Delaware Bankers Association
Delaware Financial Education Alliance

8 W. LOOCKERMAN STREET ● SUITE 200 ● P.O. BOX 781 ● DOVER, DE 19903-0781
(302) 678-8600 ● www.debankers.com

MARGARET CREGAN
Chief Administrative Officer

RENEE L. DUNCAN
Member Support Manager & Accounting Assistant

GREGORY KOSELUK
SVP Marketing & Public Relations

DAVID MENCH
Director of Government Affairs

KARYN S. W. POLAK
President, CEO & Treasurer

CORINNE STAYTON
Director of Events/Event Technologist

REQUEST FOR PROPOSALS FOR BRAND AND COMMUNICATIONS

The Delaware Bankers Association (DBA) and the Delaware Financial Education Alliance (DFEA and, together with the DBA, the "Association") are nonprofit, member-driven organizations representing financial institutions operating in a highly regulated and rapidly evolving environment. The Association serves its members through advocacy, education, professional and pipeline development support, and industry engagement. Governed by a volunteer Board of Directors and supported by professional staff, the Association is undertaking an update of its brand and communications approach to ensure it remains relevant, responsive, and financially sustainable amid regulatory change, industry consolidation, and evolving member expectations.

PURPOSE

The Association seeks proposals from qualified consultants—preferably boutique firms or independent practitioners—to refresh the organization's visual identity, messaging, and collateral and craft metrics and processes that optimize its ability to engage its members, gain feedback, and maximize its reach with its target audience.

ABOUT US

The Delaware Bankers Association is a 501(c)(6) tax-exempt, not-for-profit private trade association with a diverse membership comprised of tax paying international, national and state-chartered banks, savings banks, non-deposit and limited purpose trust companies, and banks with operations in the State of Delaware.

- The DBA provides members with a forum to exchange valuable industry information to maintain a safe and sustainable financial services industry.
- The DBA serves as the voice of the banking and trust industry to state and federal legislators and regulatory agencies.
- The DBA actively participates in legislative and regulatory affairs at the state level including drafting, monitoring and supporting legislation beneficial to the banking and trust business in Delaware.
- The DBA communicates with and educates legislators, the media, regulatory agencies and the public on issues affecting the financial services industry.

- The DBA also works with other state bankers associations and trade groups like the American Bankers Association to monitor federal legislation and advocate on behalf of its members.

The Delaware Financial Education Alliance is a 501(c)(3) tax-exempt entity focused on improving financial well-being, access, and opportunity for all. Formed in 1983, the DFEA is committed to helping consumers become better educated about topics that impact their overall financial capability, of which financial literacy is a fundamental pillar.

- The DFEA provides financial literacy training designed for and targeted to persons of low and moderate income in the State of Delaware through a variety of educational programs. These programs are focused on specific knowledge and concepts that individuals need to know to manage their finances and increase economic security.
- The DFEA provides training programs to employees of member institutions. The DFEA offers numerous quality educational programs, including certified courses, seminars in a variety of banking skill areas, participation in a full range of degree programs, and a variety of bank-related schools.
- The DFEA also provides educational and information-sharing forums to meet the diverse needs of its members.

PROJECT OVERVIEW

As the Association embarks (separately) on the work to develop its next strategic plan, the organization seeks to refresh its brand and marketing approach, ensuring it resonates with and reaches its many constituents, including individuals who work in the banking and trust field, partners and vendors to banking and trust institutions, and those who craft policy, legislation, regulation, and other guiderails that impact or apply to the industry. This project includes refreshing the organization's visual identity, refining organizational messaging, and developing tactical guidance and standard operating procedures to strengthen how the Association uses marketing and communications to advance its mission and expand its impact.

This project will occur alongside the Association's strategic planning process, and the selected vendor will need to work closely with Association staff, its strategic planning consultant, and its project manager for the collective work to ensure alignment with both this initiative and the broader strategic planning effort. The Association is also working to identify an Association Management System that will tie together its updated strategic plan and refreshed brand and communications approach into a seamless foundation for operating through and beyond the end of the decade. The brand and communications consultant will need to work collaboratively and efficiently with other Association providers to achieve this aligned end result.

