



MEMORANDUM

TO: HUMAN SERVICES COMMISSION

THROUGH: TRENT RHORER, EXECUTIVE DIRECTOR

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

DATE: JUNE 22, 2018

SUBJECT: NEW CONTRACT: **PIER 2 MARKETING (FOR-PROFIT)** FOR THE DEVELOPMENT OF AN INTERNAL COMMUNICATIONS PLAN

CONTRACT TERM: 10/1/2018 – 9/30/2019

CONTRACT AMOUNT: \$90,000

ANNUAL AMOUNT:

	<u>FY 18/19</u>	<u>FY 19/20</u>		
	\$75,000	\$22,500		

Funding Source	<u>County</u>	<u>State</u>	<u>Federal</u>	<u>Total</u>
FUNDING:	\$67,500	\$10,800	\$11,700	\$90,000
PERCENTAGE:	75%	12%	13%	

The Department of Human Services (DHS) requests authorization to enter into a contract with Pier 2 Marketing for the 12-month period of October 1, 2018 to September 30, 2019, in the not to exceed amount of \$90,000. The purpose of the contract is for the development of an internal communications plan for the Human Services Agency (HSA).

Background

The Human Services Agency (HSA) is one of the City and County of San Francisco’s largest agencies, with over 2,200 employees dispersed among three distinct departments operating under one administrative umbrella: the Department of Human Services (DHS), the Department of Aging and Adult Services (DAAS), and the Office of Early Care and Education (OECE). HSA employees are spread across over 60 different programs operating out of ten different locations – in addition to many employees working remotely or in the field. While all employees work under the umbrella of HSA, the relationship between HSA and its departments can be confusing to agency staff, and the size and span of the organization can leave many feeling disconnected from the wide range of services and supports provided to nearly one in four San Franciscans.

Agency initiatives and activities tend to prioritize client outcomes, which are core to HSA's mission of promoting well-being and self-sufficiency among San Francisco residents. While less visible to external stakeholders, of equal importance is consideration for the well-being of the staff who have dedicated themselves to serving our clients each day. As the front line of communication to our clients and stakeholders, engaged and well-informed employees are vital to ensuring quality service delivery. Research on employee engagement indicates that increased employee engagement and connectedness to a larger organization often result in increased productivity, lower turnover rates, dedication to the agency's interests, and increased enthusiasm for the organization's mission.

An all staff survey of HSA employees was conducted in 2015 to better understand the experience of our employees and opportunities for improvement. Not unlike other large bureaucracies and consistent with previous HSA staff surveys, we face some challenges in a few interrelated areas:

- Internal communication, particularly between line staff and management;
- Employee morale;
- Transparency in decision-making; and,
- Trust in management, particularly the further removed a staff person is from direct lines of communication with management.

The all staff survey also shed light on the need for more cross-programmatic learning opportunities which directly impacts service delivery and our "no wrong door" approach. Staff need a basic understanding of programs and access points in other parts of our agency in order to make warm hand-offs. For example, a social worker in Family and Children's Services may be able to refer one of their clients to CalWORKs if they have a basic understanding of the eligibility criteria for the program and, if that client was not eligible for the program, the CalWORKs worker could then refer them to the Office of Early Care and Education to apply for child care subsidies available to those who are not eligible for CalWORKs child care subsidies. Similar to other very large public and private organizations, staff are sometimes unaware of the comprehensive set of services offered outside of their own program.

Staff have provided positive feedback to new initiatives implemented in response to issues raised by the survey. For example, in 2017 and 2018, HSA communications and executive leadership hosted a series of staff town halls aimed at providing an opportunity for staff to hear from, and engage with, executive leadership. Results from surveys sent after the Town Halls were overwhelmingly positive, but also expressed a strong desire for more opportunities and additional platforms to allow interaction with leadership and staff from other departments. Events like this help staff feel more connected to HSA's mission and the role they play in helping our clients and communities; however, they also further highlight the need for an internal communications plan in order to fully address staff feedback in a strategic and cost effective way.

This contract will provide the resources and expertise needed to better understand the most effective strategies to communicate with and hear from staff; the nature of content staff want; and opportunities and challenges for increased employee engagement across HSA.

The Contractor, Pier 2 Marketing, has developed and implemented internal communications plans with a focus on creativity, innovation, and prime customer service, for numerous public agencies throughout the United States.

