the relationship between HSA and its departments; and
- Formulate communications and marketing strategies that build upon the HSA brand to support HSA's overall mission to promote well-being, self-sufficiency, and positive outcomes among individuals, families and communities in San Francisco.

Core activities will include:

- Brand identity development and research
- Stakeholder interviews and focus groups
- Development of visual brand identity: logos, style guide, and graphic templates for marketing materials
- Development of foundational messaging, mission statement, and descriptions of core services
- Target audience profiles and reports
- Message development and testing to target audiences
- Development of a strategic external communications plan

For more specific information regarding the proposed services, please refer to Appendix A – Services to be Provided (attached)

Selection

Contractor was selected through Request for Proposal #730 for Strategic Communications Services that was competitively bid in December 2016.

Funding

Funding for this contract is provided by Federal, State, and County funds.

ATTACHMENTS

Appendix A – Services to be Provided
Appendix B – Calculation of Charges

Attachment 1 to Appendix B – Fee Proposal
Attachment 2 to Appendix B – Project Fee Schedule

APPENDIX A – Services to be Provided
Circlepoint
Brand Identity Development and Development of an External Communications Plan
December 1, 2017 to April 30, 2019

I. Purpose of Contract

Contractor will develop a brand identity for the Human Services Agency (HSA) and an external communications plan for the Agency. The purpose for these services is to:

- Develop a cohesive brand reputation strategy to better engage stakeholders and shape public perception of the Human Services Agency (HSA) as a provider of high- quality human services.
- Develop a unified look and feel and language that signal we are part of the same umbrella organization and develop messages to clarify the relationship between HSA and its departments.
- Formulate communications and marketing strategies that build upon the HSA brand to support HSA's overall mission to promote well-being, self-sufficiency, and positive outcomes among individuals, families and communities in San Francisco.

II. Definitions

| | |
|--------------|--|
| Contractor | Circlepoint |
| HSA | Human Services Agency of the City and County of Francisco |
| DHS | Department of Human Services of San Francisco |
| DAAS | Department of Aging and Adult Services of the City and County of Francisco |
| OECE | Office of Early Care and Education of the City and County of Francisco |
| InterEthnica | Multicultural Communications Partner |

III. Description of Services

TASK 1 – Project Management

Contractor will conduct regular check-ins with Human Services Agency ("HSA") staff to provide updates on project progress, review materials, and receive feedback. Contractor will use project management software, Asana, to manage tasks internally and keep the project moving forward.

Besides regular check-ins, Contractor will stay in close coordination with HSA staff to manage the budget and monitor the schedule on a regular basis.

Deliverables and methodology:

- Contractor will work with key stakeholders to define and document project scope;
- Ensure HSA is aware of and approves of any changes to time, cost, risk or quality that might arise from changes to project scope;
- Track major changes to project scope and other key project decisions;
- Create a high level project timeline that is easy for HSA stakeholders to understand and work with, such as an Excel spreadsheets;
- Identify and actively manage the project's critical path;
- Proactively identify, communicate, track, and report on the resolution of any obstacles that might keep the project from meeting expectations for time, cost or quality;
- Create a monthly progress report along with the monthly invoice that shows progress on major project milestones, listing major obstacles and progress towards resolution, and summarize key decisions for the past month;
- Contractor will work in partnership with key stakeholders, proactively identify and manage the mitigation of critical risks to project success; and
- At a minimum of one weekly check-in meeting (via phone) with HSA staff throughout project duration.

TASK 2 – Brand Identity Development

Contractor will carry out a suite of strategic activities in order to develop a brand identity for HSA. Contractor will partner with HSA in the creation of a visual identity that aligns with the organization's renewed mission and vision, as well as a branding guide that ensures the visual identity and messaging are implemented consistently across all communications channels.

2.1 Identify Brand Identity Development Goals

Contractor will work in close collaboration with HSA's Executive Directors, Deputy Directors, and Communications Director; Contractor will identify the goals of the brand identity development initiative from the outset of this engagement. Drawing from extensive experience in building consensus and aligning interests, Contractor will assemble a brand identity to unify HSA while also respecting the autonomy, existing reputations, and unique missions of DHS, DAAS, and OECE.

Contractor will facilitate a series of visioning sessions with key HSA staff to develop an understanding of these goals and lead into the next phases of the process, including a brand audit and research on target audiences. Contractor's brand audit and assessment process will enable us to assess the stories of each HSA department as a means of assembling a cohesive, cross-departmental brand identity.

Deliverables:

- Three in-person small meetings with each department's leadership

- One in-person visioning session with HSA leadership together
- One brand audit report

2.2 Identify Target Audiences

Building off HSA’s recent website redesign efforts, Contractor will work with HSA staff to identify internal and external target audiences for HSA and its three departments. Identifying and analyzing these target audiences, as well as market research, will inform the overall brand development strategy. Contractor will partner with internal HSA teams, such as the policy and foster children groups, to incorporate their understanding of target audiences into the work, as Contractor should be aware many internal groups already have a deep understanding of their target audiences.

