

Lummi Community Development Financial Institution, 501 (c) (3)

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July 31, 2023



Request for Proposal (RFP) – **Deadline Extended**

TO: Requests for Proposals: Update Current Media Presence

From: Rex Rhoades, Lummi CDFI Board Chairman

Dear Sir or Madam:

Update: In respect of Paddle to Muckleshoot and other Native events happening during August, the deadline for our RFP is extended to Tuesday, August 29, 2023.

Lummi Community Development Financial Institution (CDFI) is requesting proposals from professional media and social media firms to **update our current media presence and assist our short-term social media/marketing needs.** We are seeking responses from companies that have experience working with non-profit financial organizations such as Native CDFIs.¹

We invite you and/or your firm to submit a proposal to us by the **EXTENDED DEADLINE of Tuesday, August 29, 2023,** for consideration. A description of this project, our organization, the services needed, and other pertinent information follows:

Profile / Background of Lummi CDFI

Lummi CDFI 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. Lummi CDFI 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," by providing small business and consumer (credit builder) loan products, one-on-one technical assistance, business resources and hands-on guidance to new or existing Native businesses and families. We obtained our IRS 501c3 designation in 2012, our Certification as a Native CDFI in 2013, and our Certification as a Community Development Entity (CDE) in 2017.

Our annual operating budget is approximately \$700,000 per year, and we currently employ 3.25 people and serve Native entrepreneurs, individuals and families within Lummi Nation, Whatcom County, and the Northwest Washington region. Our main sources of revenues are from grant funds, primarily from federal, state, and private sources, and earned revenue from loan interest repayments. Our primary program is to offer small business and consumer (credit builder) loans to Native entrepreneurs and/or individuals. In addition, we provide technical assistance in the form of one-on-one counseling and coaching, training on specific topics pertinent to the client and a healthy small business economy, and access to resources outside of

¹ Native CDFIs help Native Communities thrive and grow by increasing their access to credit, capital, and financial services. (<https://www.cdfifund.gov/programs-training/programs/native-initiatives>) The Mission of Lummi CDFI is to provide access to education, financing, and asset growth, in order to improve the prosperity and well-being of Native American families.

Lummi CDFI Mission

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

the local community for opportunities, access to other sources of capital and training. With this work, Lummi CDFI engages in education and advocacy on behalf of Native entrepreneurs and/or individuals where gaps or limitations hinder the establishment of a trusted, knowledgeable, and relevant financial institution.

Lummi CDFI's current target market is Lummi Nation and Whatcom County. However, in recent years, we have begun to serve an increasing number of clients outside of that area, including communities such as Tulalip Tribe and others in Northwest Washington State.

Project Purpose and Description

With the above-mentioned growing interest in both Lummi CDFI and demand for access to capital for Native entrepreneurs, the Board and staff wish to review and refresh our **current media presence and social media marketing**. While this RFP addresses our current needs, additional RFP processes are pending that will address our overall organization's Target Market and Brand Strategy which will result in an update of target market outreach and media and marketing presence.

This RFP is for the **current media presence and social media marketing outreach** of Lummi CDFI to our target market and beyond. Scope of Work is outlined below.

Existing Media and Social Media Ecosystem

Currently, we have the following avenues for media and social media:

- Website (using www.WIX.com platform): www.LummiCDFI.org
- Facebook:
 - Lummi CDFI: <https://www.facebook.com/LummiCommunityDevelopmentFinancialInstitution>
 - Lummi Cdfi: <https://www.facebook.com/LCDFI>
 - BOD of the Lummi CDFI.501 c3: <https://www.facebook.com/LCDFIBoardOfDirectors> (to be closed/deleted)
- Instagram: <https://www.instagram.com/lummicdfi/>
- Twitter: <https://twitter.com/lcdfi>
- To be developed: LinkedIn

Challenges

This project is being launched while at the same time we are undertaking a larger full organizational update to our brand strategy. We anticipate this will be approximately an 8- to 10-month process and result in a new direction for our messaging, logo, and prospectively, organizational name. For this reason, our current media needs will be limited to working within the framework and sites already in existence.

Services to Be Performed / Scope of Work

Your proposal is expected to cover the following services:

- 1) Review Lummi CDFI's existing media presence and provide professional services to update content and media presence, primarily the Lummi CDFI webpage and Facebook.

- 2) Work with staff and our Community Development & Messaging Committee to create and update our existing web and social media platforms and prepare a short-term media posting schedule utilizing existing Lummi CDFI marketing and media tools.
- 3) Provide regular media content (estimating 2-4 per month) that is relevant to the work of Lummi CDFI.
- 4) Upon staff approval, upload regular media posts and monitor responses, feedback and leads.

Timeframe

The following is the anticipated timeframe for the services to be provided. Dates are subject to change depending on final availabilities and agreements.

- Receipt of proposals from Media/Social Media Specialist firms – **EXTENDED to Tuesday, August 29**
- Selection of Media/Social Media Specialist firm – **EXTENDED to Tuesday, Sept 5**
- Finalize Contract and Scope of Work – **EXTENDED to Tuesday, Sept 12**

We anticipate this project to require 2-4 weeks of working with Lummi CDFI staff and Board to re-set current media and social media platforms. After which, monthly maintenance of content development, recommendation and posting for approximately 8 to 10 months while the organization's Brand Strategy is updated.

Proposal Guidelines / Content

To simplify the evaluation process and obtain maximum comparability, Lummi CDFI requests that responses to the RFP be organized in the manner and format described below:

- A. Executive Summary: Describe your understanding of the work to be performed and your firm's ability to perform the work within the time frame provided.
- B. Professional Experience: Describe how and why your firm is different from other firms being considered. This should include an explanation of the firm's philosophy, size, structure, and qualifications with serving not for profit organizations with a similar size and operations.
- C. Team Qualifications: Identify the specific partners, managers, and in-charge staff who will be assigned to this engagement if you are successful in your bid. Provide their bios specifying relevant experience to the type of services requested.
- D. Approach: Describe how your firm will approach the proposed services, including the use of affiliates or staff from other locations, areas that will receive primary emphasis, and the type of assistance that will be required from Lummi CDFI's staff. Also discuss the firm's use of technology.
- E. Fees: Please provide a firm estimate of fees for the services to be provided.
- F. Client References: Include a list of the relevant clients, from within the Native non-profit and community development financial institution sector, that the firm has served within the past three years and furnish the names and telephone numbers of any references whom we may contact.
- G. Additional Information: provide any additional information, not specifically requested, but which you believe would be useful in evaluating your proposal.

Evaluation of Proposals / Bidder Qualifications

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

- Preference is given to Native and Native-led organizations.
- Prior experience updating media and marketing tasks with similar organizations that has resulted in a well-developed media presence.
- Qualifications of staff to be assigned to the Scope of Work
- Media specialist's understanding of work to be performed.
- Technical Skills:
 - Bachelor's degree or equivalent experience in marketing, ideally in a non-profit, especially Native or minority focused, community development organization.
 - Knowledgeable about marketing trends and techniques.
 - Proficiency with WIX.com, Facebook, Instagram, Twitter, LinkedIn, and other social media applications.
 - Excellent content development and writing skills, especially in web and social media platforms.
 - Clear verbal and written communication skills.
 - Quick decision-making skills.
 - Flexible, accessible, and responsive working schedule.
 - Problem-solving.
- References
- Completeness and timeliness of the proposal

Key Contacts

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

Nancy Jordan, Interim Executive Director

Office Phone: (360) 594-6004

Email: 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.

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Nancy Jordan

Interim Executive Director