Services to be Provided

The purpose of this contract is to:

- Improve employee engagement and morale;
- Improve cross-program knowledge among DHS, DAAS, and OECE staff, in order to connect clients to more services; and,
- Improve consistency in communication across HSA departments and programs.

Deliverables include:

- An internal communications plan with recommended strategies/mechanisms to improve communications across and within HSA; and,
- An internal communications toolkit that provides templates and examples that can be used as guidelines for implementation of the plan (e.g. examples of content for the intranet).

Core activities will include:

- Conducting secondary research, including a review of the 2015 staff survey results;
- Identifying goals and objectives of the internal plan;
- Identifying key internal audiences, communications ambassadors, and potential change agents across the three departments;
- Conducting primary research, including an online survey, brainstorming sessions, internal stakeholder interviews, and a focus group;
- Developing of an inventory of the most used internal communication strategies and practices across and within DHS, DAAS, and OECE;
- Message development and testing communications strategies to internal target audiences; and,
- Developing an internal communications plan and toolkit.

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
Pier 2 Marketing
Development of an Internal Communications Plan
October 1, 2018 – September 30, 2019

I. Purpose of Grant

Contractor will develop an internal communications plan for the Human Services Agency. The services provided in this area will identify best practices and application of internal communications tools and methods with the objective to improve staff engagement, cross-program knowledge among DHS, DAAS, and OECE, improved employee morale, and consistency in the communication across HSA departments and programs.

Services will include, but not be limited to:

- a) Review 2015 staff survey results.
- b) Identify the goals of the internal plan with HSA executive directors, deputy directors and communications director.
- c) Identify key internal audiences, communications ambassadors, and potential change agents across the three departments.
- d) Conduct primary research, including: an online survey, interviews, and one focus group with a variety of internal stakeholders from each of HSA's three departments. Building on prior staff surveys, this research will assess bright spots and challenges in current communication practices across and within HSA. The research process will engage staff at different levels of the Agency in co-creating new and effective communication tools.
- e) Develop an inventory of the most used internal communication strategies and practices across and within DHS, DAAS and OECE.
- f) Draft an internal communications plan with recommended strategies/mechanisms to improve communications, both horizontally and vertically, across and within HSA. Contractor will apply best practices in communication tools and techniques in large public and/or private sector entities to HSA's context.
- g) Present a draft of the plan to HSA's leadership as well as representatives from varying levels of the Agency.
- h) Test internal communications strategies by rolling out HSA's new brand or another communication effort/campaign relevant at the time these tests take place. Analyze test results and refine the plan accordingly.
- i) Finalize internal communications plan, which includes a standard toolkit, implementation plan, estimated budget, and evaluation metrics for follow up.

II. Definitions

Contractor	Pier 2 Marketing
Core Message	A term used to describe those key high-level points that a group or individual wants to convey or communicate to their audience. It can be also specific ideas or points they want the audience to remember.
DAAS	Department of Aging and Adult Services of the City and County of San Francisco
DHS	Department of Human Services of San Francisco
HSA	Human Services Agency of the City and County of San Francisco
OECE	Office of Early Care and Education of the City and County of San Francisco
Personas	Fictional, generalized representations of the main segments in a population. They help internalize the ideal “customer/population” to target, and relate them as real humans with their unique characteristics, ways of communicating, learning and interacting with others.

III. Target Population

The target population is all HSA staff.

IV. Description of Services

Contractor shall provide the following services during the term of this contract:

Task 1 - Kick off meeting. Refine project plan and timeline.

Contractor will meet with HSA Program Team and other relevant stakeholders to discuss the goals and objectives in more detail, as well as to gather the necessary information, requirements and input from the different areas involved in this project. Based on this information, Contractor will review the project work plan and timeline, make any necessary changes, and agree on the final deliverables. Contractor will send the work plan and timeline to HSA’s Program Team for final approval.

Activities:

- Determine goals, objectives, challenges and opportunities for the HSA internal

communications plan.

- Define the toolkit content, based on suggested deliverables, scope to be revised and finalized on task 8.
- Based on this meeting, refine project plan and timeline. Present plan to HSA team for feedback and approval.

Responsible: Contractor, HSA executive directors, deputy directors and communications director.

Deliverables: a) Kick off meeting and b) Refined project plan, timeline and deliverables.