SCOPE OF WORK

1. Marketing and Communications Development: Analyze current brand positioning and marketing to further understand strengths and opportunities.
2. Visual Identity: Create a visual identity that covers all brand elements including logo, color palette, typography, and communications templates (Power Points, Word documents, etc.).
3. Messaging: Develop clear, compelling key messages and core narratives that articulate the Association's work, impact, and value for use across marketing and communications materials and align with the Association's updated strategic plan.
4. Website: Revise the Association website to align with newly developed messaging and visual identity and provide guidance and recommendations to allow ongoing internal management and maintenance of the refreshed site.
5. Marketing & Communications Strategy: Develop an integrated marketing and communications roadmap that identifies priority channels and tactics across social media, email, print, media, and event-based outreach; establishes core content pillars; and provides a high-level communications calendar to guide sustained engagement.
6. Measurement and Evaluation: Provide recommended metrics to assess the effectiveness of the marketing and communications strategy.

KEY DELIVERABLES

- Visual and brand identity guidelines
- Visual collateral (Power Points, Logo, etc.)
- Key messages and narratives
- Marketing and communication implementation guide and strategic calendar
- Recommended metrics to evaluate effectiveness of marketing and communication strategies

PROPOSAL REQUIREMENTS

Responses should provide a straight-forward and concise description of your ability to meet the requirements of this RFP. Emphasis should be on completeness and clarity of content. Please be sure to include the following information:

- Firm and project team overview: Background, mission, and relevant experience and qualifications of the Firm and those who would be staffed on this project.
- Approach: A detailed description of how the work will be completed and carried out, including facilitation of strategic planning sessions with staff and board (number and format to be proposed)
- Workplan and timeline: A timeline that shows major milestones and the process for completing the scope of work and achieving the deliverables within a two- or three-month time frame.

- Budget: A detailed cost proposal, including a breakdown of fees and expenses.
- Relevant past projects: Two to three examples of similar projects the firm has completed.

SELECTION CRITERIA

We will consider the following criteria when evaluating proposals:

- Demonstrated understanding of project goals and context
- Relevant experience and qualifications
- Soundness of approach and work plan
- Timeline for project milestones and completion
- Cost-effectiveness and value

Please indicate if your business is women-owned, minority-owned, and/or service- or disabled-owned.

BUDGET

The Association has budgeted a range between $15-25k for this project; however, we recognize that proposed costs may vary depending on each firm's approach to the scope of work. While cost will be a consideration in determining who is awarded the RFP, firms are encouraged to submit a budget that accurately reflects the level of effort needed to successfully deliver the project.

DURATION AND TIMING

RFP Released: Tuesday, February 10, 2026
Proposals Due: Monday, February 23, 2026
Selection and Notification: By March 13, 2026
Project Kick-off: March 16, 2026
Deadline for Completion: April 30, 2026

SUBMISSION DETAILS

Please submit proposals by 5:00 PM EST on Monday, February 23, 2026. The submission email subject line should read *RFP FOR BRAND AND COMMUNICATIONS*

- via email to Project Manager Ilana Zafran Walden at iwalden@forestzafran.org
- with a cc to Margaret Cregan at margaret.cregan@debankers.com

RESERVATION OF RIGHTS

All intellectual property developed in the course of this engagement will become the property of the Association. All data remains the sole property of the Association. The consultant shall agree to keep in strict confidence any confidential organizational information or proprietary information learned through its dealings with the Association and/or its stakeholders.

The Association reserves the right to reject any or all proposals, request additional information, and negotiate scope and fees with the selected consultant. Submission of a proposal does not obligate the Association to select a proposer. The Association assumes no responsibility or liability for costs incurred by you prior to the signing of any contract resulting from this bid and/or post-bid interviews. Further, we expect the awarded vendor to have in place liability insurance germane to the scope of its services.

During the selection process, we will consider all proposals received by the deadline. We will contact a selection of finalists for interviews, in person or by teleconference, and will provide feedback on all submissions as soon as possible following the final selection.