December 29, 2023

Request for Proposal (RFP)

To: Request For Proposals: Brand Strategy Process

From: Board Chairman, Rex Rhoades, Pacific Northwest Tribal Lending, a Community Development Financial Institution, previously Lummi CDFI

Dear Sir or Madam:

Pacific Northwest Tribal Lending (PNTL), previously Lummi CDFI, is requesting proposals from professional firms to develop and implement a Brand Strategy process. 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 Wednesday, January 24, 2024, for consideration.

Profile / Background of Lummi CDFI

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 4.25 FTEs. Target market is Native entrepreneurs, individuals and families within Lummi Nation, Whatcom County, and the Northwest Washington region.

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. Therefore, the Board recently adopted a new name, Pacific Northwest Tribal Lending (PNTL), that represents the expanding products and services we offer. A media specialist has been hired to increase awareness and begin creating content and impact stories being experienced by

Mission Statement

To provide access to education, financing, and asset growth, in order to improve the prosperity and well-being of Native American families.
clients. This RFP is to develop a full Brand Strategy to both refresh and clarify our marketing message and better equip us to reach our growing target audience.

**Services to Be Performed**

Your proposal is expected to cover the following components:

1) Develop a Brand Strategy process with identified participants, actions, timeline, milestones, deliverables, budget, and outcomes that is based on a clear understanding of PNTL and the community values that formed and shaped the organization. Board to approve the strategy process.

2) Once approved, implement a Brand Strategy process with identified participants, actions, timeline, milestones, deliverables, budget, and outcomes.

3) Compile and incorporate results from the Board Mission, Vision and Values, Target Market, Target Product Assessments, and any meetings, surveys, interviews, or other input deemed pertinent to this project.

4) Complete the following tasks:
   a. Develop new or refresh our existing logo, colors, font and other design features for organization’s image and presentation (graphics).
   b. Develop a new website, social media, collateral materials, and media kit based on new or refreshed logo, colors, font, graphics, etc.
   c. Develop a marketing strategy with action steps, assigned responsibilities, timeline with milestones, estimated budget, and expected outcomes, especially as we prepare for PNTL’s 20th anniversary in 2026.

5) Prepare final documentation that includes a well-articulated, relevant, and implementable brand strategy, with related graphics, media kit, collateral materials, timeline, and projected budget.

**Timeframe**

Proposals are due from Brand Strategy firms by end of day, **Wednesday, January 24, 2024**. Anticipated completion of PNTL brand process – Spring 2024.

**Proposal Content**

To simplify the evaluation process and obtain maximum comparability, PNTL 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 in serving non-profit organizations.

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 PNTL’s staff. Also discuss the firm’s use of technology.

E. Fees: Please provide a firm estimate of fees, including any partner entities such as photographers, videographers, graphic designers, etc., for the services to be provided.

F. Client References: Include a list of media clients, from within the non-profit and community development financial institution sector, the firm has served within the past three years and furnish contact information for 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
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 Brand Strategies with similar organizations that has resulted in a well-developed organizational presence.
- Qualifications of staff to be assigned to the Scope of Work.
- Brand Strategist’s understanding of PNTL and the work to be performed.
- Technical Skills:
  - Successful experience in developing and implementing brand/marketing strategies for entities, especially Native and/or minority focused non-profits.
  - Excellent ability to develop relevant content that aligns with mission and values.
  - Clear communication skills.
  - Strong 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, 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.