Task 2 - Conduct secondary research

Contractor will review the results from the HSA staff survey conducted in 2015, as well as any other relevant information for these efforts. Contractor will rely on HSA's team to share additional materials for review, if necessary. Contractor will also attend one executive staff meeting to observe the team dynamics and gather feedback. Contractor will also visit one site to observe day-to-day interaction and culture dynamics. Based on these efforts Contractor will highlight key takeaways to explore on the consecutive research efforts.

Activities:

- Review the results of the staff survey conducted in 2015, and if necessary any other relevant research/information.
- Executive staff meeting observation and site visit.
- Identify key takeaways to explore on brainstorming session and primary research efforts.

Responsible: Contractor, HSA team to facilitate review of 2015 survey, and other relevant information to Contractor. HSA team to help coordinate meeting observation and site visit.

Deliverables: a) Review results of staff survey (2015). b) Executive staff meeting observation + site visit. c) Key takeaways from secondary research.

Task 3 - Brainstorming sessions with internal audience (selected audience).

Contractor will have three brainstorming sessions with a group that is representative of HSA's stakeholders*. Each will be 1-3 hour sessions. Contractor will use design thinking and brainstorming techniques to identify the key stakeholders' challenges and analyze the landscape. By using design thinking Contractor's team will be able to focus on three things: (1) Empathy (what drives internal stakeholders emotionally and rationally), (2) current communications tools/channels used, and (3) the ability to use proper storytelling in the process to create an internal communications strategy that is relevant for all.

Activities:

- Define with HSA team, internal audience for brainstorming sessions.
- Hold three brainstorming sessions (1-3 hours) with selected internal audience. Use Design Thinking and other facilitation techniques to identify key stakeholders,

- challenges & analyze landscape.
- Identify current communication strengths, weaknesses, flow (vertical & horizontal) and opportunities.

Responsible: Contractor, HSA team to help define the groups for the brainstorming sessions and related logistics.

Deliverables: Summary of insights from the brainstorming sessions.

* Stakeholders will be separated into three sessions - One with executive directors and two with teams formed from different departments, levels and programs - 10-12 people each.

Task 4 - Conduct primary research

Contractor to get input from HSA's different stakeholders (at different levels, departments and programs). To do this, Contractor will use the following research tools:

Online survey and in-person interviews. In order to hear the voice of HSA's different stakeholders, Contractor will launch an online survey to determine the perception of the internal communications, cultural and functional challenges. Contractor will look into the different departments' awareness to identify cross-communication flow of information. It will be at the discretion of HSA's Program team to decide the groups Contractor will target through this survey. For certain segments of the internal audience, Contractor will use interviews. Interviews are effective for those segments that might not be represented on the online survey, or for those stakeholders that Contractor wants to talk to in more detail.

Focus groups. Once Contractor gathers and analyzes the information from these efforts, Contractor will conduct one focus group to gather more in-depth and qualitative information. The objective will be to get more input/feedback from certain survey questions.

Contractor's team will present a summary of all the research efforts to HSA's Program Team and other relevant stakeholders.

Activities:

- Based on prior research insights and brainstorming session, draft online survey questionnaire (max. 20 questions - not including filtering data) to identify internal audiences, engagement, communications challenges and opportunities, potential communications ambassadors or change agents across the three departments.
- Deploy online survey, gather and analyze results (two-week response time, send reminder after week one).
- Draft interview questionnaire. Send to HSA Program Monitor for feedback and approval. Make any necessary changes.
- Select with HSA team the audience for interviews and focus group.
- Schedule interviews with a representative group of internal stakeholders (12-18).
- In tandem with the online survey, conduct interviews among selected internal audiences. Gather interview insights.
- Schedule one focus group with a selected audience (team formed from different

departments, levels and programs - 10-12 people).

- Analyze results of online survey and interview insights. Conduct focus group/ Design Thinking session to get more in-depth information and test hypotheses.
- Analyze and create summary of research results and the focus group session.
- Present research results to HSA team and other relevant stakeholders (on some of the weekly/monthly meetings - Deputy/Executive Directors meeting).

Responsible: Contractor, HSA leadership team, HSA internal audiences. HSA team to approve questionnaires, and help select audience for interviews and focus group.

Deliverables: a) Online survey (max. 20 questions), b) 12-18 interviews, c) 1 focus group (10-12 people), d) Summary of primary research, and e) Presentation of research results (HSA team and other relevant stakeholders).

