Request for Proposal

Organization: Council of Engineering and Scientific Society Executives (CESSE)
Website: www.cesse.org
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About CESSE

The Council of Engineering and Scientific Society Executives (CESSE) provides leadership development through networking, education and benchmarking for the professional leaders of science and engineering societies.

Engineering and scientific societies play a crucial role in the development of the professions that are key to advancing innovation. CESSE seeks to transform the future through science and engineering society leadership.

Incorporated in 1977, CESSE is a professional society of chief executive officers and mid- to senior-level staff members of scientific and engineering societies dedicated to leadership excellence.

CESSE offers its members a forum for exchanging information about their experiences and a venue for addressing the problems, challenges, and opportunities they face in operating their societies. CESSE's greatest resource is its members' wisdom and experience. CESSE members are known for their willingness to share their knowledge with colleagues.

Staff: 2 full-time, 4 part-time contractors
Members: approx. 1200 individual members
Organizations: 190 associations
Budget: $1 million
IRS Classification: 501c-3

Purpose:

The purpose of this RFP is to identify and select a marketing partner who are exceptional at writing, designing, editing, managing and developing strategy for multiple marketing projects which will help CESSE achieve its mission.

Ideally CESSE is looking for a partner that can become an extension of the CESSE team. CESSE would like to find one firm who can either handle all aspects of each project or will project manage other contractors or firms to handle specific aspects of projects outlined in the scope of work.

Proposal Inclusions

Please include the following information in your proposal:

- **About You/Your Company** – Please include background information about you, your company and any other team members or contractors working on CESSE projects.
- **Project management** – Please describe your process and the things you need to successfully manage CESSE's projects.
- **Work philosophy** – How would you approach the work for CESSE?
- **Portfolio** – Please provide writing and/or design samples which showcase the type of work you have done for clients.
- **Rates** – Please include information on your rates (by project, monthly retainer or by the hour) and payment terms.
- **References** – Please provide three (3) references including the type of work performed and contact information.

Response Deadline

Response deadline: December 8, 2017, 5:00 pm est
E-mail proposals to renee@cesse.org.

Notification Date

Phone interviews will be conducted December 11-13, 2017.

References will be contacted December 11-15, 2017.

We anticipate selecting a marketing partner by December 15, 2017, or earlier, if possible, with start of work projected for December 18, 2017.

Selection Criteria

1. Expertise in integrated marketing
2. Resources/capacity to perform the required work
3. Excellent project management skills and commitment to meeting deadlines
4. Ability to write and use images creatively to engage CESSE's membership and increase participation
5. Approach that makes efficient use of interaction needed from CESSE staff
6. Quality of the proposal
7. Price
8. References

Contract Term

Beginning December 18, 2017 through December 31, 2018.

Scope of Work

There are five areas of focus included in the Scope of Work. In some cases, there are multiple projects within the focus area. Focus areas are 1) ACCESSE18 conference, 2) Membership, 3) Partners, 4) blog and 5) monthly e-newsletter.

1. ACCESSE – the CESSE Leadership Conference

ACCESSE is the CESSE leadership conference. ACCESSE is the forum which allows for the exchange of information and where attendees share their experiences to address the problems, challenges, and opportunities they face in operating their societies. Combined with thought leadership, immersive experiential learning and expertise in managing engineering and scientific associations, ACCESSE is the only conference where staff leaders of scientific and engineering societies gain outside perspectives, develop new ideas and engage with CESSE's greatest resource - the CESSE members and partners.

Target audiences for ACCESSE include CEO's, aspiring CEO's, senior staff who are interested in growing their leadership skills and knowledge and leadership teams. There are additional sub-target audiences which may/may not be included in the campaign.

