

Rebranding BWC

2018-2020 Strategic Plan **External Communications Workgroup**

August 2018



**Bureau of Workers'
Compensation**

Governor John R. Kasich
Administrator/CEO Sarah D. Morrison

2018-2020 Strategic Plan

External Communications Workgroup

Purpose: To explore BWC’s brand and “corporate” identity from an external perspective. How do we want to be thought of by people and organizations who have an interest in Ohio’s workers’ compensation system?

Team Members: Bob Braun Shawn Crosby Tony Gottschlich
Sarah Huffman Susan Murnane Brian Wilson

Board Liaison: Chan Cochran

Leadership Liaison: Maria Rossi-Cook

Key Points: Our Vision is to be a world-class insurance carrier and the catalyst for a safe, healthy, and prosperous Ohio.

Our strategies and goals are evolving to live up to this Vision.

We are leaders and experts in workplace safety. We’re adding goals to include health and wellness, both in and out of the workplace.

Our brand doesn’t reflect who we are, what we do, and what we aspire to be.

Background

The inspiration for this work began with a Senior Leadership retreat in early 2018. Leaders developed the 2018 – 2020 Strategic Plan (Appendix 1), which includes a Vision Statement, reinforcement of the current Mission, five core Values, and six Strategic Goals. At the heart of this is our desire to build a world-class organization. We care deeply about injured workers, employers, and providers and we want to contribute each day to making Ohio prosper.

The Communications and Outreach strategic goal states: *“Elevate communications and outreach to support operations, strengthen customer and partner relationships, and advance the strategic plan.”* Our workgroup, External Communications, was initially charged with developing a list of new organizational names for consideration by leadership and the Board of Directors.

Recognizing that our name is just one element of how we are perceived, the objective of our workgroup is to gain an understanding of how BWC is viewed externally and then provide a recommendation about improving the brand identity of the organization.

It’s also important to note that while our charge does not include the development or implementation of brand strategies, we understand there will be challenges and costs around that effort if leadership chooses to move forward. This will be a significant undertaking and it’s one we believe the organization can achieve best from a position of strength like the one we currently enjoy.

Our Process

We met six times between June and August. Each meeting was focused on a specific objective, so it was fast-paced, creative, and deliberately challenging to individual biases. We worked hard to approach the scope of our work from an external perspective.

At the early meetings, we built a foundation for understanding whether rebranding is necessary. We completed an analysis of our strengths, weaknesses, opportunities, and threats (SWOT), solicited and shared perceptions of BWC from external sources, and each group member presented a one-minute elevator speech on why we shouldn’t change.

We concluded that rebranding is essential to the overall goal of achieving world-class status as an organization. Thus, our work shifted to identifying the key reasons to support a new brand identity and the remaining meetings focused on building those arguments.

As a creative exercise, each member brought a new name idea to each meeting. In our final session we evaluated each idea and discussed characteristics of a name that are critical to consider:

- Does it convey what we do?
- Does it convey a sense of mission, commitment and helping others?
- Does it convey a sense of movement, forward motion and progress?

Analysis – where we are today

Mentioned above is an exercise that we conducted in our first session. Each member was asked to solicit feedback from three people outside of the organization regarding their perception of BWC. The results set the tone for our eventual recommendation. Of the 19 comments, perceptions of 10 were unfavorable, five were favorable, and four were neutral. While this data wasn't gathered scientifically, it is still troubling on an anecdotal basis that twice as many people had an unfavorable view of the agency than a favorable or neutral view, even in the wake of \$8 billion in rebates and savings to the people of this state over the last seven years.

We have an opportunity to bridge the gap between the good we are accomplishing and the public's understanding of those accomplishments. An effective branding strategy, executed consistently over the long-term, is one way to bridge the gap.

Five Reasons We Should Rebrand

The workgroup was thoughtful about the charge we were given. There are good arguments to keep on the current path and we debated these thoroughly. We have made significant strides in how we conduct business to the clear benefit of injured workers, employers, and providers. Implementing a new branding strategy is disruptive and must be sustained over the long term to be effective. Internal communication, employee engagement, and culture will need to adapt.

However, we believe progress is the right path to choose and we are recommending that BWC pursue a branding strategy that helps achieve the vision of being a people-first, world-class insurance carrier.

