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DECEMBER 18, 2017

AGENDA ITEM 11  
ACTION ITEM

CALIFORNIA SECURE CHOICE RETIREMENT SAVINGS INVESTMENT BOARD

*Resolution No. 2017-13: Adoption of Program Name, Logo, and other Branding Concepts*

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***Background***

At the July 24, 2017 California Secure Choice Retirement Savings Investment Board (“Board”) meeting, the Board generally supported hiring a California-based firm to assist the Board in evaluating the efficacy of the existing California Secure Choice Retirement Savings Program (“the Program”) name and alternative names, developing logos and other graphic design work, and conducting testing of those names and logos.

The Program entered into a contract with *Crescendo*, a marketing agency, to develop and test alternative names and logos for the Program. For this item, *Crescendo* staff will present the Board with the results of its work, including recommendations for alternative names for the Program, alternatives for logos, and the results of analysis and testing conducted to evaluate the names and logos.

***Attachments***

- *Crescendo* presentation
- Resolution No. 2017-13: Resolution to adopt an alternative name

**RESOLUTION NO. 2017-13**

**RESOLUTION OF THE CALIFORNIA SECURE CHOICE RETIREMENT SAVINGS INVESTMENT BOARD RELATING TO SELECTION OF PROGRAM NAME, LOGO, AND OTHER BRANDING CONCEPTS**

**WHEREAS**, the California Secure Choice Retirement Savings Investment Board (the “Board”) is established under Senate Bill 1234 (Chapter 734, 2012; codified under Government Code Section 100000 et seq.) and was mandated to conduct a market analysis to determine whether the necessary conditions for implementation of the California Secure Choice Retirement Savings Trust Act (the “Act”) can be met;

**WHEREAS**, Senate Bill 1234 (Chapter 804, 2016) expresses legislative approval of the California Secure Choice Retirement Savings Program (“Secure Choice” or “the Program”), requiring the Board to design and implement the Program;

**WHEREAS**, Government Code Section 100010(a)(1) provides the Board the power and authority to make and enter into contracts necessary for administration of the Trust;

**WHEREAS**, Government Code Section 100010(a)(2) provides the Board the power and authority to adopt a seal and change and amend it from time to time; and

**WHEREAS**, the Board entered into contract with RBG Marketing, Inc. dba Crescendo to assist it in evaluating alternative names for the program; develop logos, other graphic design work, and branding concepts; and to test and evaluate the efficacy of the brand in conveying meaning about the Program;

**NOW, THEREFORE, BE IT RESOLVED** that the Board has selected [program name] and the associated logo and branding concepts.

Attest: \_\_\_\_\_  
Chairperson

Date of Adoption: \_\_\_\_\_