



**REQUEST FOR PROPOSAL (RFP)
Brand Assessment and Rebrand/Refresh Strategy Recommendation**

Monarch is seeking a full-service advertising agency or brand management firm to assess the company’s current brand equity, current effectiveness, impact and image and provide specific recommendations regarding its brand and alignment with strategic goals, objectives and future plans.

As part of its recently developed 5-year strategic plan, Monarch is seeking to diversify its payer mix, extend its footprint further beyond North Carolina and Rhode Island and expand its service array to include primary care soon. Its brand identity will be key at this phase of the company’s evolution.

As the first phase of an overall branding project, this project will include the review of current brand standards, messaging and collateral, internal and external brand perceptions and Monarch’s current strategic direction in order to provide appropriate recommendations for brand refresh, rebrand or other modifications deemed necessary to help Monarch meet its mission and expand its presence as a multi-state provider and leader in the behavioral health care and developmental disabilities sectors.

Included below is an RFP for those available and able to conduct the scope of work. All proposals will be carefully reviewed and evaluated based on the criteria noted. The initial Scope of Work contained within this RFP will be approximately March 1, 2025 to June 30, 2025. The first contract may be adjusted depending on the date of completion of this RFP.

****PLEASE NOTE:** *A separate RFP will be issued to implement the changes recommended in this phase of the project. This RFP does not seek development of visual elements, messaging or brand expression at this time.* **

Any questions you may have to clarify this RFP are due to Monarch no later than 5 p.m. EST, Wednesday, January 15, 2024. Responses are due to Monarch no later than 5 p.m. EST on Friday, January 31, 2025, submitted via email to PR@Monarchnc.org.

CONTENTS

ABOUT MONARCH2
SCOPE OF WORK / OBJECTIVES5
SCOPE OF WORK / DELIVERABLES.....5
AGENCY SELECTION CRITERIA6
BUDGET & TERM6
PROPOSAL STRUCTURE AND REQUIREMENTS7
SUBMISSIONS7
TIMELINE8

ABOUT MONARCH

With more than 65 years of service to the community, Monarch is a recognized 501(c)3 non-profit organization and is one of North Carolina's largest and most experienced mental health, substance use disorder and intellectual and developmental disability (I/DD) services providers, serving nearly 30,000 people each year. In early 2024, Monarch expanded services to Rhode Island, where it provides long-term services and supports for individuals with severe and persistent mental illness. Monarch maintains the Gold Seal of Approval® from The Joint Commission, the premier health care quality improvement and accrediting body in the nation.

Monarch's mission is to provide hope, promote wellness, and empower individuals and families impacted by mental illness, substance use disorders, intellectual and developmental disabilities and traumatic brain injury. We offer a comprehensive array of services in communities across North Carolina and in Rhode Island and are committed to serving high-need Medicaid, uninsured and underinsured populations.

Currently, Monarch's core mental health services include outpatient therapy services (in-person and virtual), psychiatric care, crisis services, intensive in-home services, peer support, supported employment services, mobile crisis services, community support teams, Assertive Community Treatment Team (ACTT) services, substance use disorder and recovery services.

Monarch has long provided virtual mental health services as part of our statewide telehealth network and those services were expanded rapidly and effectively during the coronavirus pandemic, ensuring that services were able to be provided uninterrupted during the crisis. Virtual services remain at high volume today and will continue to evolve.

Our long-standing services for people with I/DD include residential services, day programs, supported employment services in addition to a broad array of community support services.

Overall, Monarch operates 16 behavioral health outpatient clinics, one behavioral health urgent care center and two facility-based crisis centers across North Carolina and provides I/DD services at more than 100 locations including day/vocational programs, group homes and apartments. We operate one 9-bed residential facility in Rhode Island. Monarch is also involved in an extensive expansion of services in partnership with Cabarrus County, NC that will add a 24-bed psychiatric residential treatment facility, a 16-bed child/adolescent facility-based crisis center and child/adult behavioral health urgent care services to our service array in the next two years.