Contractor understand HSA invites participation and input from all interested community members and wants to ensure that diverse and balanced perspectives are heard from a broad range of internal and external stakeholders, community based organizations (“CBOs”), and communities of concern.

To this end, Contractor will anticipate the following target audiences will be included for engagement based on location and affinity groups:

- Medi-Cal, CalFresh, and CalWORKs
- City partner agencies
- Potential foster care parents
- A subset of DAAS programs; new resource hub for seniors and people with disabilities, Dignity Fund/Office on Aging
- Low-income communities
- Immigrant families
- People who are Limited English Proficient, with a focus on Chinese, Spanish, and Vietnamese, Russian, and Tagalog speakers
- Under-served and under-engaged community members, specifically the youth (18–25 years) and the elderly (65 years and above)
- CBOs that serve the identified target audiences

Deliverables:

- Three in-person meetings with HSA staff to discuss target audiences
- Up to five one-on-one interviews with additional key staff from stakeholder groups identified
- One target audience analysis report or powerpoint deck

2.3 Conduct Secondary Research

During this phase, Contractor will:

- Review the existing HSA brand image, including collateral materials, media coverage, reports, and notes and research from the web redesign process;

- Research how other human services, early care and education and aging, and adults with disabilities programs in other counties are presenting their departments and services in order to understand the competitive landscape; and
- Review of the literature on the most effective framing and messages on issues of economic security, child/elder abuse, early care and education, and services for seniors and people with disabilities.

Deliverables:

- One secondary research report
- Competitive landscape and visual themes report for testing during primary research phase
- Draft mission and vision statement for testing during primary research phase

2.4 Conduct Primary Research, Draft Logos and Brand Assets

In partnership with InterEthnica and HSA, Contractor will conduct primary research to gain first-hand insights to inform the development of HSAs brand reputation strategy.

Contractor’s research processes are carefully designed to:

- Gather constructive, meaningful input from target audiences and key internal and external stakeholders
- Include diverse audiences, including low income, hard-to-reach, and underserved populations
- Engage internal staff to help with identifying champions for the branding work
- Facilitate culturally nuanced and multilingual research that reaches English, Chinese, Vietnamese, Russian, Tagalog, and Spanish speakers, as well as any additional languages needed. All feedback received from the community from focus groups, facilitated feedback sessions and survey, and interviews will be well-documented in written, visual, and when appropriate in audio formats.

To deepen the understanding of the target audiences listed above, Contractor will meet Outcome Objectives with an initial survey with challenging questions, such as:

- *Why will this target audience want to engage with us?*
- *What are their interest, motivations, and needs?*
- *How can we create interactive, engaging ways to capture input from target audience?*
- *What are the barriers to participation in focus groups and one-on-one interviews?*

This research will help to identify what motivates these target audiences to engage with HSA services and visual themes – which in turn will influence later stages of the brand identity development process. These individual stories help define an authentic brand essence by illuminating the often overlooked “why” of HSA’s work vs. the “what” or “how.”

Contractor will use a combination of methods to explore the competitive landscape, mission, and vision statements, and ultimately create drafts of the HSA logos and taglines.

Step 1: Conduct 1 large, facilitated session with frontline employees across programs. The questions that will be asked could include: *Who are we as HSA/Department/Program employees? What matters to us? How do we experience our jobs? How do clients experience service delivery?* Resources Needed: 1 Lead Facilitator and 4 Co-Facilitators.

Step 2: 6 focus groups with only supervisors and managers to compare what was heard from frontline employees and to understand these leaders' perspectives regarding the above questions. Resources Needed: minimum of 1 Lead Researcher and 1-2 Other Researchers per focus group.

Step 3: Conduct 1 facilitated feedback session with community partners to get feedback on the draft mission and vision statements, in addition to learning from them how they conceive of HSA/Departments/Programs, their experiences with these services directly and helping clients with them. Resources Needed: 1 Lead Facilitator and 4 Co-Facilitators.

Step 4: Conduct 15 interviews with HSA clients at community partner locations and/or with HSA frontline employees who interact with clients across different program areas and in different languages (e.g., accompany In-Home Support Services workers to home visits, interview clients at one of HSA's service centers, interview older adults at a senior center funded by HSA or parents at a child care center, etc.). Use these sessions to get feedback on the draft mission and vision statements in addition to directly witnessing HSA services and the client's experiences. Resources Needed: 1 Lead Researcher and 1-2 Other Researchers with language capacity in Spanish, Cantonese, Vietnamese, Russian, and Filipino.

Step 5: Create next iteration of mission and vision statements.

