



North Carolina Humanities Council

Request for Proposal (RFP)

Phase 1: Comprehensive Brand Identity and Positioning

&

Phase 2: Website Design

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Phase 2: Website Design

A note regarding this project and timeline: Phase 1: Comprehensive Brand Identity and Positioning and Phase 2: Website Design need not be handled by the same company. Submitting a proposal for one or both elements of this project is acceptable. Phase 1 work will be completed first in 2018-2019, as it informs the website design process. Phase 2 will begin in mid-2019 after Phase 1 is complete. Full project shall be completed no later than November, 2019.

If submitting a proposal for either Phase 1 or Phase 2 only, the North Carolina Humanities Council requests a referral or suggestion of a company your company would prefer to work in tandem with on the other Phase of this project.

RFP Schedule and Deadlines:

RFP Release Date:	July 31, 2018
Question and Answer End Date:	September 14, 2018
RFP Submission Deadline:	September 21, 2018
Presentations (Invitation Only):	October- November, 2018

Send RFP Submissions to:

By Mail: North Carolina Humanities Council, UNC City Center Building, 320 E. 9th Street, Suite 414, Charlotte, NC 28202

Attention: Melanie Moore

By Email: mmoore@nchumanities.org

Subject Line: RFP from [company name]

Questions Regarding the RFP:

Direct all questions to: Melanie Moore; (704) 687-1524; mmoore@nchumanities.org

RFP ABSTRACT:

The North Carolina Humanities Council (NCHC/ the Council) is seeking a creative partner in its efforts to rebrand the Council into a relevant organization that fosters connections between communities through the humanities. Expected results of rebranding are to create new public awareness, attract philanthropic support, and enhance the public perception of NCHC. NCHC's last rebrand and website design occurred in 2007. It is anticipated that this project will be completed in two phases – Phase 1: Comprehensive Brand Identity and Positioning and Phase 2: Website Design. NCHC has allocated up to \$40,000 in resources toward this project to include Phase 1 and Phase 2; NCHC anticipates that some portion of the work will be performed on a *pro-bono* basis leveraging resources at submitting company.

PROJECT OVERVIEW:

NCHC has established itself as a leader in public humanities programming among select audiences but has not received broad recognition for its work among the general population. To further enhance the reputation of the organization and to fully reach its potential for attracting new and broader audiences, programmatic partners, private contributors, and corporate and foundational philanthropic funding, NCHC must articulate its unique position and leverage its strength into an effective, clear and distinct brand.

With our Board of Trustees' recent approval of our organizational Strategic Plan and Development Plan, our recent acquisition of an additional federal program (the North Carolina Center for the Book), and our 50th anniversary set to occur in 2022, now is an ideal moment to rebrand.

It is anticipated that this project will be completed in two phases – Phase 1: Comprehensive Brand Identity and Positioning and Phase 2: Website Design.

ORGANIZATIONAL OVERVIEW:

At the direction of Congress, the National Endowment for the Humanities (NEH) began to create state-based affiliates in the early 1970's. The North Carolina Humanities Council was established as a one of the NEH's affiliates in 1972. Today, there are 56 state and jurisdictional humanities councils that have a similar mission to NCHC and also receive operating support from NEH.

NCHC originally focused solely on awarding NEH grant funds to community projects in North Carolina, but by the early 1980's realized that in a state with North Carolina's demographic profile, it could not fulfill its education-based mission through administering NEH grants alone. Since then, NCHC continues to offer NEH grant funding for applicable community projects but also now gives cultural organizations across the state the opportunity to manage and participate in Council-operated public humanities programs. NCHC currently provides five Council-operated programs, offers three types of grant funding, and manages two Council awards and one literary writing contest. In June 2018, NCHC began operating the North Carolina Center for the Book. NCHC is currently working on incorporating its literary programming into the Council's existing program structure.

