

Request for Proposals for NABE Consultants

The National Association of Bar Executives (“NABE”) is an association of approximately 600 bar professionals who are employed at state, local, specialty and other bar associations principally located in the United States. NABE is seeking proposals from seasoned association professionals, consultants or bar associations to provide either overall or limited project management services to assist with significant organizational changes and certain communication needs.

Respondent Qualifications/Needs

Any RFP respondent must be a bar association, an association or communications professional who has served in the capacity of a senior level director, associate or deputy executive director or executive director in a bar association or other association environment. In addition, the respondent must:

- have significant experience managing volunteer members;
- understand the dynamics of organizational change and be comfortable in a changing environment;
- understand the importance of buy-in at all levels of the organization (members, section and committee chairs, current staff and Board);
- understand how to manage complex projects that involve board approval;
- be approachable;
- be well organized;
- be an excellent communicator;
- be a “go getter” and comfortable working independently;
- be able to manage priorities and execute in a timely fashion regardless of other client priorities;
- be cognizant of other NABE priorities that will take place concurrently during the scope of this project¹

Listed below are the NABE Board’s priorities over the next 3 years with the target timeline for completion.

The Board invites responses that offer services that will support all of the priorities listed as well as responses that are limited to the support of specific needs listed.

¹ Currently, the ABA Division for Bar Services provides staff support to NABE. Given the scope of these projects out for RFP, the Board has decided to retain project manager(s) specifically for these efforts. This position, while not reporting to ABA-DBS, must be able to coordinate as needed with DBS and have a working understanding of its role supporting NABE.

Strategic Priorities Phase 1 (completed by end of 2018 or at a date determined by the Board):

1. Sunset the current “midyear” meeting that takes place before NCBP at ABA Midyear Meeting beginning with the by 2022 meeting.
2. Broaden NABE offerings concurrent with the NABE CSE Retreat to provide for targeted programming for a range of NABE members
3. Enhance the Annual Meeting
4. Reconstitute the “Program Committee” and give it a broader charge to ensure that more NABE members have access to educational content and mediums that work for them
5. Change Name of the Program Committee to the Professional Development Committee
6. Adopt the New Formal Charge for the Professional Development Committee
7. Adopt new Committee Composition for the Professional Development Committee
8. Open up pathways to the Professional Development Committee
9. Create “Community” for bar professionals we aren’t currently serving:
 - a. Create groups or listserves for all members, regardless if there is an external group
 - b. Make members aware of any external groups that could help in their success
 - c. Maintain the well liked listserves but also explore Facebook groups and other forms of e-communities and be willing to adapt.
 - d. Continue to develop leading-edge communications tools
10. Better Onboard New Members into NABE:
 - a. Examine Welcome Messages:
 - b. NABE Newsletter Letter^{2*}:
 - c. Welcome New Members on NABE Social Media:
 - d. Buddy/Mentor Program*:
 - e. New Member Welcome at Midyear/Annual Meetings*:
 - f. Sections Should Welcome New Members
11. Better Engage New and Newer Members to NABE:

^{2*} denotes ideas we understand the Membership Committee is working on. Some of these recommendations could easily be deployed to other entities if added to their charge.

- a. Expand the concept of the buddy system to creating classes or cohorts:
- b. Invite newer people to speak at programs and write articles to increase their buy into the organization
- c. Modify Attendance Rosters to include headshots

12. Develop the following Tools and Resources to Help Onboard and Assist New Bar Professionals:

- a. Continue to offer new ED Boot Camp
- b. Develop a Series of “The Bar as a Business” webinars/online chat groups
- c. Develop Tools and Resources for small bars
- d. Develop Training on the Unique Qualifications to succeed as a Bar Professional

Strategic Priorities Phase 2 (completed by end of 2019):

- 13. Clarify NABE’s value proposition. Be clear about what NABE addresses (or doesn’t need to address).
- 14. Look for collaborations in content and programming with NCBP and ABA DBS to avoid duplication:
 - a. Review and address what content needs to go where
 - b. Add content that is currently missing
 - c. Remove NABE content that is not needed or contributes to confusion or that is covered by another organization
- 15. Simplify NABE Content offerings to avoid “organizational bleed” or confusion about what NABE is about
- 16. Beyond Content, look at how and when NABE information is sent to members, how that impacts confusion about the NABE Value Proposition and make changes as needed.
- 17. Survey Small Bar Members about interests and needs re: events and resources.
- 18. Better advocate for Bar Professionals and Professionalism by communicating specific messaging to and through external stakeholders (namely the ABA, NCBP and NCBF).