Task 5 - Conduct secondary research

Contractor will review, based on the research efforts, the current main/most used communications materials and tools being used across HSA and its three departments, and make an assessment of the content, channels and form factors in use.

Activities:

- Develop inventory of the current main/most used internal communications strategies and practices across DHS, DAAS and OECE.

Responsible: Contractor, HSA team to facilitate these materials to Contractor. Some of the identification will come from prior research efforts, which Contractor may validate at this stage.

Deliverables: Inventory of current communications practices across all three HSA departments.

Task 6 - Identify “personas” for target audiences, messaging and communications channels.

Contractor will use the research efforts (primary and secondary) to identify the different “personas” within HSA- the different segments or internal audiences in the organization that may have shared qualities or preferences. Contractor will make a profile for each of these personas and identify the communications channels that work best for each audience- in terms of reach and preference. Contractor will also identify the key messages for these personas, type of content to be shared and form factors to which they may be more receptive.

Activities:

- Based on research and brainstorming sessions, determine the “personas” among internal audiences.
- Develop profile, strategy and channels to reach these “personas”.
- Identify customize messaging/type of content for these “personas”.
- Identify best channels to trigger change and change agents.

Responsible: Contractor

Deliverables: Summary of personas profile and communication strategy for each (strategy, channels, main messaging, content examples).

Task 7 - Develop a draft of the internal communications plan

Based on the target audience, and most importantly the “personas” identified on the previous phases of this project, Contractor will select those communications channels and the mix that makes the most sense to reach each of them effectively. Contractor will also identify the type of content and information to be shared on each of these channels.

The internal communications plan will define a clear strategy, it will set the goals that Contractor wants to achieve for each group, the tactics to reach these goals, and the specific initiatives per segment and communication channel for its execution. To create this plan Contractor will apply best practices in communication tools and techniques in large public and/or private sector entities to HSA’s context.

Contractor will also define and establish a way to monitor key metrics that will help the project team measure and evaluate the results. In this way, the plan can be adjusted/refined, when necessary as it gets implemented.

Activities:

- Develop a draft of the internal communications plan with recommended strategies/mechanisms to improve communications, both horizontally and vertically within HSA.
- Apply best practices based on previous experience developing internal communications plans.
- Identify key channels and specific tools to improve internal communications, including recommendations for HSA intranet* and other external tools.

Responsible: Contractor.

Deliverables: Draft of internal communications plan.

*Contractor could work with the Intranet team to see current efforts and provide suggestions based on internal communications efforts proposed.

Task 8 -Present plan and recommendations

Contractor will present the summary of this initial plan and gather feedback from HSA’s Program Team (and any other key internal stakeholders). Formed on this feedback, Contractor will make any necessary changes and refine the plan accordingly.

At this meeting, Contractor will also suggest the tests they would like to do for some of these initiatives/channels, and agree with HSA’s Program Team on the main theme to be communicated (whether it may be the new external brand, or other effort that may be

relevant at the time that these tests will be executed). At this point, the program manager will clearly define the suggested tests, what Contractor expects to get out of these tests, and how Contractor will measure the results, feedback and output of these tests. Finally, at this point Contractor will also agree on the toolkit content/deliverables to be developed and presented on task 10.

Activities:

- Present plan to HSA’s leadership and other relevant stakeholders. Gather feedback.
- Define scope and activities for internal tests, including: goals, timeline, necessary resources, metrics for feedback and output.
- Define toolkit content and confirm deliverables.

Responsible: Contractor, HSA leadership team, and other relevant stakeholders (e.g., Deputy or Executive Directors)

Deliverables: a) Presentation of the draft of the internal communications plan (in person presentation), b) Refined scope and lists of tests to be executed on task 9, and c) Finalized toolkit contents/deliverables for task 10.

Task 9 - Test internal communications channels/tools

Once Contractor and HSA’s Program Team agree on the scope and tests to be made. Contractor will conduct these tests methodically targeting the different personas across HSA. The core of the tests will be done online by an email or newsletter sent to HSA employees communicating a “core message” related to the main theme to be communicated as agreed upon in task 8. Contractor may also conduct a focus group to get feedback from relevant stakeholders about these channels or initiatives. In the case of a focus group, it will be important that it includes a representative sample of the key stakeholders. Contractor’s objective will be to see the reaction, perception, engagement and acceptance of these concepts, form factors, tools and messages.