In response to the call for whole-person care, we will also be adding primary care to our service array in the next 12 months.

Monarch was founded in 1958 in Stanly County, North Carolina, by a group of dedicated parents with children with developmental disabilities who were committed to ensuring services and education for their children and others at a time when those services were not guaranteed. Their work launched creative and innovative programs that continue today and shaped Monarch's longstanding position as a leading provider of services in North Carolina and beyond.

Monarch's story and additional information is available at MonarchNC.org.

Brand Positioning + Personality

Monarch's goal is to provide caring, compassionate services to individuals and families who need us, when they need us and where they need us. Our services have long been about meeting people where they are in their life's journey, whether that be facing the challenges of living with an I/DD or navigating a mental illness or substance use disorder and helping each person to find a path forward to achieve the goals that are important to them – as simple or as complex as those may be.

Through a variety of supportive behavioral health services and treatment options, our staff are trained to listen and to help. Our expertise, training and knowledge are combined with our commitment to caring for the people we support. We strive to be a trusted provider of critical health care services. Our brand identity is designed to convey those messages as we share information about our services and inspiring stories of success. A key challenge is extending that message effectively across an ever-evolving multi-state, multi-service environment.

Monarch has long been a trusted partner to North Carolina's Department of Health and Human Services (NC DHHS) and managed care organizations (MCOs) who manage Medicaid and state funding. We are often called upon to develop new services, partner in innovative opportunities or launch pilot projects, all of which we are proud to do. Of note in the last few years:

- In 2024, Monarch's executive leadership and Board of Directors completed a strategic planning process to focus on four key pillars/priorities including: Provider of Choice, Financial Strength, Employer of Choice and Growth and Innovation. This plan will provide the roadmap for the continued elevation of Monarch's services and the expansion in their delivery.
- In 2024, Monarch was awarded funding to launch foster care placement services in North Carolina, serving as an organization that will recruit and effectively train foster families, while providing a variety of wrap-around services for foster children.
- In 2024, at the request of the state government in Rhode Island, Monarch opened the state's first residential program to support individuals transitioning from long-term mental health hospitalization.
- In 2023, Monarch completed a merger with UMAR, a community provider of I/DD services, bringing those services into the Monarch family of programs. This expanded Monarch's footprint of I/DD services in Western North Carolina.
- In 2023, with grant support from the North Carolina Department of Health and Human Services, Monarch developed and launched an innovative curriculum called "Understanding Addiction" specifically designed to support individuals with I/DD who are also experiencing a substance use disorder. The curriculum is believed to be the first of its kind in the United States.
- In 2022, Monarch was selected to provide Care Management Agency services for behavioral health, I/DD and traumatic brain injury populations for all of North Carolina's six Tailored Plans. This service will launch in late 2022 and will be a primary marketing focus for us.
- In 2022, Monarch was selected by Trillium Health Resources to launch mobile integrated care (mental health and substance use disorder) services in Nash, Gates, Northampton and Halifax counties. Those services were expanded to include Hertford and Bertie counties in 2023.
- In 2021, Monarch was selected by Alliance Health as the provider in a care management pilot project in Wake County that supports the integration of physical and behavioral health.
- In 2020, in response to the coronavirus pandemic, Monarch quickly and effectively expanded its mental health services telehealth network to ensure continuity of care for patients

receiving services. In the first three months of response, Monarch saw a 600% increase in virtual services, safely providing services to people who needed them most.

- In 2019, Monarch opened the state's second Behavioral Health Urgent Care facility, providing immediate care for individuals ages four and older who are experiencing a mental health and substance use disorder crisis. Designed to alleviate pressure on emergency departments who are less equipped to appropriately address mental health crisis needs and connect individuals directly to ongoing community mental health support.
- In 2018, Monarch opened the state's very first Child and Adolescent Facility-Based Crisis Center in Charlotte.
- In 2018, Monarch was awarded North Carolina's first, and at the time only, \$3.2 million federal grant to establish a Certified Community Behavioral Health Clinic in Stanly County. Additional funding to extend the program for another two years was awarded in 2020.