Deliverables:

- 1 facilitated session that HSA can lead in partnership with InterEthnica.
- 6 focus groups.
- 15 stakeholder interviews.
- 1 facilitated feedback session with community
- Updated mission and vision statement, top 3 visual theme selections

2.5 Final Report

Upon conclusion of the primary and secondary research activities, Contractor will assemble a final report that will synthesize all major findings into key considerations as they relate to the brand development process. The report will note the methodology used and the champions/change agents involved in the process, and Contractor will share insights meant to summarize recommendations and decisions as to how the new HSA brand was formulated and finalized.

Such insights will include aggregate responses to the most pressing questions raised during research: *What are the advantages and disadvantages to creating one unified brand? What perceptions are required of this brand in order to build public awareness and support? What marketing tools and message delivery mechanisms will be required to bring this brand to life?*

Following the compilation of this approach, Contractor will then present to the HSA executives and program management teams to share critical research findings. Contractor will ensure an open dialogue during and after this presentation so all involved parties have the opportunity to voice their interests and concerns regarding the brand strategy before delivering the final brand identity and assets.

Deliverables:

- Final research report
- Two presentations to HSA key staff – one for executive leadership and one for a larger group of HSA executive staff

2.6 Develop Brand Identity & Strategy

Contractor will use the above research and insights to deliver to HSA the brand identity assets.

Logo development will build on the selected visual themes from the previous phase of work. Contractor will iterate on the selected themes through visual mind mapping to distill the core identity concepts that emerge from the research phase. Exploring these ideas in terms of concentric circles will position HSA to arrive at a brand essence that is authentic and inspiring. Contractor will then undertake several rounds thumbnail sketches to give visual shape to broad variety brand concept executions. The pencil sketches with the strongest potential will advance to the digital stage. Contractor will present the three strongest concepts in black and white digital format for client input and feedback. Contractor will work with HSA to narrow down the options, add color and provide refinements and revisions in an iterative process to arrive at the final logo and visual brand system. This process includes up to three rounds of refinement on the chosen logo option.

After this work, Contractor will deliver to HSA the following brand assets:

- **Brand Identity:** the visual logo mark and distinctive visual language that defines the brand
- **Brand Architecture:** Illustration of the brand relationships and/or hierarchy among HSA, DHS, DAAS, and OECE.
- **Brand Vision:** Definition of how stakeholders should experience and communicate about the brand.
- **Mission Statement:** Articulation of HSA's values and objectives.
- **Tagline:** Descriptive, easy-to-recall slogan relating to the mission of HSA.
- **Positioning statement:** Portrayal of HSA within the human services sector.

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- **Messaging framework:** Matrix that outlines key messages and desired outcomes for target audiences and HSA departments.
- **Differentiators:** Distinguishing factors that positively highlight HSA and its three departments.
- **Brand story:** 100-word narrative that illustrates HSA and/or its three departments.
- **Core services statement:** Positioning statement summarizing the full breadth of HSA's services toward safety net programs, child welfare, seniors, adults with disabilities, families, and early care and education.

Contractor will then work with HSA to conduct two smaller facilitated sessions, the first with HSA frontline staff, supervisors and managers, the second with community partners and clients. Contractor may need to split out meetings with managers and frontline staff, and community partners and clients, which will be evaluated as the project progresses, and resources can be adjusted to accommodate. The purpose of both is to get feedback on the above deliverables. Resources Needed: 1 Lead Facilitator and 4 Co-Facilitators per session.

Contractor will then report on the feedback back to key HSA staff, and then make additional edits to the above before presenting with a revised draft.

Deliverables:

- Three rounds of refinement on brand and logo options
- 2 facilitated sessions that HSA can lead in partnership with InterEthnica.
- 1 presentations to HSA key staff
- A draft and final version of all the above brand assets

2.7 Create Brand Guidelines and Templates

Once the logo redesign is complete, Contractor will create brand guidelines prescribing the design of documents, signage, web/social media, and related forms of brand identifiers to ensure uniformity in style and formatting. Contractor will work with HSA staff to determine which templates and materials would be most helpful in their day-to-day work flow.

The design guidelines will include:

- **Brand Architecture & Variables for Sub-branding of the Three Departments:** Clarifying how the overarching brand relates to the department sub-brands, thoroughly defining the three departments as distinct visual identities separate from HSA as an umbrella organization.
- **Logo Usage:** Including clear-space formula, minimum size recommendations, and prohibited usage
- **Acceptable Logo Versions:** Including full- and one-color versions, lockups with sub-brands and taglines
- **Typography and Fonts:** Including main and accent fonts as well as web-safe font and approved alternatives

- **Imagery and Icon Sets:** To create a baseline definition for the brands visual language while still allowing for flexibility in brand expression
- **Photography:** Outline use of appropriate photography, photographic subjects and visual treatments
- **Integration with Website:** How to use the brand identity on the website, including sample mockups
- **Simple Reference Sheet or User Manual:** A catalogue of the specific colors, type, logos, imagery, patterns, taglines, etc. of the HSA brand:
 - Up to 10 graphic templates for key publications and communications materials including program brochures, factsheets, PowerPoint presentations, HSA letterhead -- including sub-branded variations for use by HSA's three departments -- strategic and annual reports, social media, and business cards
 - Guidelines to integrate the new brand identity into HSA's redesigned website

Additionally, Contractor will conduct a series of trainings for HSA staff as a means of shepherding all groups toward adoption and integration of the brand strategy.

