



**Pacific Northwest Tribal Lending,**  
**a Community Development Financial Institution**  
Previously, Lummi Community Development Financial Institution, 501 (c) (3)  
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January 13, 2025

## Request for Proposal (RFP)

To: Request For Proposals: Strategic Planning

From: Board of Directors Chairman, Rex Rhoades, Pacific Northwest Tribal Lending, a Community Development Financial Institution

Dear Sir or Madam:

Pacific Northwest Tribal Lending (PNTL), previously Lummi CDFI, is requesting proposals from professional firms to conduct and compile a 3-year Strategic Plan for the organization. We are seeking responses from companies that have experience working with non-profit organizations, especially Native CDFIs (<https://www.cdfifund.gov/programs-training/programs/native-initiatives>). We invite you and/or your firm to submit a proposal to us by **Monday, February 3, 2025**, for consideration.

### Profile / Background of PNTL

PNTL is a Washington State nonprofit public benefit corporation recognized by the Internal Revenue Service as a charitable, tax-exempt organization pursuant to section 501(c)(3) of the Internal Revenue Code. PNTL was founded in 2006 with a defined mission "to provide access to education, financing, and asset growth, in order to improve the prosperity and well-being of Native American families." We do this by providing small business, consumer (credit builder) loan products and financial tools, one-on-one technical assistance, business resources and hands-on guidance to new or existing Native businesses and families. We also provide financial resources for community-based projects that create and/or support economic opportunities.

We obtained Certification as a Native CDFI in 2008, IRS 501c3 designation in 2012, and Certification as a Community Development Entity (CDE) in 2017. Annual operating budget is approximately \$750,000 per year with a staff of 4.5 FTEs. Target market is Native entrepreneurs, individuals and families within Northwest Washington State and beyond.

### Project Purpose and Description

PNTL is experiencing a steady increase in interest and demand for our products and services. At the same time, CDFIs, especially Native CDFIs, are getting recognized nationally for a track record of success in reaching and providing relevant resources for and in the most underserved communities, also increasing awareness of access to capital available from CDFIs.

### Mission Statement

To provide access to education, financing, and asset growth,  
in order to improve the prosperity and well-being of Native American families.

Therefore, the Board of Directors recently adopted a new name, Pacific Northwest Tribal Lending (PNTL), that represents the expanding products and services we offer. This RFP is to develop a 3-year Strategic Plan to clarify and guide the organization with clear high-level objectives, action steps in order to reach identified goals.

### **Services to Be Performed**

Your proposal is expected to cover the following components:

- 1) Propose a facilitated process that interacts with PNTL Board of Directors, staff, communities served and strategic partners that will provide actionable guidance PNTL's future goals / direction.
- 2) Upon approval from PNTL, implement the agreed facilitated process.
- 3) Provide a 4–7-page final compilation / report of the results of the above facilitated process that includes a well-articulated, relevant, and implementable action strategy that identifies priority goals / objectives with presentation to PNTL Board of Directors for approval.
- 4) Conduct an implementation session with staff to outline specifics on the inputs (resources), activities, outputs (direct results of activities) needed and/or anticipated in carrying out the Board adopted Strategic Plan. Identify desired outcomes (changes in knowledge, behavior, or conditions), and an overarching "impact."

### **Timeframe**

Proposals are due from Brand Strategy firms by end of day, **Monday, February 3, 2025**. Anticipated completion of PNTL Strategic Planning process is June 2025.

### **Proposal Content**

Please provide a 3–5-page proposal that includes:

- A. Executive Summary: A one-page summary (bullet points acceptable) of the work to be performed and your firm's ability to perform the work within the time frame provided.
- B. Supplemental Information: Three to four page supporting documentation that describes your firm's:
  - a. Professional Experience and Team Qualifications
  - b. Approach and Suggested Steps, Meetings (virtual and/or in-person) and Timeline
  - c. Fees
  - d. Client References.

### **Evaluation of Proposals**

While price is an important factor, PNTL will evaluate proposals on price and the following criteria:

- Preference is given to Native and Native-led organizations.

- Prior experience developing relevant and implementable Strategic Plans with similar organizations that has resulted in a well-developed organizational presence.
- Qualifications of staff to be assigned to the Scope of Work.
- Technical Skills:
  - Excellent ability to develop relevant content that aligns with mission and values.
  - Clear communication, listening and problem-solving skills.
- References
- Completeness and timeliness of the proposal

### **Key Contacts**

Following are key contacts for information you may seek in preparing your proposal:

Nancy Jordan, Executive Director

Office Phone: (360) 594-6004

Email: [NancyJ@LummiCDFI.org](mailto:NancyJ@LummiCDFI.org)

Let us know if you have any questions or would like additional information. Please return the completed proposal to my attention at the email address provided. We would also appreciate a response if you declined to submit a proposal.

For more information, please visit our website at [www.LummiCDFI.org](http://www.LummiCDFI.org).