

Request for Proposal for a Communications and Membership Engagement Audit

FOR THE NORTH AMERICAN CONFERENCE OF ASSOCIATES AND RELIGIOUS
(NACAR)

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Direct questions about the proposal or process to
Jeanne Connolly, President
NACAR Board of Directors
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Subject line: NACAR Communications RFP 2018

Introduction

Through this Request for Proposal (RFP), the North American Conference of Associates and Religious (NACAR) seeks a qualified consultant to conduct communications and membership engagement audit of all aspects, including software that impact NACAR's ability to communicate and engage current and prospective members.

The consultant will be responsible for reviewing and evaluating the effectiveness of the existing member database, communication software (e.g. Mailchimp, Joomla, etc.), and communication methods, taking into consideration the organization's strategic plan, membership needs, changing demographics, and trends in member development and engagement. The consultant will provide recommendations on communication tools and/or database; communication team structure; potential communication and member engagement initiatives, and budget to ensure NACAR's strategic service to its members. This will be done with a sensitivity and understanding of NACAR's limited financial resources. The Communications Consultant can be an Independent Contractor or a firm.

Background

The North American Conference of Associates and Religious (NACAR) is an inter-congregational professional membership organization created to support and promote the Associate way of life; to serve and support Associates and vowed members as Associates proclaim their call to live the charism of their religious congregation; and to support the professional and spiritual growth of its members and member communities.

History

Although lay involvement through third orders/oblates dates to the 12th century, the major growth in the *associate-religious* movement began in the early 1970's. In the early 1970's a movement was born within the Roman Catholic Church. God's Spirit was inspiring lay women and men to find ways to embrace and live the charisms of religious communities through formal relationships.

Lay associates are frequently defined as women and men who choose to make a public and formal commitment to embrace and live the mission and charism of a religious congregation within the associate's primary life vocation in society and in the church. Other names for this form of belonging to a religious community include, Affiliate, Co-journer, Companion, and Partner in Mission

By the 1980's, in response to the rapid growth of this new movement, leaders of some of these associate groups reached out to one another. They began to share how the Spirit was moving among them and to address mutual concerns. Eventually, the need to have an even wider forum emerged.

NACAR has continued to grow and today is a catalyst to serve, empower and promote the Associate-Religious relationship in all of its forms.

Organizational Structure

NACAR is incorporated in the United States, in the state of Illinois. It derives its tax-exempt status from its inclusion in the Official Catholic Directory (“Kenedy Directory”). Within the OCD, NACAR is listed as an organization within the Archdiocese of Chicago. The corporate address for NACAR is 5417 So Cornell, Chicago IL 60615. An Office of Member Relations is in Cincinnati, Ohio.

Under its Bylaws, NACAR is governed by an all-volunteer Board of Directors. The Board of Directors elects an Executive Committee, which includes a President, Vice President, Secretary, and Treasurer. The operations of the organization are also supported by several working committees. The NACAR Board of Directors contracts for some services such as office support and membership relations, website administration, publications, and accounting.

Forms Membership

NACAR offers different forms of membership to meet the needs of those we serve.

Community Membership - This membership comes with five to fifteen individual memberships depending on the size of the community. Fees are set on a sliding-scale based on the number of vowed members and associates in the community. Discounted individual memberships are offered to Associates and vowed members of member Community. As of April 1, 2018, one hundred twenty-five (125) communities held membership in NACAR.

Individual Membership – This membership provides an opportunity for someone who does not fall under a community membership to receive the benefits of NACAR membership. As of April 1, 2018, fifty-eight (58) individuals held membership in NACAR

Supporting Membership – This form of memberships is available to organizations and groups who are also working to support and/or advance the Associate-Religious movement. This membership highlights the work of the supporting organization on the NACAR website and in NACAR publications. As of April 1, 2018, five (5) organizations held supporting membership in NACAR

Currently, more than 1,000 “contacts” receive communication and membership information from NACAR.

Those We Serve

A 2015 study conducted by the Center for Applied Research in the Apostolate (CARA), identified more than 55,900 lay associates of the more that 370 religious institutes responding to the survey.