The theme for the ACCESSE18 conference is *"Adaptive Leadership in a Changing World."* See attached DRAFT conference framework for additional details. The goal for ACCESSE18 is to increase member registration/attendance by 15%. Strategies for achieving that goal include outreach through CESSE CEO's, peer-to-peer marketing, road shows and targeted messages to specific user groups (e.g. finance & hr). Please note: the content for this conference is typically still being developed in parallel to activation of the marketing campaign for the conference.

The CESSE staff (Program Manager and Executive Director) will create the strategy and key messages for ACCESSE18. CESSE uses multiple channels to make members, non-members and partners aware of conference offerings and convince them to register/attend. Outlined below are the projects for which CESSE is seeking assistance to market ACCESSE18 both in timely and effective manner.

Project	Details
Content calendar	Establish (with input from client) and update a content calendar showing all activities for ACCESSE
E-mail Blasts	Work with client to identify topics for 16-20 e-mail blasts that build upon each other Add topics to content calendar Write and edit e-mail blasts Design 3-4 different templates for e-mail blasts Compile graphics and copy Embed links Upload lists Test blast Publish e-mails weekly using Informz beginning in March Track stats
Community Messages	Work with client to identify topics for 6-8 posts/messages to be distributed in the CESSE Online Community Add topics to content calendar Write messages Edit messages
Website	Create 6-8 slider images for home page Develop headers for event pages using ACCESSE approved design

	Update content on home page and event landing page monthly beginning in January
	Work with client to identify appropriate content
	Add to content calendar
Direct Mail	Write, massage and edit content provided from client for 3 direct mail pieces (postcard, 4-page mailer and one last chance mailer size/length tbd)
	Layout and design of each piece
	Coordinate with client for 3 rounds of proofing per piece
	Make changes as required
	Coordinate production schedule with OmniPress (CESSE's printer/mail house)
Calling campaigns	Draft talking points for 2-3 peer-to-peer calling campaigns (Board to CEO's and Engagement TF to members)
Social graphics	Find/create 2-4 graphics or animated GIF's per month to be used with social media posts
Banner ads	Create 3 banner ads for CESSE Communities, CESSE 360 app and
Onsite program	Layout and design of printed onsite program
	Content provided by client
	Coordinate proofing with client
Signage	Layout and design of printed signage and banners
PowerPoint templates	Create 2-3 PowerPoint templates
Logo	Update/reformat current logo
	Update conference logo for following year (ACCESSE19)
List segmentation	Create segmented reports for e-mail campaigns, direct mail, calling campaigns etc.
Video	Capture testimonial footage
	Edit b-roll and testimonial footage

2. Membership

The key word that comes up again and again at CESSE is trust. CESSE members meet through our hallmark events, and continue the conversations well beyond. Whether you are looking for a sounding board to help you work through a challenge, tips and advice on industry practices, or referrals to other people who have a solution you can use, CESSE is here to be, or become, your professional network of choice.

CESSE would like to establish membership communication campaigns with the goals of welcoming and orienting new members, informing and engaging existing members and recruiting non-members to join CESSE. CESSE will work with marketing partner to develop strategies and key messages for new members, 2-3 key non-member segments. Outlined below are the tactics for which CESSE seeks assistance from a marketing partner or team of partners.

Project	Details
Segmentation	Review target audiences Work with client to create key messages for each target audience Explore individual messaging for 2-3 non-member segments to help identify which should be approached
E-mail blasts	Develop up to 4 e-mail blasts to be sent to non-members once per quarter Work with client to develop messaging for each e-mail blast Add topics to content calendar Write e-mail blasts Edit e-mail blasts Compile graphics and copy Embed links Upload lists Test blast Publish e-mail blast via Informz Track stats
CESSE Community Messages	Develop 8-10 messages that can be used in the CESSE Online Communities Work with client to identify topics for each message Add topics to content calendar Write messages Edit messages
Website	Identify membership content to be added or reworked Identify sources for content Add to content calendar Update membership web pages on quarterly basis Create 4 membership related slider images (1 image to be used on the homepage once a quarter)
Collateral	Write, edit, layout and design 1 membership recruitment piece Write, edit, layout and design 1 membership orientation packet Write, edit, layout and design 1 lapsed member campaign piece
Call campaign	Draft talking points for 1 peer-to-peer calling campaign to be used by the Engagement Task Force
Social graphics	Find/create 1 graphic or animated GIF per month (total of 12 for the year) to be used on social media
Banner ads	Create 1 banner ad to be used in CESSE Communities, CESSE 360 App and on the website
PowerPoint template	Create 2-3 PowerPoint templates for membership webinars/presentations