In the case of online communications (email or newsletter and landing page), it will be important for Contractor’s team to track every point of contact with the test audience to measure and analyze their reaction/engagement with these materials/channels. Based on the results of these tests, Contractor will refine the tools, channels, suggested content and messaging- as well as modify the internal communications plan accordingly to reflect these changes. Contractor will present the results of these insights to HSA’s Program Team. Contractor will gather feedback and make the last refinements to the internal communications plan.

Activities:

- Test some of the suggested internal communications materials and messaging on the new plan to roll out HSA’s new external brand or a different effort/initiative.
- Gather feedback and analyze results.
- Refine internal communications strategy.

Responsible: Contractor, HSA leadership team, HSA internal audiences.

Deliverables: a) Test 2-4 of the suggested channels/tools on the initial internal communications plan. This may include an (1) email or an e-newsletter to all personnel or a specific group, a (1) landing page with related content on the intranet (click on call to action), and (1-2) printed examples of other communications (to be tested with a smaller group - focus group of 10-12 people).

Task 10 - Finalize the internal communications plan

Based on the results of these tests, Contractor will make any necessary changes and refine the plan accordingly. The project deliverable will then be the final version of the internal communications plan. Contractor will also provide a standard toolkit that HSA's Program Team will be able to use as a guideline for the implementation of this plan.

Activities:

- Based on test results, refine internal communications plan. Specify suggested budget and evaluation metrics on the plan.
- Develop internal communications standard toolkit (requirements or things to cover on the internal communications toolkit to be defined at kickoff and finalized on task 8).

Responsible: Contractor, HSA leadership team to approve final deliverables (plan and toolkit as described below and refined on task 8).

Deliverables: a) Final internal communications plan, and b) Standard internal communications toolkit - Specific deliverables will be defined at the kick off meeting and refined once the initial draft of the communications plan is delivered (task 8). However, some suggested deliverables for this toolkit are:

- Internal communications guidelines (do's and don'ts)
- Example of internal emailer or online internal newsletter (1)
- Example of print communication (1)
- Example of some imagery/tone/voice to use for internal communications
- Example of landing page for intranet (1) or content

V. Key Deliverables, Delivery Dates and Estimated Project Timeline

The deliverables per task are summarized on this list:

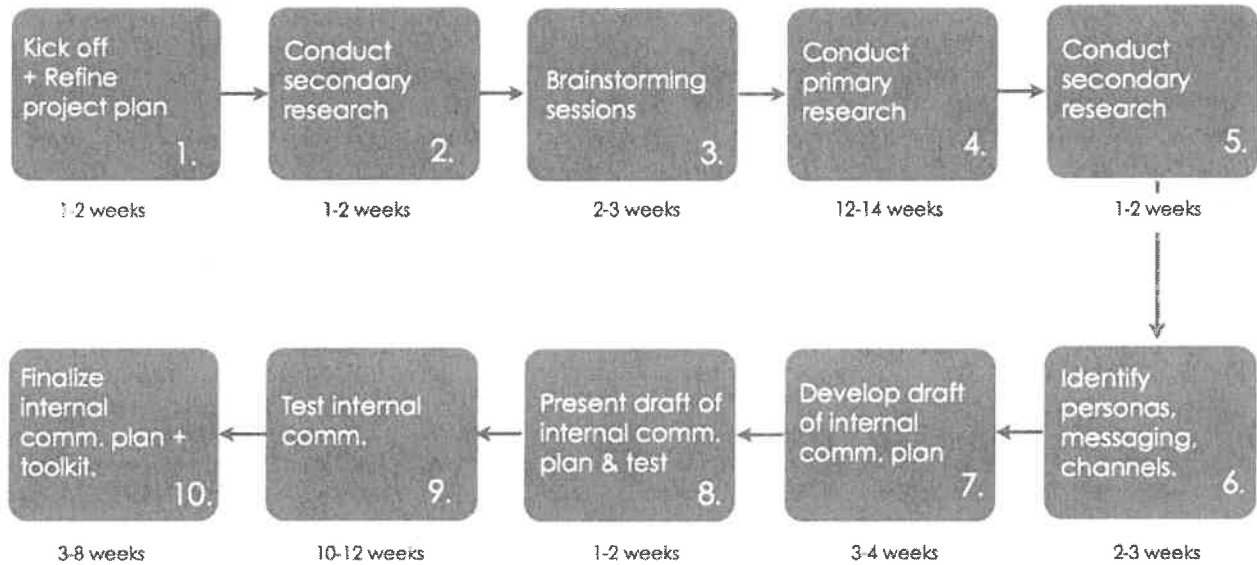
Tasks	Deliverables	Est. Delivery Dates
Task 1 - Kick off meeting, Refine project plan	Kick off meeting Refined project plan	Oct 1-15, 2018 1-2 weeks
Task 2 - Conduct secondary research	Review staff survey (2015) Observation of staff meeting + site visit. Summary of takeaways from secondary research	Oct 15-29, 2018 1-2 weeks
Task 3 - Brainstorming sessions with internal audience	Hold 3 brainstorming sessions (10-12 ppl. each) Summary of insights from sessions	Oct 29-Nov 19, 2018 2-3 weeks
Task 4 - Conduct primary research	Online survey (max. 20 questions) 12-18 interviews 1 focus groups/session (10-12 people) Summary of primary research. Presentation of research results to HSA team	Nov 19-Mar 18, 2019* 12-14 weeks
Task 5 - Conduct secondary research	Inventory of current main communications	Mar 18 - Apr 1, 2019 1-2 weeks
Task 6 - Identify “personas”, messaging and channels	Summary of personas profile and communication strategy for each	Apr 1-22, 2019 2-3 weeks
Task 7 - Draft of internal communications plan	Draft of internal communications plan	Apr 22-May 20, 2019 3-4 weeks
Task 8 - Present plan and recommendations	Present draft of internal communications plan Refined scope & tests to be done on task 9 Refine toolkit deliverables for task 10	May 20-Jun 3, 2019 1-2 weeks