Deliverables:

- One design guidelines document
- Up to 10 graphic templates for key publications and communications materials
- Ten small sessions conducted in partnership with HSA staff to onboard employees to the new brand narrative and visual identity. These will be conducted across a variety of leadership and program staff meetings, as well as the Human Services Agency, Aging and Adult Services Commissions, and Office of Early Care and Education Citizens Advisory Committee.

TASK 3 – Development of an External Communications Plan

Contractor will develop an external communications plan that positions HSA and its departments as premier providers of high-quality human services. The communications plan will focus on relaunching and reintroducing the high-level HSA brand to internal and external stakeholders.

3.1 Identify Target Audiences and Objectives

Contractor will build off the target audiences' research conducted in Task 2.2 to inform this task, and work with HSA staff to identify where there may be additional needs to expand our understanding of specific audiences. Contractor will re-evaluate hours planned for this task based on research already done to ensure we are not duplicative of previous work.

Deliverables:

- Ten one-on-one interviews (via phone) with additional key staff
- One updated target audience report

3.2 Conduct Primary and Secondary Research

To align the research efforts with those of Task 2, Contractor will engage with multicultural communications partner, InterEthnica, to conduct primary research to assemble findings on target audiences and the overall communications landscape. Methodology and approach will be similar to Task 2.4.

As a supplement, Contractor will conduct comprehensive secondary research to evaluate HSAs previous efforts with specific groups identified in task 3.1, especially where there is an identified need to learn more about particular demographics, such as Foster Care Resources.

Deliverables:

- Ten in-person interviews with key stakeholders
- One short online survey to be distributed to internal and external stakeholders via email
- One primary research report
- One secondary research report

3.3 Develop Messaging and Strategic Delivery Mechanisms

Contractor will develop customized core messaging along with strategic mechanisms to reach our identified target audiences. Messages will be clear and integrated into all outreach materials to foster an understanding of HSA's mission and objectives. These messages will be in line with the brand story. Careful attention will be paid in regard to voice, tone, and call-to-action. All messaging will be developed with the various target audiences in mind.

To ensure this core messaging reaches target audiences where they are, Contractor will provide informed recommendations on communications channels to use based on the needs and preferences of each unique target audience. Some examples of these channels and strategies might include on-line engagement platforms, email marketing, print resources, media outlets, and social media platforms.

Deliverables:

- One key messaging and communication channels framework

3.4 Test Messaging

Contractor will partner with InterEthnica to conduct testing of messaging and communications strategies. This will primarily involve six focus groups with the community. Specific community groups will be selected based on who is eligible for services and where there are needs to learn more about community concerns.

InterEthnica has a developed a methodological approach to hosting multilingual and monolingual focus groups which gives our clients intimate access to individuals who are pre-screened to match the identified criteria. InterEthnica will host focus groups in an accessible, inclusive, comfortable, and non-threatening environment in which people will be actively encouraged to express their true opinions, answer questions, and talk openly.

InterEthnica will screen and recruit focus group participants with an emphasis on the following groups that are traditionally underrepresented in these conversations:

| | | |
|---------------------|-----------------------|--------------------------------------|
| Youth (16-20 years) | LGBTQ | Low-income |
| Elderly | African Americans | Households with school-aged children |
| Chinese | Immigrant populations | Bilingual and monolingual Latinos |
| Foreign born | Filipinos | Vietnamese |
| Renters | | People with Disabilities |

Recruiting the right participants is the most important factor to consider when organizing a focus group discussion. This is especially true when working with underserved and non-English speaking communities. Contractor has a bevy of tools that we use during the recruitment cycle to ensure a well-vetted list of potential participants to choose from. InterEthnica will build time into the timeline to discuss in detail participant choices based on what was learned during the recruitment and placement interviews to create a group that will be representatives of San Francisco, are good communicators, have good synergy with one another, and to provide honest feedback.

Contractor will layer the above information and work directly with the HSA team when choosing participants to ensure each group reflects diversity within the target audience.