3. Partners

CESSE partners (aka sponsors) are corporations and consultants who work with associations to achieve their goals. There are three sectors of CESSE sponsors – technology, hospitality and consultants.

Technology includes software providers for databases, apps, learning management, content management, registration, project management, publishing platforms, online communities, marketing/communication, websites and anything else that provides efficiency and connectivity between staff and association members.

Hospitality providers include hotels, convention centers, convention and visitor bureaus, decorators, transportation, AV and production, speaker bureaus, meeting management companies, printers and various other meeting/conference related suppliers.

Consultants provide specific expertise that the association does not have on staff. The types of consultants are broad, but generally can be found in the areas of legal, finance, executive recruiting, strategic planning, facilitation, marketing, social media, international strategies, systems integration and business development.

Beginning in January 2019, CESSE will begin using a new partnership program which provides the partner with year-round benefits rather than just for a specific event. In preparation, for the new program CESSE would like assistance developing communications for existing partners with the goal of distributing these throughout 2018. In addition, CESSE would like to expand the number of partners in the technology and consultants/services sectors. Outlined below are the tactics for which CESSE seeks assistance from a marketing partner or team of partners.

Item	Details
Segmentation	Review target audiences Work with client to create key messages for each target audience Explore individual messaging for 2-3 partners segments to help identify which should be approached
E-mail blasts	Identify topics for each e-mail blast Add topics to content calendar Write bi-monthly e-mail blasts Edit e-mail blasts Create 2-3 e-mail blast templates Compile graphics and copy Embed links Upload lists Test blast Track stats
Website copy	Identify areas to be reworked and add new content Add to content calendar Update partner web pages
Collateral pieces	1 partnership opportunities prospectus Layout and design
PowerPoint template	Create 1 PowerPoint template for partner sales presentations
Promotional videos	Determine focus and length for one video Identify individuals to interview and coordinate Capture footage Edit videos

4. CESSE Blog
CESSE has developed blog posts a few times. CESSE would like to establish an organizational blog targeted toward CESSE members on a more frequent basis (at least monthly). Establishing and distributing blog articles would help showcase the work of CESSE members, provide recognition to CESSE leaders, volunteers and members, generate content which can be repurposed or expanded upon and ultimately engage members.

CESSE will need assistance with the following project details:
- Work with us to identify topics for a monthly blog
- Add topics to the CESSE content calendar
- Identify who can contribute to blog posts
- Interview contributors (if/when needed)
- Write monthly blog post
- Edit as needed
- Post to the CESSE website

5. Monthly E-Newsletter
CESSE currently uses Smart Brief to share industry news and a minimal amount of news from CESSE. The content about CESSE activities is at the bottom of the newsletter and there is limited flexibility in making this a CESSE branded piece. Therefore, CESSE would like to establish and distribute a monthly e-newsletter to CESSE members. The goal is to establish more routine communication with CESSE members and provide greater transparency on the activities of the organization.

Project details include:
- Working with client to identify goals for an e-newsletter
- Identify mechanisms to obtain/create content
- Develop e-newsletter format
- Create template for e-newsletter using Informz
- Work with client to select topics for the year
- Add topics to content calendar
- Coordinate interviews
- Interview sources
- Write and edit articles
- Compile graphics and copy
- Embed links
- Upload lists
- Test blast
- Publish e-newsletter
- Track stats