As it looks to the future, Monarch seeks to continue to expand its network of care within and beyond North Carolina and assessment of current brand equity and brand identity is critical to the next phase of the company's development.

Target Markets and Audiences

Monarch focuses on four audience groups – 1) potential patients and their families seeking services, 2) patient referral sources, 3) community partners/donors/other key stakeholders and 4) prospective employees.

Monarch's primary target audience is **potential patients and their families** who may be seeking the services we provide. Monarch serves children, adolescents and adults, depending on the service and program. Services may be delivered on-site at Monarch, virtually, or in community-based settings and may be received individually or in groups.

Monarch receives **referrals** from thousands of sources across the state including fellow behavioral health providers, primary care physicians, hospitals, schools, departments of social services, health departments, police and emergency services departments, community-based social services agencies (i.e., food banks, housing organizations, etc.), faith-based organizations and many others. These relationships and an understanding of Monarch's brand and scope of services by these organizations is critical.

Other **key Monarch stakeholders** include families and caregivers of the people we support, the state's local management entities and managed care organizations (managing Medicaid and state funding for uninsured populations), preferred health plan insurers who provide physical health care to the North Carolina's Medicaid population, other private health care insurers and payors, donors, grant-making organizations, local, state and federal lawmakers, law enforcement and public agencies, and others.

Monarch continues to seek creative ways to attract highly qualified **prospective employees** at all levels of our organization. Positions include direct care, front line employees, administrative professionals and nurses and doctors. Like other organizations, Monarch has faced hiring challenges over the past several years with turnover and hiring challenges because of the pandemic and other societal factors. As we prepare to launch new services and expand our footprint in 2025 and beyond, human resources needs will continue to be a high priority. Monarch currently has a team of 1,600 full-, part-time and PRN employees.

Monarch's geographical footprint currently extends across 43 North Carolina counties where we have physical locations, and we serve individuals residing in 99 of North Carolina's 100 counties. We currently serve Rhode Island through one location. Our strategic plan includes development of selected services in new counties/locations and beyond North Carolina.

While Monarch serves urban, suburban and rural counties, the variety of services delivered in each county varies based on location and is determined by the payor sources in each community. For example, we may provide a day program for people with I/DD in one community, but not in another. The Monarch brand currently reaches a variety of communities and our identity as a company must be recognizable and resonate with a variety of audiences with a variety of needs. For example, in one rural community, we may be the sole provider of behavioral health services, while in a larger, urban area, we may be part of a very crowded marketplace.

While Monarch primarily serves Medicaid-eligible, uninsured or underinsured individuals, we do also accept a variety of private insurances and have made a concerted effort over the past five years to diversify insurance partners. Brand awareness and knowledge of Monarch's scope of services is critical in opening a pathway to that broader audience, and engaging both patients, the entities that refer them, and the insurance payers who support them.

Our Team

A 17-member Board of Directors and a 7-member Executive Leadership Team lead Monarch, with Peggy Terhune, Ph.D., MBA, OTR/L serving as Monarch's President and CEO. The Executive Leadership Team includes administrative and operational/clinical leadership. Monarch's Chief Strategy Officer oversees business development and the company's plan for strategic growth.

Monarch has a Marketing and Communications team charged with brand management and oversight. That team is responsible for the development and implementation of a strategic, comprehensive and effective marketing and communications program, designed to raise awareness, internally and externally, to foster a clear understanding about the people, programs, services and mission of Monarch. Monarch currently has an advertising agency of record that supports this work.

Monarch is committed to diversity, equity and inclusion, striving to ensure that all members of the organization, current and future, feel welcome and have an equal opportunity to connect, belong, and grow. It is expected that any agencies that Monarch works with hold the same values and commitment within their organizations.