InterEthnica will develop criteria that are fair and reasonable to identify community-based organizations (CBOs) to help recruit focus group respondents, and where appropriate, provide a venue to host the focus group. InterEthnica will leverage our deep relationships with CBOs and their communities to ensure a positive outcome for both the CBO and HSA, thereby giving SFHSA the opportunity to maintain or further develop long-term relationships with the CBOs, and affording them access to broad and diverse audiences.

The participant screener will include the following criteria:

| | | | |
|-----------------------|--------------------|---|---------------------------------|
| Age | Sexual Orientation | Language | Years residing in San Francisco |
| Home Ownership Status | Income level | Gender | Name of Neighborhood |
| Country of origin | Ethnicity | Whether there are school-aged children in the household | Zip code |
| Availability | | | |

The screening process will include an online/print questionnaire as well as phone or in-person interviews of the potential participants.

Once there are two to three times the number of qualified respondents, Contractor will compile those results in a live Google Doc including interview notes from the recruiters. This Google Doc of potential recruits will be shared with HSA so HSA and InterEthnica can choose a group of participants that will share their input and interact well in the group setting.

Contractor will also use a small Facebook advertisement buy as means to do an A/B testing on specific messages across all key target audiences to gather more quantitative data on message effectiveness. Following this empirical testing, Contractor will work in close collaboration with InterEthnica to analyze the results and refine the proposed strategies.

Deliverables:

- Six focus groups with key stakeholders
- One round of message testing on Facebook
- One testing report
- One updated key messaging and channels framework

3.5 Present Recommendations

After Contractor have completed the research and testing, they will present key strategic recommendations to the leadership of HSA and its three departments. During and after these meetings, Contractor will maintain an open dialogue so all involved parties have the opportunity to voice their interests and concerns regarding the comprehensive external communications plan.

Deliverables:

- Three presentations to HSA key staff

3.6 Develop Communications Plan

After all recommendations have been finalized, Contractor will brainstorm, draft, revise, and finalize the external communications plan. The plan will contain the following elements:

Plan Goals: Defining the goals and objectives will get the entire team on the same page. This will help define measures of success so that the team can evaluate the effectiveness of the program over time and adjust as necessary.

Voice, Tone, and Call-to-Action: The plan will clearly articulate the tone that should be used for all messaging and outreach, as well as the main calls-to-action for each target audience group.

Messaging Framework: As developed in Task 3.4, a framework with target audiences, their motivations, and messages specific to each

Establish Social Media Presence and Guidelines: Policies for best practices around social media use, internally and with stakeholders. This will include securing social media accounts on appropriate channels

Community Partnership and Paid/Earned Media: This section will detail the wide variety of collateral, media, and outreach activities, and events HSA can leverage to communicate effectively with stakeholders. In order to ensure that any and all advertising dollars are well-spent, Contractor will do an analysis of all the communications channels to recommend unique and meaningful paid media that enjoy strong connections with HSA audiences and make the most sense for the agency based on communications goals. This includes local media outlets, digital engagement, government newsletters, and alternative weeklies. It will also include recommendations for which types of collateral to prioritize to be most effective.

Milestone-based Schedule: Developing a program timeline with clearly defined milestones will allow for more detailed and targeted outreach implementation plans, ensuring timely information and gathering meaningful input when it is most useful. Clear timelines also will focus the outreach and communication efforts where they are most needed at any given time.

Success Metrics: With input from HSA, the plan will define appropriate measures of success for each of the outreach efforts. Those measures might include number of individuals reached, the tenor of media coverage, and perhaps even public opinion research (though not included in this work scope) that measures awareness of HSA and its departments.

Deliverables:

- One draft communications plan
- One final communications plan
- Secure social media accounts
- Ten trainings sessions conducted in partnership with HSA staff

IV. Key Deliverables and Delivery Dates

Brand Identity Development

- a) Develop Goals – December 31, 2017
- b) Target Audiences – February 28, 2018
- c) Secondary Research – March 31, 2018
- d) Primary Research – June 30, 2018
- e) Final Report – June 30, 2018
- f) Develop Brand Strategy – December 31, 2018
- g) Finalize Brand Strategy – January 31, 2019
- h) Training – February 28, 2019

Development of External Communication Plan

- a) Target Audiences – June 30, 2018
- b) Primary and Secondary Research – October 31, 2018
- c) Develop Message Testing – January 31, 2019
- d) Final Recommendations – March 31, 2019
- e) Final Communications Plan – April 30, 2019

**Appendix B – Calculation of Charges
Circlepoint**

**Brand Identity Development and Development of an External Communications Plan
Effective December 1, 2017 – April 30, 2019**

I. The contract term for Brand Identity Development and Development of an External Communications Plan under this Agreement will begin effective December 1, 2017 and end April 30, 2019.

II. Contractor will be compensated upon completion of deliverables in accordance with the terms of the agreement and the budget specified in Attachment 1 to Appendix B, at the estimated costs presented based on hourly rates and materials tied to each deliverable identified therein, for an approximate total of 1,691 hours during the term of the Agreement.