Overview of Membership Development and Communication Functions

Communication Committee: The purpose of the communications committee is to foster member outreach, communication and engagement by creating, coordinating and monitoring activities related to electronic newsletters/alerts, website, social media sites, and public relations. The communication committee is responsible for publishing *The Associate* e-magazine three times a year.

Marketing and Membership Development Committee: The purpose of the Marketing and Membership Development Committee is two-fold. First, it is to attract and retain members in NACAR by promoting NACAR benefits and services and second, to create awareness of the Associate-Religious relationship and build coalitions with like-minded organizations interested in furthering the Associate movement.

Web and Technology Consultant

1. Maintain the NACAR website and all related content; update regularly and back-up routinely.
2. Assure registrations (host and domain name) are up-to-date.
3. Post articles in a timely manner as received.
4. Provide tech support to members, Board and other users.
5. Report on statistics regarding usage of electronic media.
6. Update and maintain membership database.
7. Create and maintain any “nacar.org” email addresses or email distribution lists.
8. Assist with posting reports, surveys, videos, newsletters that support the membership of NACAR.
9. Guide and suggest NACAR Board and Committees in improvements to the website and its content.

Member Relations and Office Administration

1. Manage membership database and renewal cycles; prepare reports as requested.
2. Maintain a calendar and set up Board meetings.
3. Serve as a resource and support to the Board of Directors.
4. Take minutes and handle correspondence.
5. Make logistical arrangements for meetings, retreats, gatherings, and/or conferences.
6. Maintain financial record of sales; process billing and banking.
7. Prepare and send out e-mail newsletters and e-magazine.
8. Prepare, collate, and ship membership and meeting materials.
9. Respond by phone or e-mail to inquiries from members or other interested parties. Send out requested information, as appropriate.

Scope of Work

1. Review and evaluate the effectiveness of current NACAR communications practices, structure, and initiatives; such review to include internal and external communications, and quantitative and qualitative analysis

2. Review and evaluate NACAR's current communication and membership software (e.g., e-mail, website, and database software) including the impact on strategic membership and fund development; as well as member communication and engagement.
3. Review current communication vehicles such as website, Facebook, e-newsletter, e-magazine, and Leadership manual, to determine if these methods display consistency of design, are visually and aesthetically pleasing, and user friendly.
4. Identify potential solutions including, but not limited, to purchase of upgraded software, "staffing" and/or outsourcing taking into consideration NACAR's limited financial and human resources.
5. Identify potential barriers to implementation of recommendations including, but not limited to, financial, human resources; training and development needs.

Outcome and Performance Measures

A comprehensive assessment and sustainable plan for the improvement of the front end (visible to our members), and the back end (required for sustainability) of all means and methods of communication, resource delivery, and support offered to members.

Improved communication to, and access by, current/prospective members; and sustainable communication delivery systems (website, database, etc.).

Deliverable

1. A written plan that includes potential solutions and barriers to achieving the goal of enhanced communication and member engagement. The written plan should include recommendations for implementation of proposed solutions including the potential cost, timeline, human resource, and training resources necessary.
2. Participation at a Zoom or In-Person meeting of the Board of Directors to review the plan and respond to questions.

Project Budget

Funding for this strategic communication and membership engagement audit is available through grant funding. The budget range for a consultant is between \$10,000 and \$12,000 total.

Submission Process

NACAR is requesting that all Independent Contractors or firms submit a proposal including the following:

- Cover Letter that includes a summary of your response, indicating your interest in providing services to assist NACAR with the outlined project. Information about your organization and/or services offered, and any other information that you believe would assist NACAR in evaluating your proposal.
- A description of your experience conducting communication and/or membership engagement audits including samples of work.
- A description of your experience with small not-for profit faith-based organizations, particularly your experience working with Catholic religious communities and/or the associate-religious movement.
- A resume of the proposed consultant(s) working on this project.