SCOPE OF WORK / OBJECTIVES

This brand identity project is closely tied to Monarch's strategic plan and the company's vision for its future growth. The result of this scope of work is a data-driven recommendation about the status of Monarch's brand in the marketplace and future development of that brand. As such, the scope of work in this phase includes:

Evaluate Brand Perception: Understand how clients/patients, stakeholders and the broader public perceive our brand.

Assess Brand Equity: Analyze Monarch’s brand strengths and weaknesses and differentiation in the behavioral health / developmental disabilities services space.

Assess Brand Alignment with Mission: Ensure brand recommendations reflect our mission, vision and values and our unique position in the marketplace, and best represent our business objectives moving forward.

DELIVERABLES

1. Project plan and timeline, with key milestones identified.
2. Summary of stakeholder interviews, survey results and other data collected.
3. Competitive analysis report.
4. Brand assessment/audit findings.
5. Final report with recommendations that provide clear, direct answers to the following specific questions:
 - a. Is Monarch’s current brand effective and competitive within the marketplace?
 - b. If not, would a refreshing of the current Monarch brand (new logo, colors, brand package) support the company’s next phase of development and support business objectives?
 - c. If not, is there a need to rebrand Monarch completely (i.e., explore a name change) to support company expansion and growth in the healthcare marketplace?

AGENCY SELECTION CRITERIA

Agency selection will be based on the following criteria using the attached Evaluation Rubric (See Addendum):

- Successful history in brand assessment and development of recommendations for brand management or redevelopment as assessment warrants.
- Ability to deliver exceptional and innovative integrated work while strictly adhering to established milestones and key metrics of project.
- Experience in the health care industry, mental health/substance use disorder industry, and/or not-for-profit organizations.
- Demonstrable record of working with large with large statewide and/or multi-site organizations with complex and changing service lines on brand assessment, redevelopment and management.
- Capabilities in goal setting, strategic planning, client/agency communication and measurable outcomes with proven ability to turn research and insights into brand recommendations.
- Familiarity with Monarch’s brand and services and how this knowledge is integrated into the proposal.
- Fee/Cost proposal that is reasonable and appropriate for the SOW, providing maximum services in relation to fees charged.

BUDGET & TERM

Proposed project fees associated with this brand assessment and audit should not exceed \$30,000. This budget is expected to cover all expenses associated with this proposal (e.g., surveys, interviews, travel costs, etc.) unless specified in the proposal. The term of the agreement with the selected

agency will commence on or around March 1, 2025 and extend to June 30, 2025, based on agreed upon project timeline and final contract.

PROPOSAL STRUCTURE AND REQUIREMENTS

Please include the following sections and items within your proposal, with clarity and brevity in mind.

1. Company background and how your agency differentiates from others.
2. Company leadership and day-to-day account staff.
3. Initial ideas that demonstrate how your agency's experience and capabilities can address the previously outlined SOW and deliverables.
4. Sample brand analysis plan that illustrates how you would approach the work and timeline to be developed.
5. Account management procedures and how your agency balances strategic and tactical duties, including who will provide strategic leadership and who the main point of contact will be.
6. Current client list, including identifying any that might pose a conflict of interest with Monarch.
7. Three client references that your agency has worked with on brand analysis and development projects with the expectation that Monarch will contact agencies. Applicant agency understands that by providing references it is giving Monarch permission to contact said references.

SUBMISSIONS

All proposals should be submitted in a PDF format to PR@Monarchnc.org. Proposals must be received via email by 5 p.m. EST on Friday, January 31, 2025. Any proposals received after this time or via any other channels may be disqualified and deleted. Monarch does not take responsibility for any technical issues related to agency submissions or receipt confirmation.

Any questions related to the RFP must be sent to PR@Monarchnc.org and received no later than 5 p.m. EST on Wednesday, January 15, 2025. Questions will be addressed as quickly as possible and in the order they are received. Monarch will not take responsibility for the completeness or timeliness of answers.

Notifications will be made by Friday, February 7, 2025 notifying agencies whether there is a desire to move forward in the selection process with agency presentations, which will be held virtually via Teams or Zoom. Monarch will make its best efforts to ensure such emails are received but not take responsibility if for any reason they are not.