Here's why we should rebrand:

Our name doesn't reflect who we are, what we do, or what we want to become. Our name signals that we're a government bureaucracy that pays money to workers. It's the first impression that forms perceptions. A new name would bring attention to our mission of caring for others and convey a sense of action and progress on safety, prevention, health, and wellness.

We must provide Ohioans with what they expect and deserve. Like every public and private business enterprise, we can't be successful without the necessary "buy-in" from those we serve. We need to capture their hearts and minds and make them believe in us and make them believe their best interests are at the center of everything we do. In addition, if our constant refrain is "world class insurance carrier," we must give Ohioans the world-class service they expect and deserve. Brand identity sets the tone and culture for how we conduct every aspect of our business.

Progress is optimal when done from a position of strength. We are in an ideal position right now to rebrand. Financially and operationally, this is a great moment in the history of our organization. There has never been a better time to take advantage of the opportunity to build on our success.

We have a duty and responsibility to lead. Successful organizations do not stand still, they lead. World class organizations adapt quickly to changes in the external environment to ensure the smooth continuity of their mission. As a top-20 workers' comp carrier and one of only four monopolistic systems in the country, BWC is in a unique position to lead. We have data, expertise, knowledge, and skills, and it's our responsibility to leverage those for the benefit of our stakeholders. Rebranding signals our intent to lead.

A modern, mission-oriented rebranding will be a significant help in recruiting the workforce of the future, starting with the generation called “Millennials” now entering the workforce. As a group, they seek employment that they believe serves others and makes the world better. BWC has long done both, and it’s time that it’s reflected in our branding.

Moving forward signals willingness to grow and evolve. Rebranding demonstrates to our employees and the public that we are moving forward, and we’re determined to define our story, rather than have it defined for us. Branding binds the elements of the Strategic Plan. Specifically, an effective brand strategy supports building an innovative culture and provides a landmark for modernizing technology. And as our employee demographics evolve in the next few years, the brand will help attract talented millennials to our organization.

Recommendation

The work of our team provides a clear path to recommend that Senior Leadership and the Board of Directors pursue a robust, long-term rebranding strategy that includes a new name, taglines and slogans, brand identification, and visual identity packaging (logos, colors, style guides).

Inspiration

Appendix 2 is a July 2016 RFP from the California Plug-In Electric Vehicle Collaborative (www.pevcollaborative.org). This RFP served as a roadmap for our team. It’s clear that the mission, strategies and goals of the PEV Collaborative had evolved and that the brand needed to change as well. Just one year later, in August 2017, the PEV Collaborative became Veloz (www.veloz.org). We encourage you to visit the two websites for inspiration on how an organization can quickly and effectively rebrand itself.

Where do we go from here?

The workgroup believes and recommends that a firm with branding expertise be engaged to complete the complex and specialized work of rebranding, and that a timeline be established for completion of this work late in the current year. In that way, appropriate recommendations will be in place as the Bureau experiences new leadership both in the Administrator’s office and the Governor’s office at the beginning of next year. The workgroup stands ready to be a resource both to management and to the selected contractor during this process.

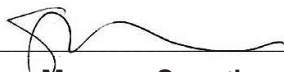
We appreciate the opportunity to serve on this workgroup, and we’re excited to recommend rebranding our organization.



Bob Braun, Strategic Direction



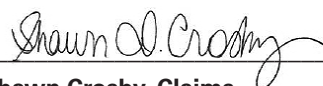
Tony Gottschlich, Communications



Susan Murnane, Operations



Chan Cochran, Board Liaison



Shawn Crosby, Claims



Sarah Huffman, Legal



Brian Wilson, Medical

Strategic Plan Framework 2018-2020

Vision To be a world-class insurance carrier and the catalyst for a safe, healthy, and prosperous Ohio.				
Mission To protect Ohio's workers and employers through the prevention, care and management of workplace injuries and illnesses at fair rates.				
Values				
Integrity	Courage	Stewardship	Service Excellence	Caring





REQUEST FOR PROPOSAL

Name creation, brand strategy and identity package
for a new electric vehicle nonprofit organization

Release date: July 26, 2016

1. GOAL

California is a global leader in electric vehicle (EV) sales with more than 215,000 cars on the road. However, even though the current EV models have been marketed and sold for more than six years, awareness of the benefits and availability of EVs is low and must increase to meet California's aggressive goal of 1.5 million zero-emission vehicles on the road by 2025. This has propelled the PEV Collaborative to develop a new public-private partnership that will focus on launching a statewide campaign to increase awareness and accelerate sales of EVs in California.