- ❑ Three professional references with contact information (per firm)
- ❑ Your availability to attend to the project in the next 2 to 6 months.
- ❑ A proposed work plan with associated, project cost and timelines that will accomplish the tasks in the Scope of Services including:
 - A description of the financial, human, and other resources you need from NACAR to implement your work plan.
 - A narrative describing any changes or additions to the Scope of Services you would recommend for strengthening the overall goal
 - An indication of the methods you will use to engage stakeholders in this process

Proposal Submission

Please submit one digital copy of your proposal via email to info@nacar.org with a subject line - *NACAR Strategic Communications Audit RFP 2018*.

NACAR must receive the proposal submission by **Friday, July 20, 2018 at 4:30 p.m. Eastern Daylight time**. Consultants are solely responsible for ensuring the delivery of proposal submission by the proposal deadline. NACAR will not accept proposals after the submission deadline.

Qualifications of Consultants

NACAR will be the sole judge of the qualifications of all prospective Consultants and reserves the right to reject any proposal without recourse.

Confidential Information in Proposals

NACAR is aware that information contained in the proposal may contain sensitive or confidential information about the consultant's current operations. Consultants are responsible for identifying any proprietary or confidential information in their proposal. NACAR will confine use of this information to this RFP and will treat all Proposals and any attachments or enclosures as confidential.

RFP Response Contact

Consultants submitting a proposal shall designate a primary contact for receipt of all subsequent information regarding this RFP within the cover letter of the proposal.

Reimbursement

All costs and expenses incurred by a respondent for the preparation or presentation of its proposal shall be borne by the Consultant. NACAR is not liable to pay such costs or expenses, to reimburse or to compensate a Consultant under any circumstances.

Proposal Evaluation Process

NACAR will evaluate proposals using a framework that addresses experience, the work plan and approach, timeline for completion, and budget. NACAR will base its evaluation on the information contained in the submitted proposals, information from oral interviews, reference checks, and other pertinent factors at its sole discretion. NACAR reserves the right to disqualify bids that, in its opinion, do not demonstrate the expertise, experience, or adequate resources to complete the project requirements. NACAR will only review and evaluate complete RFP

submissions. During the evaluation process, NACAR may interview selected Consultants for additional information to obtain further clarification on their RFP responses.

Additional Conditions

NACAR reserves the right to modify any part of the RFP prior to the proposal submission deadline by issuance of one or more addenda, which will be available to all Consultants in the same manner as the original RFP.

All documents, including the proposal and any accompanying documentation provided by the Consultant shall become the property of NACAR and NACAR will not return the documents to the Consultant. The Consultant acknowledges that NACAR and its representatives are entitled to use and reproduce (for NACAR's internal purposes) the whole or any portions of the Proposal, notwithstanding any copyright or other intellectual property right.

The submission of a proposal is confidential. Consultants may not directly or indirectly, (i) publicly disclose that the Consultant has submitted a proposal; (ii) suggest to any party that it is or will be working with NACAR in any capacity, or (iii) use NACAR's name or logo, or communicate with the media in relation to this RFP.

The Consultant shall confirm as part of the proposal that it agrees to comply with all applicable federal, state, and municipal laws, regulations, codes, ordinances, policies, directives and orders, and to carry out its business in compliance with the highest professional standards prevailing in its industry on behalf of NACAR.

This RFP does not constitute an offer of any nature or kind whatsoever by NACAR to the Consultants. NACAR does not bind itself to accept any proposals and may proceed as it determines, in its sole discretion, following receipt of the proposals. NACAR reserves the right to accept any proposal completely or in part or to discuss with any respondent, different or additional terms to those envisaged in this RFP or in such respondent's proposal.

NACAR's Rights Relative to the RFP

- to cancel or terminate the RFP at any time without liability whatsoever to any respondent;
- to reject any or all the proposals;
- to accept any or all the proposals;
- if only one proposal is received, elect to accept or reject it;
- not to accept the lowest fixed fee amount;
- to alter the schedule; RFP process, procedures or objective of the project or any other aspect of the RFP, as it may determine in its sole and absolute discretion; or
- to negotiate with one or more Consultants to reach a final agreement for the services.