Total contract amount for the 17-month period of December 1, 2017 through April 30, 2019 is not to exceed **\$246,675**. This amount includes \$7,140 in Other Direct Costs (ODC) in allowable project expenses as identified in the project budget.

III. Contractor shall submit invoices upon completion of tasks/deliverables as outlined in Appendix A, Section IV. Invoices shall document the number of hours spent on the associated deliverable/task outlined in Appendix A, and any additional work outside of the deliverable/task authorized in writing by HSA staff or management. The Contractor further understands that payment will be made only upon HSA staff and/or management confirmation of completion of each deliverable/task and will cover only those costs specifically associated with completion of that task/deliverable.

IV. Contractor understands that, of the maximum dollar obligation listed in Section 4 of this Agreement, **Twenty Four Thousand, Six Hundred Sixty Eight Dollars (\$24,668)** is included as a contingency amount and is neither to be used in the Program Budget, nor available to Contractor without a modification to this Agreement executed in the same manner as this Agreement or a revision to the Program Budgets of Appendix B, which has been approved by Contract Manager. Contractor further understands that no payment of any portion of this contingency amount will be made unless and until such modification or budget revision has been fully approved and executed in accordance with applicable City and Human Services Agency laws, regulations and policies/procedures and certification as to the availability of funds by Controller. Contractor agrees to fully comply with these laws, regulations, and policies/procedures.

V. A final closing invoice, clearly marked “FINAL,” shall be submitted no later than forty-five (45) calendar days following the closing date of the Agreement, and shall include only those Services rendered during the referenced period of performance. If Services are not invoiced during this period, all unexpended funding set aside for this Agreement will revert to City. City’s final reimbursement to the Contractor at the close of the Agreement period shall not exceed the total amount authorized and certified for this Agreement.

**Attachment 1 to Appendix B - Fee Proposal
Circlepoint
Brand Identity Development and Development of an External Communications Plan
12/1/17 – 4/30/19**

Contractor will be paid based on completion of deliverables. Payments are based on estimated costs including hourly rates and materials tied to activities under each deliverable.

| Deliverables | Cost to be billed upon completion of the Deliverables | Delivery Dates |
|--|---|-------------------|
| Task 2 – Brand Identity Development | | |
| Develop Goals <ul style="list-style-type: none"> • Three in-person meetings with department leadership • One in-person visioning session with all departments • One brand audit report | \$10,470 | December 31, 2017 |
| Target Audiences <ul style="list-style-type: none"> • Three meetings with HSA to discuss audiences • Five interviews with key staff • One target audience report | \$7,965 | February 28, 2018 |
| Secondary Research <ul style="list-style-type: none"> • One secondary research report • Competitive landscape and visual themes • Draft mission and vision statement | \$6,185 | March 31, 2018 |
| Primary Research <ul style="list-style-type: none"> • One facilitated session with HSA employees • Six focus groups with HSA leaders • One facilitated sessions with community • 15 stakeholder interviews • Updated mission and vision statement and visual themes | \$37,515 | June 30, 2018 |
| Final Report <ul style="list-style-type: none"> • One final report • Two presentations to HSA staff | \$6,715 | June 30, 2018 |
| Develop Brand Strategy <ul style="list-style-type: none"> • Three rounds of refinement on logo/brand • Two facilitated sessions to review logo/brand • One presentation to HSA staff • Draft and final brand elements | \$31,760 | December 31, 2018 |
| Finalize Brand Strategy <ul style="list-style-type: none"> • One design guidelines document • Ten graphic templates | \$7,440 + \$2,000 ODC | January 31, 2019 |
| Training <ul style="list-style-type: none"> • Ten training sessions with HSA staff | \$12,450 | February 28, 2019 |

**Attachment 1 to Appendix B - Fee Proposal
Circlepoint
Brand Identity Development and Development of an External Communications Plan
12/1/17 – 4/30/19**

| | | |
|--|------------------------|---|
| Task 3 – Development of External Communication Plan | | |
| Target Audiences <ul style="list-style-type: none"> Ten interviews with additional staff One updated target audiences report | \$5,670 | June 30, 2018 |
| Primary and Secondary Research <ul style="list-style-type: none"> Ten interviews with key stakeholders One short online survey One primary research report One secondary research report | \$12,350 | October 31, 2018 |
| Develop Messaging <ul style="list-style-type: none"> One draft and final key messaging framework Six focus groups One round of message testing on Facebook One testing report | \$31,530 + \$4,000 ODC | January 31, 2019 |
| Final Recommendations <ul style="list-style-type: none"> Three presentations to HSA staff | \$6,900 | March 31, 2019 |
| Communications Plan <ul style="list-style-type: none"> One draft communications plan One final communications plan Secure social media accounts Ten training sessions with HSA staff | \$20,735 | April 30, 2019 |
| Task 1 – Project Management | | |
| Check-in meetings with HSA staff and on-going project management will be billed monthly as needed | \$41,850 + \$1,140 ODC | As needed; billed monthly per hourly rate |