The intent of this Request for Proposal (RFP) is to create an organization name, brand, and a comprehensive visual identity package in support of the new entity and its goals.

2. BACKGROUND AND PROJECT DESCRIPTION

The California Plug-In Electric Vehicle Collaborative (PEV Collaborative), created in 2010, is a public-private organization focused on accelerating the adoption of plug-in electric vehicles (PEVs) to meet California's economic, energy and environmental goals. Using the expertise of each member, the PEV Collaborative, **convenes**, **collaborates** and **communicates** on emerging PEV market trends and works to address challenges to enable a robust PEV market.

The PEV Collaborative membership (<http://www.pevcollaborative.org>) includes elected and appointed officials, automakers, utilities, infrastructure providers, government organizations, research universities, environmental organizations and others.

During its first five years, the PEV Collaborative primarily operated as a business-to-business entity with the primary consumer base being early EV adopters. In the last year, the organization has started to become more public facing with the goal of bringing EVs to the mainstream consumer market. The new entity's focus will work to **engage**, **educate**, **empower** and provide hand-on **experience**. With this in mind, the new entity must position itself as public-friendly and consumer-oriented with a focus on mainstream markets while continuing to maintain core values of **convene**, **collaborate** and **communicate**. The core focus will be on plug-in EVs in the early years, but a flexible approach is needed so the organization may later include other zero-emission vehicle technologies at its option.

In summer 2016, the PEV Collaborative is working to launch a new 501(c)3 entity. A new name, brand strategy and visual identity package are key to a successful launch of the new organization.

4. SCOPE OF WORK:

This RFP solicits interest from public relations firms, brand managers, marketing experts and similar specialists that would provide the following:

1. Facilitate the naming of the new entity to reflect the focus of the organization
2. Provide associated branding for the new organization
3. Create a visual identity package for the new organization, including a logo, and a style guide for its use

Task 1: Project Kickoff

The contractor will meet with PEV Collaborative staff and a select team of PEV Collaborative members in person or via teleconference to go over the project history, tasks, timeline and desired outcomes. Following the kick-off meeting, the contractor will work to finalize a detailed schedule that includes dates, tasks and responsible parties.

Task 2: Facilitate the Renaming of the Organization & Provide Final Recommendation

Using proven methods, facilitate the renaming of the PEV Collaborative with consideration of the organization's new consumer-facing focus and the continuance of the core values of the PEV Collaborative. Working with PEV Collaborative staff, the solicitation and documentation of feedback from select PEV Collaborative members and other stakeholders is key. It is expected that this would include a combination of in-person and teleconference meetings, and other feedback-gathering methods as recommended by the contractor.

Any organization names that are considered should be vetted to ensure they can be legally used and are not already registered by another entity.

A minimum of three (3) organization name recommendations should be presented to PEV Collaborative leadership, with a plan for coming to consensus on the final choice. Once that plan is approved, the contractor shall carry out the plan so that current members of the PEV Collaborative can successfully choose the final name of the organization.

Throughout this naming process, the contractor will take detailed meeting notes and provide updates on an agreed schedule to the PEV Collaborative contract manager. A

final executive-level recommendation should be presented in a document no more than two (2) pages in length for PEV Collaborative members.

Task 3: Brand the Organization

In conjunction with renaming the PEV Collaborative, facilitate and determine branding for the organization. In consultation with PEV Collaborative staff and member-leaders, determine how the organization would like to be perceived through its identity with the goal of moving its constituents to action. Put the entity's core values to paper, including brand purpose, personality and promise.

Through facilitation, work with PEV Collaborative members and staff to come to consensus on final branding. Make recommendations on what the organization can do to consistently reinforce its brand through its staff, members, contractors, supporters, interactions with others and communications strategies.

Prepare a one (1) page final report that succinctly and clearly lays out the organization's brand.

Task 4: Create a Visual Identity Package for the New Organization, Including Logo and Style Guide

Following the selection of the organization's name and delineating its brand, the contractor will create a complementary visual identity and logo package, including a guide for its consistent use. This task includes working with PEV Collaborative members and staff, and facilitating the selection of the final package.