Strategic Priorities Phase 3 (completed by end of 2020):

- 19. Change the name of the organization to the National Association of Bar Professionals
- 20. Adopt the list of unique aspects of a bar association (as compared to other work in the legal profession):

- i. As a service organization a bar association is population-based rather than client based and hence requires at times, and at various levels, that competing needs/desires/aims be balanced for the good of the organization and membership.
- ii. Bar association work is entrepreneurial and requires some measure of risk-taking, even within those bars with regulatory functions.
- iii. Bar associations must respond to regular changes in leadership with constancy and respect for leaders, those led, and the mission/charge.
- iv. Bar associations (even voluntary) are in some measure public entities and as such have an ethical responsibility to the population within the profession represented by the bar (even those who are not members of the bar association), and to the public.
- v. Bar associations represent – whether actively or passively – the legal profession and as such their communications or silence about a matter pertaining to the profession (vs. a matter pertaining to a particular case or political issue) has standing with other social entities and with the public.
- vi. Bar association staff members work to advance the interests of the legal profession; unlike attorneys, however, they are not self-employed, firm associates or partners, or specialized employees working in support of an organization with a mission unrelated to the legal profession. This unique relationship to the profession, this unique characteristic of a bar association, calls for unique approaches to the professional development of such employees.

21. Consider Developing Base Level Position Descriptions for Bar Professionals

22. Referred to Committee: Address what NABE does that contributes to a “cliquish” feeling in the organization and make systematic changes:

- Maintain and enhance buddy system
- Ensure committee assignments are diverse members and transparent
- All committee members should be contacted to feel engaged
- Have all leaders message members using newer tools (like videos and podcast) to better personalize the association.

23. Referred to Committee: Address and reiterate the importance of diversity at all levels

- In event development
- Committee appointments

24. Look for other synergistic opportunities in live programming to leverage resources and attract a broader spectrum of members.

Communication Priorities (2018 - 2020)

In addition, NABE is also looking for a bar association or other consultant who can support NABE's communications needs. Specifically, this includes monitoring and curating bar and other association best practices via social media and in NABE publications; creating robust content and presence on NABE social media platforms in areas such as best practices, model programs and other content that help bar professionals succeed in their day to day positions; and updating content on the NABE website in accordance with Board priorities.

Please note that some of the priorities detailed above will involve coordination with ABA-DBS and some of the priorities will require the consultant(s) to lead the effort transitioning to the new structure or ensure the new scope/charges are clear. Based on the responses received and the experience of the final candidates, the Board will narrow and define specifically the scope of what the consultant will be charged to develop and/or oversee.

Expectations:

Any successful consultant or association will be expected to (1) devise a communications system to apprise the full membership about ideas under consideration and obtain needed input from the membership to establish final priorities; (2) create formal implementation strategies for the final priorities and/or 3) coordinate and curate communications.

Response to the RFP

In your response, please describe your background, how you possess the above qualifications and can address NABE needs, and how you individually or through your association propose to manage these priorities and your hourly rate for services.

Any questions should be directed to the NABE RFP Task Force c/o Julie Armstrong (jarmstrong@indybar.org) and Ellen Miller- Sharp (emiller@sdcbba.org) via email no later than August 15, 2018. All responses should be sent to Julie Armstrong (jarmstrong@indybar.org) and Ellen Miller-Sharp (emiller@sdcbba.org) via email by September 1, 2018.

Thank you for your participation in this RFP process.