

Request for Proposal

The Research Collaborative

RFP: Digital Marketing & CRM Management

Proposal Due By: May 20, 2022

Project Overview

The Research Collaborative (RC) is a trusted go-to research, strategy, messaging, and collaborative convening hub for progressive national, state and local organizations working to realize the promise of a truly equitable, multi-racial democracy. RC generates and disseminates research, message guidance, and strategic approaches via its 10,000 email list and biweekly Movement Briefings. Our target audience is grasstop leaders of nonprofit organizations, research firms, and state and national partners.

The Research Collaborative is seeking a contract to maintain its current digital strategy, and RFP submissions for upcoming digital campaigns. While ideally a contract could cover the entirety of these projects, we understand that time commitment for all these responsibilities may not be possible for a single consultant or firm. To that end, please include which projects are within the scope of your current capacity and availability.

The two main areas of work are **Maintaining Current Digital Strategy** and overseeing three **Upcoming Digital Marketing Campaigns**. Maintaining current digital strategy is our priority contract we are looking to fill at this time. The Scope of Work below goes more into details of the expected weekly time commitment and the projects themselves.

Technical Qualifications

While you are not required to have professional experience in using these platforms and services, we do expect you to have some expertise in CRMs generally with a particular emphasis on setting up automation and external list communications. As a remote workplace, while most formal communications happen via email, coordination and daily conversations exist within the RC Slack workspace.

- **CRM:** HubSpot
- **Forms & Surveys:** Jotform
- **Webinars:** Zoom

Scope of Work

Maintain Current Digital Strategy

Consultants would be expected to run the digital side of our webinars occurring generally every two weeks, with approximately 500-700 attendees. This would entail email management (3 emails per webinar), attending briefings, managing technical aspects of automated systems through our CRM, and general webinar coordination.

Est. Time: 7 hrs/wk

Budget: \$6,000-\$12,000 per month

Expected Workload: 15 hrs/wk
Some months may include additional webinars, which would increase workload/budget.

Length of Contract: ongoing, renewed monthly, preferred commitment through 11/31/2022

In addition, general CRM management is necessary to maintain audience/partner relations, inbound emails, and overall list maintenance. Regular evaluation and reporting of the performance of our marketing and engagement activities is required. This also includes maintenance of other email subscriptions and sends related to other RC offerings such as “Open Mic.” Activities here include: reporting, inbox management, list clean-up, miscellaneous administrative CRM tasks.

Est. Time: 8 hrs/wk

Goals:

- Execute biweekly webinars
- Manage outgoing emails and replies inbox
- Maintain healthy & clean list
- Assist RC staff and board members with CRM needs
- Regular reports on list growth and activity

Upcoming Campaigns

The Research Collaborative has three main upcoming and ongoing digital campaigns that it seeks to have covered by a digital professional. Most campaigns are in the conception stage, with only the goals of the campaign outlined. If interested in one or more of these campaigns, **please submit a short overview of your approach to the project and any adjustments to the expected workload or timeline to complete.** See submission requirements for details.

Campaign I: Engagement Strategy

RC seeks a digital professional well-versed in list re-engagement strategies and list growth. RC’s current list is approximately 10,000. However engagement in RC’s primary offering, biweekly Movement Briefing webinars, has been declining. The target audience of grasstop leaders in the progressive movement has seen the most decline. At the same time, general public activists and volunteers are increasing in participation. RC would like to curb this increase to better the security of Movement Briefings and dial in on the target audience. Finally, there is a need to ensure that our current list is diverse and inclusive, and to that end, employ a strategy to ensure any expansion of the list prioritizes equity.

This project’s scope includes three phases: evaluating our current strategies and list, creating an action or intervention plan, and executing that plan.