A minimum of three (3) recommendations should be presented and should include:

- Logo in color, and a black and white version
- Letterhead and stationery system
- Color palette
- Font guidelines
- Social media icon and header set (specifically for Twitter and Facebook)
- Electronic newsletter masthead and footer
- Positioning statement
- Other associated visual elements

The contractor will facilitate the approval process and final selection of the visual identity package, logo and guide. With the final selection, the letterhead and logo should be created in JPEG and EPS formats for use with Microsoft Word, MailChimp and InDesign. All files should be provided in low- and high-resolution formats.

As a final report, the contractor will prepare and deliver the package in a format no longer than five (5) pages that delivers the final recommendation, why it was chosen and visually represents the key elements of the package. The associated use guidelines may be attached as an addendum.

Task 5: Approach and Process for Tasks 2, 3 and 4

Provide a plan for the approach and process to be taken for Tasks 2, 3 and 4. Recommend specific strategies, timelines and steps for how each task would be taken from concept to final decision-making and approval through consensus building.

4. CONTRACTOR QUALIFICATIONS:

The contractor should have the following skills:

4. Experience naming new organizations.
5. Successful brand management for organizations.
6. Creative portfolio of visual identity packages for organizations.
7. Verified methods of working with organization leaders to illicit focused feedback, consensus and decision-making.
8. Experience working with organizations of varying size and the ability to strategically communicate with organization leaders and stakeholders for maximum participation.
9. Understand target audiences and stakeholders that need to be engaged for EV sales in California.
10. Proven demonstration of strong organizational skills, reliability and follow-through.
11. Administrative strengths in meeting coordination, documentation and time management.
12. Strong ability to work with a team.
13. Track record of delivering tasks with a top-tier quality, on time and within the agreed budget.

5. SUBMITTAL PROCESS, BUDGET AND TIMELINE

The PEV Collaborative has budgeted up to \$30,000 for this RFP. Services billed should not exceed the amount allocated the project. This includes all hard and soft budget expenses, including travel. The contractor will be paid in three (3) phases based on completion of the tasks described in the Scope of Work, minus a 10 percent holdback that will be paid upon completion of the final deliverables.

We are working on an expedited timeline and anticipate the entire project to span no more than eight (8) weeks. However, we expect the time required of the contractor should be somewhat flexible during this time period, reflecting the status of work required. The contractor will ensure that work is completed in a timely manner and does not get pushed to the end of the project. To this end, we will develop and monitor mutually agreed upon deadlines.

TIMELINE

- This RFP is dated July 26, 2016
- **Proposals are due no later than 5:00 p.m. (PDT) August 9, 2016**, to gpaauwe@pevcollaborative.org
- Questions should be submitted in writing to gpaauwe@pevcollaborative.org
Responses will be posted on the PEV Collaborative website at www.PEVCollaborative.org no later than close of business three (3) workdays after questions are received. No questions will be accepted after 5 p.m. (PDT) on August 3, 2016.
- The PEV Collaborative, at its option, may interview bidders. The interviews will be for the purpose of clarifying the proposals. Interviews may involve a presentation or a question-and-answer format or any combination of these.

PROPOSAL REQUIREMENTS

The completed proposal must contain the following information:

- Proposals must be no more than six (6) single-sided pages in length
- Cover letter
- Statement of work outlining how contractor will fulfill each task, including any subcontractors and staff
- Team members and roles
- Primary contractor and subcontractor qualifications and experiences
- Proposed initial schedule
- Cost proposal
- Proposals should include hourly rates and an estimate of how many hours the contractor or other personnel will spend to complete this project between August 12 and October 14, 2016
- References

PROPOSAL REVIEW PROCESS

A review committee will evaluate proposals for each project based on the following criteria and weighting:

100 total points possible:

- 20 Understanding the problem
- 20 Approach to completing each task
- 20 Contractor qualifications
- 20 Previous experience
- 20 Cost

6. CONTACTS

- The primary contact is Gennet Paauwe, Communications Advisor – gpaauwe@pevcollaborative.org



- The secondary contact is Josh Boone, Deputy Executive Director – jboone@pevcollaborative.org