

Request for Expression of Interest

Public Employees Benefits Agency (PEBA) Advertising Services Competition

August 15, 2022

PEBA is seeking an experienced advertising agency to develop a brand strategy, visual identity and integrated marketing and social media strategy as it transitions from a Government of Saskatchewan agency to a non-profit corporation (NPC).

PEBA administers pensions plans and benefits programs for a wide range of public employers. PEBA serves more than 900 employers and 100,000 members and manages \$15 billion in pension assets. PEBA is known in the Canadian pension industry for its innovation in delivering balanced and diversified defined contribution (DC) pension products and services. PEBA manages 12 pension plans, including the Public Employees Pension Plan (PEPP) for employees of the Government of Saskatchewan, provincial Crown corporations, Sask Polytech and others, and the Municipal Employees' Pension Plan (MEPP) for employees of school divisions, municipal and other local government employers.

PEPP is Canada's largest DC plan, and MEPP is a top 100 defined benefits (DB) plan. PEBA currently reports to the PEPP Board, the MEPP Commission and the Government of Saskatchewan through the Ministry of Finance. After the transition to an NPC, expected in early 2024, PEBA will report directly to a new NPC board of directors.

PEBA is accountable to the PEPP Board and MEPP Commission, both of which will approve the awarding of this contract. The organization's 2022-2025 strategic plan focuses on three goals: 1) transition PEBA to a NPC; 2) deliver on Board and Commission strategic priorities including execution of a member/stakeholder engagement strategy; and 3) transition to become a paperless organization.

PEBA is seeking an advertising agency to assist in the development of a brand strategy and visual identity to support the transition to an NPC. This will include the following elements:

- Marketing research;
- Development of a brand strategy;
- Development of a name, logo, visual identity (VI), and VI guide for the NPC;
- Strategy to align the new brand and VI with existing brands/VI of PEPP and MEPP;
- Development of brand templates for:
 - PEBA, PEPP and MEPP websites;
 - PEBA social channels;
 - PEPP and MEPP member newsletters (print and electronic);
 - Pension plan and benefits booklets (electronic).
- Assistance in developing a social media strategy to support the new NPC, PEPP and MEPP; and
- Assistance in developing a marketing/communication plan to announce the new NPC.

Interested suppliers must demonstrate professional experience in:

- Developing brand strategies and visual identities for private-sector companies, preferably in the financial services sector; and
- Marketing programs/services that include digital and social aspects.

The successful supplier will also demonstrate:

- Effective creative able to communicate complex financial messages to audiences with varying levels of financial literacy;
- Strong market research skills and customer segmentation/journey mapping experience; and
- Strong communication skills and solid account management.

The account is for a one-year period with the opportunity to renew for two additional one-year terms. Any renewal will be subject to yearly client/supplier evaluations and mutual agreement.

If you are interested in this opportunity, please submit a brief letter of intent (not exceeding three pages). The letter should specifically articulate why your experience and capabilities relative to the criteria above make your firm the best choice for this account. Please include two client references who can speak to your ability in the criteria above (can be on a separate page). Also, bidding firms must identify any intent to use subcontractors, and include a description of the scope of services. From the responses, a shortlist of three to four firms will be developed. Shortlisted firms will be emailed a complete Request for Proposals document and will be asked to submit a proposal by September 30. They may then be asked to demonstrate their capability in an in-person presentation in Regina to a selection panel. (Virtual presentations are an option.)

Bidding suppliers must immediately disclose to PEBA any actual or potential conflict of interest which currently exists or which may arise during the period of the competition. Letters of intent should be marked Public Employees Benefits Agency Advertising Services Competition and must be received by email to pamela.bristol@peba.gov.sk.ca no later than **12 noon, August 31, 2022**, Saskatchewan time.