Total Budget: \$246,675

Contract Period: December 1, 2017 to April 31, 2019

Attachment 2 to Appendix B - Project Fee Schedule
 Circlepoint - Brand Identity Development and Development of an External Communications Plan

| Tasks | Rates | | | | | | | | | | Total Hours | Total Dollars | Payment Table | | | | | | |
|--|--------|--------|----|-------|-----|-----|--------|---------------|-----|---------------------|-------------|---------------|---------------------|--|----------|--------------|---------------|--|--|
| | 195 | 120 | 95 | 165 | 120 | 100 | 150 | Free Schedule | ODC | FY17-18 Deliverable | | | FY18-19 Deliverable | | | | | | |
| Task 1: Project Management | | | | | | | | | | | | | | | | | | | |
| Check-in meetings with HSA staff (60) | 60.00 | 60.00 | | 60.00 | | | 60.00 | | | | 180.00 | \$ 28,800.00 | | | | | | | |
| On-going project management | 30.00 | 60.00 | | | | | | | | | 90.00 | \$ 13,050.00 | | | | | | | |
| Subtotal Task 1: Project Management | 90.00 | 120.00 | | | | | 60.00 | | | | 270.00 | \$ 41,850.00 | | | 1,140.00 | \$ 21,495.00 | \$ 21,495.00 | | |
| Task 2: Brand | | | | | | | | | | | | | | | | | | | |
| 2.1 a - Three in-person meetings with department leadership | 6.00 | 12.00 | | | | | | | | | 30.00 | \$ 4,590.00 | | | | | | | |
| 2.1 b - One in-person working session with all departments | 4.00 | 6.00 | | | | | | | | | 20.00 | \$ 3,150.00 | | | | | | | |
| 2.1 b - One brand audit report | 2.00 | 4.00 | | | | | | | | | 22.00 | \$ 2,730.00 | | | | | | | |
| 2.2 a - Three meetings with HSA to discuss audiences | 3.00 | 3.00 | | | | | | | | | 24.00 | \$ 3,510.00 | | | | | | | |
| 2.2 b - Five meetings with additional key staff | 5.00 | 12.00 | | | | | | | | | 20.00 | \$ 2,715.00 | | | | | | | |
| 2.2 c - One target audience report | 2.00 | 8.00 | | | | | | | | | 12.00 | \$ 1,680.00 | | | | | | | |
| 2.3 a - One secondary research report | 2.00 | 4.00 | | | | | | | | | 20.00 | \$ 2,480.00 | | | | | | | |
| 2.3 b - Competitive landscape and visual themes | 2.00 | 5.00 | | | | | | | | | 18.00 | \$ 2,580.00 | | | | | | | |
| 2.3 c - Draft mission and vision statement | 1.00 | 5.00 | | | | | | | | | 8.00 | \$ 1,125.00 | | | | | | | |
| 2.4 a - One branded session with HSA employees | 2.00 | 2.00 | | | | | | | | | 56.00 | \$ 8,550.00 | | | | | | | |
| 2.4 b - Six focus groups with HSA leaders | 12.00 | | | | | | | | | | 72.00 | \$ 11,520.00 | | | | | | | |
| 2.4 c - One facilitated feedback session with community | 2.00 | 2.00 | | | | | | | | | 56.00 | \$ 8,550.00 | | | | | | | |
| 2.4 d - 15 stakeholder interviews | 2.00 | | | | | | | | | | 47.00 | \$ 7,140.00 | | | | | | | |
| 2.4 e - Updated mission and top three visual themes | 3.00 | 3.00 | | | | | | | | | 12.00 | \$ 1,785.00 | | | | | | | |
| 2.5 a - One final research report | 4.00 | 6.00 | | | | | | | | | 18.00 | \$ 2,700.00 | | | | | | | |
| 2.5 b - Two presentations for HSA staff | 6.00 | 8.00 | | | | | | | | | 56.00 | \$ 7,620.00 | | | | | | | |
| 2.6 a - Three rounds of refinement on logo/brand | 6.00 | 6.00 | | | | | | | | | 27.00 | \$ 4,015.00 | | | | | | | |
| 2.6 b - Two facilitated sessions to review logo/brand | 4.00 | 4.00 | | | | | | | | | 110.00 | \$ 16,770.00 | | | | | | | |
| 2.6 c - One presentation to HSA key staff on logo/brand | 2.00 | 4.00 | | | | | | | | | 12.00 | \$ 1,680.00 | | | | | | | |
| 2.6 d - Draft and final brand elements | 8.00 | 6.00 | | | | | | | | | 40.00 | \$ 5,510.00 | | | | | | | |