NCHC is a private 501(c)(3) nonprofit organization governed by an 20-24 member, volunteer Board of Trustees. The Board is comprised of public leaders, business leaders, scholars, and humanities professionals from communities throughout North Carolina. NCHC has a professional staff of 5 and in fiscal year (FY) 2018, operates with an annual budget of \$985,000. NCHC receives its core funding from an NEH general operating support grant and raises additional funds from private foundations, corporations and individuals. In 2016, 85% of the Council's budget came from the NEH; 15% from private donations and investments. The Council has recently adopted an organizational Strategic Plan and Development Plan, both focused on achieving a 'culture of philanthropy' in order to secure more private funding vs. federal NEH support. NCHC's FYs run from November 1- October 31. NCHC was headquartered in Greensboro, NC for 43 years and moved to its new Charlotte, NC location in 2015.

A. About NCHC:

Mission:

The North Carolina Humanities Council serves as an advocate for lifelong learning and thoughtful dialogue about all facets of human life. We facilitate the exploration and celebration of the many voices

and stories of North Carolina's cultures and heritage. Through our programs we seek to cultivate informed and active citizenship as an outgrowth of new awareness of self and community.

Tagline:

Many Stories, One People

Vision Statement:

The North Carolina Humanities Council envisions people who explore their personal and collective stories asking fundamental questions about identity, work, and culture; learning to value others' stories and perspectives; and transforming their lives and communities through new reflections and new visions.

Background:

The North Carolina Humanities Council develops among North Carolinians an understanding of and appreciation for the humanities that can transform the way they see themselves and their communities. In support of these goals, the North Carolina Humanities Council is committed to the following:

- An interdisciplinary approach to the humanities
- Dialogue
- Discovery and understanding of the humanities--culture, identity, and history
- Respect for individual community members and community values
- Humanities scholarship and scholars to develop humanities perspectives
- Cultural diversity and inclusiveness
- Informed and active citizenship as an outgrowth of new awareness of self and community

About NCHC's work:

As seen in the 2013 *The Heart of the Matter Report* "The humanities—including the study of languages, literature, history, jurisprudence, philosophy, comparative religion, ethics, and the arts—are disciplines of memory and imagination, telling us where we have been and helping us envision where we are going." Humanities scholarship, community partnerships, and citizen engagement are the cornerstones of our work. Healthy communities depend on the humanities to provide a forum for the exchange of ideas and viewpoints, opportunities to deepen their understanding of one another, and encouragement for innovation in civic life. Because of the geographic size and demographics of our state, NCHC primarily partners with other beneficial North Carolina historical and cultural institutions to create opportunities that maximize the impact of our programs, grants, celebratory awards and initiatives.

B. Websites, Publications and Social Media:

NCHC maintains a comprehensive website at www.nchumanities.org. NCHC also publishes e-newsletters six times per year through Mailchimp, an Annual Report, and other brochures, appeal letters and promotional materials as needed. Program and grant applicants use our external, online grant management software, Foundant; links are currently featured on our website for access. Trustees have access to our external Intranet site; links are currently featured on our website for access. NCHC is on Facebook and twitter at @NCHumanities.

C. Organizational Strategic and Development Plans:

NCHC Strategic Plan for FY 2018 – FY 2020:

Focus: Become a recognized leader in North Carolina and build organizational visibility

- Organizational model goal: Build best practices in order to achieve high performance goals and sustainability

- Engagement goal: Proactively engage potential collaborators, donors, volunteers and leaders
- Development goal: Build a broad, sustainable base of financial support for NCHC
- Program goal: Make high quality, relevant, and affordable humanities programming available to all North Carolinians

NCHC Development Plan for FY 2018:

Focus: Build a broad, sustainable base of financial support for NCHC

- Goal A: Transition the Council toward a culture of self-support and philanthropy in order to prepare for the possible reduction or termination of federal funding from NEH
- Goal B: Address the financial goals necessary to support the Council's annual operating budget and incorporate strategies for funding programs and events

PROJECT OUTLINE:

A. Project Timeline:

Ideally, Phase I will be completed within five months of contract date with Phase II to occur immediately thereafter, lasting no more than five months. Full project shall be completed by November, 2019.

