

November 1, 2019

Request for Proposal:

BRAND REDESIGN, COMMUNICATION/SOCIAL MEDIA OUTREACH, AND MEMBER ENGAGEMENT

Schools Insurance Group (SIG) is a Joint Powers Authority (JPA) serving its 34 public K-12 school districts and charter school members from five counties, and predominantly those in Placer and Nevada Counties. Its website is www.schoolsinsurancegroup.com. SIG is headquartered in Auburn, CA. SIG is committed to serving its members, and does so through a lean staffing model, with a total of 8 employees.

SIG provides three programs for its members: Employee Benefits/Employee Assistance Program/Wellness, Workers Compensation, and Property/Liability. Revenues are in excess of \$100M annually. All programs are adequately funded, and SIG enjoys a consistently strong financial position. Recent legislation, however, may have a significant impact on all JPAs in California, including SIG. We realize that a strong brand, consistent communication, and member engagement will be vital to successfully navigating upcoming challenges.

SIG has recently completed a strategic plan that includes initiatives to revitalize its brand, improve communication strategies both internal and public facing to include a social media presence, and increase member engagement with resources and programs.

The purpose of this RFP is to identify a partner that can help SIG assess its value to members, and highlight this value through branding and communications/social media strategy to better engage the membership. This RFP serves to request the itemized cost of the process to complete the projects as listed below. Please note, we are not looking for brand designs or specific taglines through this RFP, however, the successful bidder may anticipate the following projects to be included in the scope of work to be awarded:

- New brand identity for not only SIG, but also for our Employee Assistance Program. Develop a brand that strongly represents the organization and that can be clearly communicated to its members.
- New website that provides a great representation for current members, a login section to access program details, a content management system so SIG can update its own content, a secure online payment mechanism to enable payment by credit cards, and a promotions page that will engage potential new members.
- New marketing materials for promotions to grow the JPA as well as to coincide with specific JPA campaigns:
 - o Employee Benefits Open Enrollment
 - o Workers Compensation and Property/Liability underwriting/information gathering for renewal
 - o Back to School safety training
 - o Student Assault Prevention
 - o Other campaigns as identified
- An annual communications calendar that can be directed to SIG's members
- A social media strategy including various platforms that can be easily maintained
- Optional: A mobile app to provide secure login and interface with specific SIG resources

To qualify to respond to this RFP, please email Executive Director Cindy Wilkerson at cindyw@sigauburn.com by November 8, 2019, with your intent to provide a response. Please also email to the same address any questions no later than November 15, 2019. Any questions received will be shared with all qualified bidders.

Timeline:

- Notice of intent to respond due by 4:30 pm PST on November 8, 2019
- Questions due by 4:30 pm PST on November 15, 2019
- RFP responses are due by 4:30 pm PST on November 22, 2019 emailed to cindyw@sigauburn.com.
- Finalist presentations will be scheduled for the afternoon of December 9, 2019, time to be determined. This date may be revised as needed.
- Pilot launch would be preferred by July, 2020, with full launch by January, 2021.

Please briefly answer the following questions:

BACKGROUND AND ORGANIZATION

- Please provide a brief overview of relevant Company history.
- Please provide details of the communication services and support you provide.
- Please list clients for whom you have provided services similar to those you are bidding on in terms of scope, demographics and business environment. K-12 public school districts or JPA experience is much preferred.
- Describe your competitive advantage.

PEOPLE AND RESOURCES

- Please provide details of the individuals who will be deployed on this project, including:
 - An outline of the number of staff you plan to deploy on the contract.
 - An organizational chart, encompassing the staff numbers from the above.
 - An overview of the experience of all staff to be deployed on the contract and a summary of their expertise, and how you feel this appropriately meets our requirements.
- What facilities, data and/or other information would you require from the client?

BRAND

- Please explain how you would partner with the client to establish a brand and ensure a consistency of branding.

GENERAL

- How would you propose to understand SIG's business and culture?
- What is your process for gathering member input and feedback?
- What is your standard approach to starting work and onboarding a new client?
- What is your communication policy on keeping customers updated with any business changing events?
- What provisions are in place to protect the client's level and range of service in the event of your being acquired by another company, in the event of your acquiring another company, or suddenly increasing your customer base?
- Please provide three references relevant to this contract.

COMMUNICATION STRATEGY

- What is your process for developing a communications strategy leading to greater member engagement?
- How would you provide proactive solutions to meet our communication needs and help identify the most effective strategy to meet these needs?
- How do you stay apprised of the changing communications market, trends and innovation?
- Please outline your approach to measuring the effectiveness of your communication?

DIGITAL AND ONLINE

- Please tell us about your approach to digital solutions and the technology you use to deliver them.
- Describe the typical employee user journey and the skills you have internally to improve and adapt the user experience to be best in class.

DATA

- How do you guarantee data management, security, and integration? What assurances and best practice methods can you give us about the way you handle and securely manage data?
- How will you collect, gather, and analyze data from SIG members?
- Do you have an ISO certification, or related certification related to the services/systems you are proposing? Please provide evidence of such.

FEES

- Please provide an overview of your pricing and an example of costs, including a copy of any rate card utilized.