| 2.7 a - One design guidelines document | 2.00 | 2.00 | | | | | | | | | 24.00 | \$ 3,390.00 | | | | | | | |
| 2.7 b - Ten graphic templates | 2.00 | | | | | | | | | | 38.00 | \$ 4,060.00 | | | | | | | |
| 2.7 c - Ten training sessions for HSA staff | 20.00 | 30.00 | | | | | | | | | 80.00 | \$ 12,450.00 | | | | | | | |
| Subtotal Task 2: Brand | 100.00 | 122.00 | | | | | 152.00 | | | | 822.00 | \$ 120,900.00 | | | | | | | |
| Task 3: Communications Plan | | | | | | | | | | | | | | | | | | | |
| 3.1 a - Ten interviews with additional staff | 8.00 | 25.00 | | | | | | | | | 33.00 | \$ 4,580.00 | | | | | | | |
| 3.1 b - One updated target audiences report | 2.00 | 6.00 | | | | | | | | | 34.00 | \$ 5,130.00 | | | | | | | |
| 3.2 a - Ten interviews with key stakeholders | 1.00 | 2.00 | | | | | | | | | 17.00 | \$ 2,580.00 | | | | | | | |
| 3.2 b - One brand online survey | 2.00 | 2.00 | | | | | | | | | 14.00 | \$ 2,580.00 | | | | | | | |
| 3.2 c - One primary research report | 2.00 | 2.00 | | | | | | | | | 20.00 | \$ 2,480.00 | | | | | | | |
| 3.2 d - One secondary research report | 4.00 | 4.00 | | | | | | | | | 28.00 | \$ 3,540.00 | | | | | | | |
| 3.3 - One key messaging and channels framework | 6.00 | 6.00 | | | | | | | | | 118.00 | \$ 17,880.00 | | | | | | | |
| 3.4 a - Six focus groups with stakeholders to test messaging | 4.00 | 16.00 | | | | | | | | | 46.00 | \$ 5,510.00 | | | | | | | |
| 3.4 b - One round of testing messages on Facebook | 2.00 | 6.00 | | | | | | | | | 20.00 | \$ 2,830.00 | | | | | | | |
| 3.4 c - One testing report | 2.00 | 4.00 | | | | | | | | | 14.00 | \$ 1,770.00 | | | | | | | |
| 3.4 d - One updated key messaging and channels framework | 12.00 | 16.00 | | | | | | | | | 44.00 | \$ 5,900.00 | | | | | | | |
| 3.5 - Three presentations to HSA staff for key recommendations | 4.00 | 6.00 | | | | | | | | | 28.00 | \$ 3,640.00 | | | | | | | |
| 3.6 a - One draft communications plan | 4.00 | 12.00 | | | | | | | | | 18.00 | \$ 2,540.00 | | | | | | | |
| 3.6 b - One final communications plan | 4.00 | 6.00 | | | | | | | | | 19.00 | \$ 2,165.00 | | | | | | | |
| 3.6 c - Secure social media accounts | 2.00 | | | | | | | | | | 80.00 | \$ 12,450.00 | | | | | | | |
| 3.6 d - Ten training sessions for HSA staff | 20.00 | 30.00 | | | | | | | | | 541.00 | \$ 77,185.00 | | | | | | | |
| Subtotal Task 3: Communications Plan | 77.00 | 144.00 | | | | | 80.00 | | | | 1,633.00 | \$ 239,535.00 | | | 7,140.00 | \$ 96,015.00 | \$ 150,860.00 | | |
| Subtotal Labor | 267.00 | 391.00 | | | | | 292.00 | | | | 88.00 | \$ 128,850.00 | | | | | | | |
| Other Direct Costs (ODC) | | | | | | | | | | | | \$ 239,535.00 | | | | | | | |
| Printing | | | | | | | | | | | | \$ 500.00 | | | | | | | |
| Travel | | | | | | | | | | | | \$ 300.00 | | | | | | | |
| Stipends for focus groups (6) | | | | | | | | | | | | \$ 3,000.00 | | | | | | | |
| Stock Photography (for brand guidelines) | | | | | | | | | | | | \$ 2,000.00 | | | | | | | |
| Facebook ad buy (message testing) | | | | | | | | | | | | \$ 1,000.00 | | | | | | | |
| Subtotal ODCs | | | | | | | | | | | | \$ 6,800.00 | | | | | | | |
| 5.0% Mark-Up on ODCs | | | | | | | | | | | | \$ 340.00 | | | | | | | |
| Total ODCs | | | | | | | | | | | | \$ 7,140.00 | | | | | | | |
| TOTAL | | | | | | | | | | | | \$ 246,675.00 | | | | | | | |

Assumptions
 Period of performance is 17 months during December 1, 2017 to April 30, 2019