B. Project Budget:

NCHC has allocated \$40,000 in resources toward this project. Due to NCHC's non-profit status, it is anticipated that a portion of the work provided to NCHC under the RFP will be performed on a *pro-bono* basis.

C. Phase I: Comprehensive Brand Identity and Positioning:

Overview: Proposals should address the current challenges of NCHC's brand recognition. Beyond NCHC's core constituency, NCHC is not widely known and some brand confusion does exist. For example, there is some confusion surrounding the name – North Carolina Humanities Council – as it evokes an assumption that NCHC is a governmental agency or is a nonworking committee. Yet, NCHC has built considerable equity in its name and this should be weighed as a determining factor throughout the rebranding process. 'The humanities' is also a term that is sometimes hard for those even working in the field to explain in layman terms. Thus, messaging and brand materials should be succinct and story driven.

The selected company will be expected to accomplish the following objectives. The selected company will work closely with NCHC's staff and Board, as appropriate, to produce a plan and timeline that addresses these objectives and NCHC's expectations as detailed.

- Research and Communication:
 - Work with staff and Board as needed
 - Meetings with key, internal constituents
 - Review of existing research and materials
 - Conduct on site presentation(s) to staff and Board
- Establish a clear brand message and identity that elicits excitement and provides understanding for the work and mission of NCHC
- Unite the various programs and elements of NCHC into one strong and effective brand

- Create a platform of key messages identifying the benefits for each key audience:
 - General Messaging
 - Program Messaging
 - Philanthropic Messaging

- Deliverables may include, but are not limited to the following. A re-envisioning of
 - Organizational Name
 - Organizational Theme
 - Logo
 - Mission Statement
 - Vision Statement
 - Tag Line
 - Brand collateral (e.g: letterhead, business cards, email templates, etc.)
 - Style Guide

- Create a marketing and advertising campaign to introduce rebrand and produce related collateral. Campaigns should reach constituents through advertising, public relations, social media and other means. Metrics for measuring outcomes should be included.

D. In Phase II: Website Design

Overview: Phase II will focus on the creation and implementation of an integrated web-based presence through a website that is desktop and mobile compatible. New hosting for the website and related Trustee Intranet is necessary. The Council's website is currently operating via Drupal 6. Once built, NCHC staff will manage daily, basic content updates, but the chosen firm will provide an ongoing maintenance support package. Proposals should clearly indicate if the company has the capacity to perform these duties, or will subcontract any portion thereof. If the firm has existing relationships with subcontractors to perform these services, then the RFP should indicate who they are and under what circumstances they would be engaged to perform work.

The selected company will be expected to accomplish the following objectives. The selected company will work closely with NCHC's staff and Board, as appropriate, to produce a plan and timeline that addresses these objectives and NCHC's expectations as detailed.

- Research and Communication:
 - Work with staff and Board as needed
 - Meetings with key, internal constituents
 - Review of existing research and materials
 - Conduct on site presentation(s) to staff and Board

- Produce cost estimates for a multi-functional website and its development, inclusive of timeline for completion and any additional associated costs

- Website Design needs include, but are not limited to the following.
 - New hosting

- Promote NCHC opportunities in an engaging format that is user-friendly, dynamic, and incorporates many visual elements
 - Editing capabilities for NCHC staff
 - Web calendar or similar functioning mechanism
 - Potential to incorporate numerous online forms
 - Feature prominent placement of donation opportunities and e-newsletter signup
 - Include password protected sections for board members (to replace Trustee Intranet)
 - Search box and site map
 - Be desktop and mobile friendly
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INSTRUCTIONS AND FORMAT REQUIREMENTS FOR SUBMISSIONS:

All RFP submissions should be in the following format, and should fully respond to each item listed below in the order presented. NCHC recommends inclusion of the text header and section instructions in the RFP and incorporating answers below the identifying header and instructions. Answers are not restricted in terms of length and respondents may incorporate data, charts, graphs, images, graphical elements or any other information that they feel is necessary to support an answer.