Budget: \$4,000-\$9,000 total

Expected Workload: 40-60 hrs total

Projected Due Date: July 31, 2022

Goals:

- Increase engagement of target audience
- Decelerate expansion of non-target audience
- Grow list size to include unreached audiences with an emphasis on DEI principles

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| <p><i>Campaign II: Webinar Engagement Deep Analysis</i> RC has data for 21 past zoom webinars that need deep analysis, including pivot tables, of performance over time, measured by the organizations that attended.</p> <p>History: Early in 2022 RC staff completed analysis of past zoom performance measured by individual attendees and their various demographic information. RC staff spent considerable time then categorizing 2400 organizations in order to do a similar analysis.</p> <p>This project's scope:</p> <ul style="list-style-type: none"> • Review of the individual attendance analysis to understand scope of desired work product. • Use Excel Pivot Tables to analyze attendance at each webinar event. • Draft a report with trends, conclusions, and recommendations. • Create a slide deck and present findings to the RC Team and Board. | <p>Budget: \$3,000-\$6,000 total</p> <p>Expected Workload: 30-50 hrs total</p> <p>Projected Due Date: June 30, 2022</p> <p>Goal: Understand trends and performance of past webinars</p> <p><i>Required expertise in Pivot Tables</i></p> |
| <p><i>Campaign III: Subscription Website Launch</i> RC's offerings are soon to be expanded to include a subscription-based service for users to access exclusive research and messaging insights through a data portal. RC is looking for someone who understands how to launch websites or service offerings to target organizations. Organizational subscriptions are sponsored by RC's nonprofit c(3) arm, meaning users will not have to pay to use the data portal.</p> <p>This project's scope:</p> <ul style="list-style-type: none"> • Advise on current marketing launch plan, portal branding, and organizational branding. • Execute current marketing plan. • Draft marketing materials for launch. • Manage content calendar. • Outreach to key accounts and partners. | <p>Budget: \$3,000-\$6,000 total</p> <p>Expected Workload: 30-50 hrs total</p> <p>Projected Due Dates: Launch: July 15, 2022 End of Campaign: August 31, 2022</p> <p>Goals:</p> <ul style="list-style-type: none"> • Onboard 100 subscriptions • Foster trust and buy-in with key partners • Effectively communicate purpose and process of portal access |
| Additional Information | |
| <p>Considerations and Challenges</p> <ul style="list-style-type: none"> • The incoming RC team is small and new to digital best practices and the time needed to create digital processes. • Short turn-around time for certain digital needs and requests from the team. • Start-up organization with a new CRM and few processes in place. | |

- Recent departure of four staff members, including the Executive Director and the de facto Digital Director.
- Outside high-level leadership, RC has little recognizability in its purpose, mission, and brand; most people do not know exactly what RC is and what RC does.

RFP Application & Logistics

Evaluation Metrics

RC will evaluate bidders and proposals based on the following criteria:

- Commitment to mission and DEIJ principles
- Previous experience and past performance history
- Samples, portfolios, and case studies from previous projects
- Projected costs
- Years of experience and technical expertise

Selection Process

After submissions are received, the RC team will review your materials and reach out to consultants or firms that fit our needs. We will then schedule a 30-45 minute zoom call to answer any of your questions and to evaluate the best fit candidates. Finally, we will reach back out to selected consultants or firms for each project.

Submission Requirements

Submit your interest for these projects to Amanda Gnaedinger by **May 20**. Amanda is the main point of contact until May 25. At that point, contracts will be handled by incoming Executive Director, McKenzie Young.

- Resume
- Indicate for which project(s) you're submitting a bid
- **For any or all of the three Campaign bids**, please *briefly* tell us the following:
 - An overview of your approach to the campaign
 - How the timeline and workload fit within your capacity
 - *If needed*, recommended adjustments to timeline and workload based on your experience executing similar projects
- Your website (*optional*)
- Portfolio or Work Product Samples (*optional, no page minimums or maximums*)

Contact:

Amanda Gnaedinger (until 5/25)
McKenzie Young (after 5/25)

Email:

amanda@researchcollaborative.org
mckenzie@researchcollaborative.org