Task 9 - Test internal communications channels/tools	<p>Test 2-4 of the suggested channels/tools on the initial internal communications plan. This may include an (1) email or e-newsletter to all personnel or an specific group, a (1) landing page with related content on the intranet, and (1-2) printed examples of other communications (to be tested with a smaller group of 10-12). *The specific channels/tools to test as well as the concepts/themes will be defined on Task 8 with your team.</p>	<p>Jun3 - Aug 26, 2019 10-12 weeks</p>
Task 10 - Finalize internal communications plan	<p>Final internal communications plan. Standard internal communications toolkit - Specific deliverables will be defined at the kick off meeting and refined once the initial draft of the communications plan is delivered (task 7). However, some suggested deliverables for this toolkit are:</p> <ul style="list-style-type: none"> - Internal communications guidelines (do's and don'ts) - Example of internal emailer or online internal newsletter (1) - Example of a print communication (1) - Example of some imagery/tone/voice to use for internal communications - Example of landing page for intranet (1) or content/messaging for intranet. 	<p>Aug 26-Sep 30, 2019 3-8 weeks</p>

*This week we would be facing some of the holiday season, which would delay the project by 2-3 weeks. This is reflected in the current estimate.

Based on these estimates the project would be finalized between July 29 and September 30, 2019 (in 9-12 months).

estimated project timeline



Appendix B - Calculation of Charges Development of an Internal Communications Plan

- I. The contract term for the Internal Communications Plan under this Agreement will begin effective October 1, 2018 and end September 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 **832 to 943** hours during the term of the Agreement.
- III. Total contract amount for the month period of October 1, 2018 through September 30, 2019 is not to exceed \$90,000. This amount includes \$2,400 in Other Direct Costs (ODC) in allowable project expenses as identified in the project budget.
- IV. Contractor shall submit invoices upon completion of tasks/deliverables as outlined in Appendix A Section IV and Attachment 1 of Appendix B. Invoices shall document the number of hours spent on the associated deliverable/task outlined in Appendix A and Attachment 1 of Appendix B, 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.
- 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 Development of an Internal Communications Plan

Contractor will be paid based on completion of these deliverables. Payments are based on estimated costs including hourly rates and materials ties to activities under each deliverable. The costs presented on these tables, include all the tasks, services, and activities covered on the work plan and the deliverables highlighted for this project.