Any and all costs incurred and expended by participants in the RFP process in order to respond to this RFP and produce and perform all submittal requirements shall be the responsibility of proposer.

A. Executive Summary:

State which Phase of the project you are submitting for. Briefly summarize relevant experience, expertise and desire to undertake the project.

B. Company Profile:

Provide all relevant information about your company, inclusive of its mission and vision/values statement, business model (including the breadth and depth of all services offered, even if outside the scope of this RFP), number of staff, office location (if multiple locations, indicate which office will handle day-to-day responsibilities for the project), and an overview of experience in developing brand identity for similar organizations and/or nonprofit entities.

C. Critical Assumptions

Articulate any critical assumptions your company has made regarding the development of your RFP, particularly as it relates to timing, implementation, resources and/or staff involvement by NCHC.

D. Project Approach and Work Plan Timeline

Provide a detailed project plan and timeline that includes tasks, milestones, involvement of NCHC staff and the responsible person for completion of items.

E. Proposed Project Team

Provide a summary of all key personnel necessary to accomplish the scope of services, with their respective resume and experience with similar projects. Personnel must be available for the full duration of project.

F. Professional Fees

Provide a detailed budget and overall cost for the project, along with requested payment terms. Clearly indicate any additional costs that might be incurred that are not included within the budget and the fee schedule/rate at which these charges will be billed.

G. References

Provide the names and contact information of at least three references whom you have recently worked

with. References from nonprofits or cultural organizations are preferred.

H. Additional Information

Please provide any additional information or materials considered essential to the proposal and not requested in any of the previous sections.

EVALUATION AND CONTRACT AWARD:

- A. This solicitation for proposals, the evaluation of submissions and the award of a contract shall be made in accordance with the policies and procedures of NCHC, as applicable. NCHC reserves the right to amend or withdraw this RFP at any time. All RFP documents submitted to NCHC will become the property of NCHC and will not be returned.
- B. NCHC staff will evaluate the proposals to determine whether the submission fulfills the needs and requirements of NCHC. NCHC may request additional information in order to clarify the proposal or its individual elements.
- C. The criteria used to evaluate the RFP will include, but is not be limited to:
 - The completeness of the proposal in addressing the project needs and the inclusion of all requested information;
 - The company’s ability to demonstrate the necessary capacity to fulfill the proposed scope of work;
 - The company’s approach to the issues of branding and positioning articulated in this RFP;
 - The experience of key personnel in providing counsel and advice to mission-driven organizations with respect to issues of branding and positioning;
 - The quality and experience of the proposed team and their ability to meet the requirements and expectations of the RFP based upon previous work with similar organizations and projects; and
 - The cost of the services to be provided and the timeline for completion of these services
- D. Upon review of the proposals, NCHC may request an oral presentation to accompany the submission and will notify those selected of the timing and schedule.
- E. NCHC reserves the right to accept or reject any and/or all submissions, make one award or to make no award, and/or waive any immaterial deviation in an RFP at NCHC’s sole discretion. The waiver of any immaterial deviation shall not modify the RFP document nor shall it excuse the proposer from full compliance with all requirements of this RFP and the contents of proposer’s submission as accepted by NCHC.
- F. Once a final selection is made, NCHC will negotiate an agreement with the finalist regarding specific tasks, deliverables, costs, terms and conditions. If during the negotiations NCHC, in its sole discretion, determines that an agreement is unlikely to be reached, NCHC may act in its own best interests to end negotiations and pursue another alternative.
- G. Any final contract resulting from this RFP will be awarded to the organizations whose proposal offers the greatest overall benefit to NCHC based upon consideration of total value to be delivered, timeframe, and quality of professional services offered.

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