Agencies that are selected for virtual presentations will have the opportunity to submit questions prior to presenting and in person during Q&A portion of the presentation. Submitting agencies signify understanding and agreement with these terms by responding to the RFP and will adhere to the following terms:

- Do not contact any Monarch Board Member, staff member or members of the evaluation committee. Any contact with these individuals will automatically disqualify the agency. All inquiries must be sent to PR@Monarchnc.org.

- All ideas and concepts shared with Monarch in this RFP process are submitted in a non-proprietary manner. Presented ideas and concepts are available to use by Monarch without any liability and do not constitute a formal agreement nor requirement for compensation. Proposals will not be returned to submitting agencies.
- Monarch reserves the right to change any part of this RFP, the process and/or altogether cancel at any point and for any reason without any liability to submitting parties. Agencies understand that any information provided in a proposal that is found to be untruthful or otherwise a misrepresentation will automatically disqualify the submitting agency. In addition, should untruths or misrepresentation be found with the selected agency after contracting, such would be grounds for immediate termination of the contract without any liability from Monarch.
- All information (written or spoken) shared by Monarch during the RFP process, whether written or spoken, is deemed confidential and shall not be shared to third parties without express written consent.

TIMELINE

The following is the approximate timeline and process for agency solicitation, evaluation and selection. Monarch reserves the right to alter this timeline and will provide participating agencies notification of such adjustments.

- RFP distributed: Monday, January 6, 2025
- Agency questions deadline (via email only): Wednesday, January 15, 2025
- **RFP submission deadline: Friday, January 31, 2025**
- Agencies notified of selection to move forward with presentations: Friday, February 7, 2025
- Virtual agency presentations: Between February 12 and February 19, 2025
- Final selection and agency notified: No later than February 28, 2025
- Contract development: Early March 2025
- Agency start date: on or before March 15, 2025

ADDENDUM

Scoring Rubric for Monarch's RFP for Brand Assessment and Recommendations

This scoring rubric is designed to evaluate proposals based on the criteria outlined in Monarch's **Brand Assessment and Rebrand/Refresh Strategy Recommendation Request for Proposals**. The proposals will be scored across multiple categories to ensure the selected agency can meet the needs outlined in the scope of work and objectives.

1. Agency Track Record and Experience

Maximum Points: 20

- **Criteria:** Demonstrated success in brand assessment, development, and recommendations for brand management. Relevant experience in behavioral health, mental health/substance use disorders, multi-location medical practices/providers, and/or non-profit organizations is crucial.
- **Key Considerations:**
 - Depth and relevance of experience in similar brand assessment projects.
 - Previous work with organizations of similar size and complexity.
 - Specific examples of past successes or challenges overcome.

Score	Description
18-20	Strong history of brand assessment and management, particularly in the healthcare or non-profit space with measurable outcomes.
13-17	Adequate experience in brand assessment with relevant work in healthcare or non-profit, but lacks clear evidence of outstanding results.
6-12	Some relevant experience, but lacks a strong track record in brand assessment.
0-5	Limited or no relevant experience.

2. Approach to Brand Assessment and Audit

Maximum Points: 15

- **Criteria:** Quality of the proposed plan for assessing Monarch's brand, including stakeholder interviews, surveys and competitive analysis. Ability to generate actionable insights based on research.
- **Key Considerations:**
 - Clarity and thoroughness of proposed methodology (interviews, surveys, competitive analysis).
 - Innovative approaches to data collection and analysis.
 - Alignment with the scope of work and deliverables.

Score	Description
14-15	Comprehensive and well-detailed plan with a clear and innovative approach to gathering data and providing actionable insights.
10-13	Clear plan with solid methodologies, but lacks some innovation or completeness.
5-9	Plan is basic or unclear; lacks a cohesive strategy for assessment.
0-4	Plan lacks sufficient detail or alignment with scope of work.