Tasks/Deliverables	Cost to be billed upon completion of the Deliverables	Est. Delivery Dates
1. Kick off + Refined project plan	\$0	Oct 1-15, 2018 1-2 weeks
3. Brainstorming sessions Three brainstorming sessions Summary of brainstorming sessions (pres. pdf)	\$11,600-\$12,000 (3 sessions)	Oct 29-Nov 19, 2018 2-3 weeks
4. Primary research Online survey (20 Q) 12-18 interviews One focus group/session Research summary (pres. pdf) Presentation of results (inperson)	\$15,300 - \$16,200 (1 focus group)	Nov 19-Mar 18, 2019* 12-14 weeks
2, 5. Secondary research Review staff survey (2015) Observation + site visit Key research takeaways Inventory of current main communications (pdf)	\$6,300 - \$6,500	Oct 15-29, 2018 1-2 weeks Mar 18 - Apr 1, 2019 1-2 weeks
6. Identify “personas”, messaging and channels Summary of personas and comm. strategy	\$7,200 - \$8,100	Apr 1-22, 2019 2-3 weeks
7. Draft of internal communications plan	\$16,000 - \$18,000	Apr 22-May 20, 2019 (3-4 weeks)
8. Present plan and recommendations Refined scope & tests T9 Finalized toolkit deliverables - T10	\$4,000	May 20-Jun 3, 2019 1-2 weeks

Deliverables	Cost to be billed upon completion of the Deliverables	Est. Delivery Dates
<p>9. Test internal communications channels/tools Test 2-4 of the suggested channels/tools on the initial internal communications plan: (1) email or e-newsletter to all personnel or an specific group, a (1) landing page with related content on the intranet, and (1-2) printed examples of other communications (to be tested with a smaller group-10-12). *The specific channels/tools to test as well as the concepts/themes will be defined on Task 8 with your team.</p>	\$8,100 - \$10,800	Jun 3-Aug 26, 2019 10-12 weeks
<p>10. Finalize internal communications plan Final internal communications plan (pdf) Standard internal communications toolkit (pdf) - Specific deliverables will be defined at the kick off meeting and refined once the initial draft of the communications plan is delivered (task 8). However, some suggested deliverables for this toolkit are: - Internal communications guidelines (do's and don'ts) - Example of internal emailer or online internal newsletter (1) - Example of print communication (1) - Example of some imagery/tone/voice to use for internal communications - Example of landing page for intranet (1) or content/messaging for intranet.</p>	\$9,000 - \$12,000	Aug 26-Oct 21, 2019 3-8 weeks
Total Project Costs	\$77,500 - \$87,600	
Other Direct Costs**	\$2,000 - \$2,400	As needed; billed monthly
Total Project Costs (A) + Direct Costs	\$79,500 - \$90,000	

*Contractor considering 4 hrs. for project management per month in this budget.

Contractor needs to consider other direct costs for the execution of this project. These are just estimated expenses. For all of these costs, Contractor will ask for approval to the HSA team prior to purchasing the items. Once approved, Contractor will provide a receipt (or multiple receipts) for reimbursement and payment of these items. The detail for these direct costs is included in **Table A on the next page.

Total Budget: \$79,500 - \$90,000

Contract Period: October 1, 2018 to October 21, 2019

Payments will be made preferably each month for project management hours and against deliverables for each of the tasks outlined in Appendix A, Section IV and Attachment 1 of Appendix B.

Any extra work, or out of scope work, will have to be approved and authorized by HSA's Program Team in writing. No expenses or cost increases will be applied without approval. As Contractor executes this project, if there are any changes in the scope of the project, Contractor will discuss it with HSA's Program team, so both parties can mutually agree to the adjusted Scope of Work. The Scope of Work will detail the mutually agreed number of hours and ongoing rate for this part of the project. A Change of Scope document will be drawn up to reflect the change, adjustments to pricing and/or schedule, and will be signed by both parties.

For the staff hours per task and deliverable, as well as the itemized cost for each of the tasks/deliverables specified Attachment 1 of Appendix B, please refer to Attachment 2 of Appendix B.

Table A - Other Direct Costs - Detailed

Project phase	Item	Cost (US dollars)
3. Brainstorming sessions with internal audiences Team: Gimena, Paul	Lunch for 3 brainstorming sessions for 10-12 people each.	\$400-\$450
4. Conduct primary research Team: Gimena, Deidra	Incentives for online survey (Raffle of gift cards to respondents)	\$1,000
	Incentives for interview (Starbucks gift card or similar - 18 max.)	\$100-\$180
	Lunch for focus group session (10-12 people).	\$120-\$200
8. Present plan and recommendations. Gather feedback, refine plan/tests. Team: Gimena, Paul, Glenn	Lunch for presentation (1 sessions 15-18 people).	\$180-\$250
9. Test internal communications strategies Team: Gimena, Deidra	Incentives for test group (Starbucks gift card or similar - 12 max.)	\$80-\$120
	Lunch for group session (1 session 10-12 people).	\$120-\$200
TOTAL		\$2,000 - \$2,400

Attachment 2 to Appendix B - Project Fee Schedule Internal Communications Plan

Tasks	Rates \$/hr.	Team Members					Payment Table			FY 18-19 Deliverable	
		Gimena	Paul	Deidra	Glenn	Robin	Total hrs.	Est. Cost*	Fee Schedule		ODC
1. Kick off + Refined project plan		8-10	8-10				16-20	*no cost	\$0	-	\$0
3. Brainstorming sessions 3 brainstorming sessions Summary of sessions		58-60	58-60				116-120	\$11,600-\$12,000	\$11,600-\$12,000	\$400-\$450	\$12,000-\$12,450
4. Primary research Online survey (20 Q) 12-18 inperson interviews 2 focus groups/sessions Summary research Presentation of results		26-27	25-27	119-126			170-180	\$15,300-\$16,200	\$15,300-\$16,200	\$1220-\$1380	\$16,520-\$17,580
2, 5. Secondary research Review staff survey (2015) Observation + site visit Key research takeaways Inventory of current main communications		21-22	14	35-37			70-73	\$6,300-\$6,500	\$6,300-\$6,500	-	\$6,300-\$6,500
6. Identify "personas", messaging and channels Summary of personas and comm. Strategy		39-43	38-43	3-4			80-90	\$7,200-\$8,100	\$7,200-\$8,100	-	\$7,200-\$8,100
7. Draft of internal communications plan		48-54	48-54		40-45	24-27	160-180	\$16,000-\$18,000	\$16,000-\$18,000	-	\$16,000-\$18,000
8. Present plan and recommendations Refined scope & tests T9 Finalized toolkit deliverables - T10		20	20				40	\$4,000	\$4,000	\$180-\$250	\$4,180-\$4,250
9. Test internal communications channels/tools Test 3-5 of the suggested channels/tools. This may include (1) email to all personnel, (1) newsletter to all personnel or an specific group, (1) landing page, (2) printed examples of other comms. *The specific channels/tools to test will be defined on T8.		18-24	8-10	0-10	36-40	28-36	90-120	\$8,100-\$10,800	\$8,100-\$10,800	\$200-\$320	\$8,300-\$11,120
10. Finalize internal communications plan Final internal communications plan (pdf) Internal communications toolkit (pdf) - Specific deliverables to be defined at the kick off and finalized on T8. Some suggested deliverables are: Internal communications guidelines (do's and don'ts) Example of internal emailer (1-2) Example of internal newsletter (1) Example of brochure for internal use (1-2) Example of poster for common areas (1) Example of postcard or other printed material (1-2) Example of landing page for intranet (1) Example of content/messaging for intranet (1-2)		22-30	22-30		28-36	18-24	90-120	\$9,000-\$12,000	\$9,000-\$12,000	-	\$9,000-\$12,000
Labor Total + ODC		260-290	241-268	157-177	104-121	70-87	832-943	\$77,500-\$87,600	\$77,500-\$87,600	\$2,000-\$2,400	\$79,500-\$90,000

Other Direct Costs (ODC)

Lunch for 3 brainstorming sessions (10-12 each)	\$400-\$450
Incentives for online survey (Raffle for gift cards)	\$1,000
Incentives for interview (Starbucks gift card or similar 18)	\$100-\$180
Lunch for focus group session (10-12)	\$120-\$200
Lunch for presentation (1 session 15-18 people)	\$180-\$250
Incentives for test group (Starbucks gift card or similar - max 12)	\$80-\$120
Lunch for presentation (1 session 10-12 people)	\$120-\$200
Total for ODC	\$2,000-\$2,400
ESTIMATED TOTAL COST	\$79,500 - \$90,000

*Estimated costs are based on the average rate per hour of the team members.