3. Experience with Complex, Multi-Site Organizations

Maximum Points: 15

- **Criteria:** Familiarity with managing brand strategy and recommendations for large, multi-state, multi-service organizations and brands in expansion across markets/states.
- **Key Considerations:**
 - Evidence of working with organizations of similar complexity (e.g., multiple locations, diverse services).
 - Ability to navigate and assess brands in diverse service areas.

Score	Description
14-15	Extensive experience with multi-site, multi-service organizations, showcasing relevant solutions.
10-13	Experience with multi-site organizations, but may lack some aspects of the complexity Monarch faces.
5-9	Limited experience with multi-site or complex organizations, but still relevant to the scope of work.
0-4	No experience with multi-site or complex organizations.

4. Brand Alignment with Mission and Strategic Goals

Maximum Points: 15

- **Criteria:** Understanding of Monarch's mission, vision, and values and how these will inform the brand assessment and recommendations.
- **Key Considerations:**
 - Clarity in linking brand recommendations to Monarch's strategic goals.
 - Understanding of how to align brand identity with mission and growth strategies.

Score	Description
14-15	Demonstrates a deep understanding of Monarch's mission, values, and strategic goals, with clear connections to the proposed work.

Score	Description
10-13	Solid understanding of Monarch's mission, but slightly lacking in how the recommendations will align with future growth.
5-9	Basic understanding of Monarch's mission, with limited connection to brand strategy.
0-4	Little to no understanding of Monarch's mission or strategic goals.

5. Innovation and Strategic Thinking

Maximum Points: 15

- **Criteria:** Ability to offer innovative solutions and strategic thinking beyond basic brand analysis.
- **Key Considerations:**
 - Novel or creative approaches to brand assessment and recommendations for a brand that is expanding its service array in a competitive health care market.
 - Vision for how Monarch can grow and evolve through brand strategy.

Score	Description
14-15	Highly innovative and strategic approach, demonstrating forward-thinking for Monarch's growth.
10-13	Good strategic thinking but may lack some innovation or creativity in approach.
5-9	Standard approaches with minimal new ideas or innovative thinking.
0-4	Limited or no strategic thinking and lack of creativity.

6. Proposed Budget and Cost-Effectiveness

Maximum Points: 10

- **Criteria:** Reasonability and alignment of the cost proposal with the scope of work, demonstrating value for the services provided.
- **Key Considerations:**
 - Clarity and transparency of the fee structure.
 - Appropriateness of the proposed fees in relation to deliverables and outcomes.

Score	Description
9-10	Clear, reasonable, and well-justified cost proposal aligned with the project scope.
6-8	Reasonable cost proposal, but could be more detailed or transparent.
3-5	Cost proposal is somewhat unclear or appears overpriced for the scope of work.
0-2	Cost proposal is not reasonable or lacks clarity.

7. Agency Team and Account Management

Maximum Points: 5

- **Criteria:** Qualifications and experience of the agency's leadership and team members, as well as the proposed account management structure.
- **Key Considerations:**
 - Qualifications and relevant experience of team members.
 - Clarity of the account management process and roles.

Score	Description
5	Highly qualified team with clear roles and strong agency leadership.
3-4	Good team qualifications and clear account management process.
1-2	Team qualifications are adequate but lacks clarity in account management.
0	Weak team qualifications and unclear management structure.

8. References and Client Portfolio

Maximum Points: 5

- **Criteria:** Strong references from similar brand analysis and development projects.
- **Key Considerations:**
 - Relevance and quality of references provided.
 - Agency's ability to deliver on commitments to past clients.

Score	Description
5	Strong, relevant references that support the agency's claims.
3-4	Solid references but with some less directly relevant examples.
1-2	References are weak or not highly relevant to the scope of work.
0	No relevant references provided.

Total Points: 100

This rubric is designed to provide a holistic evaluation of each proposal, balancing experience, approach, innovation, cost and alignment with Monarch's needs. Agencies that score higher in areas such as strategic thinking, innovation and alignment with the mission and goals will be better positioned to contribute meaningfully to the brand assessment and recommendations process.