



**Delaware Bankers Association
Delaware Financial Education Alliance**



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Request for Proposals: Project Manager

Context

Delaware Bankers Association (DBA) is a not-for-profit membership organization of tax paying international, national and state-chartered banks, savings banks, trust companies, and banks with operations in the State of Delaware.

DBA’s key activities include:

Advocacy: Participating in legislative and regulatory affairs at the Delaware state level and partnering with other bank associations nationally to monitor federal legislation and advocate on behalf of its members.

Communication & Awareness: Communicating with and educating Delaware legislators, the media, regulatory agencies and the public on issues affecting the financial services industry. Additionally, DBA supports its member institutions with leadership and information that provides their employees, their communities, and the state of Delaware with a safe and viable financial services industry.

Education: The DBA creates, facilitates, and promotes educational and developmental programs for the benefit of their members and the community.

Over the next five months, DBA plans to undertake a strategic planning process to clarify its priorities and align resources to support them. As part of this work, DBA will also conduct marketing and branding refresh and begin onboarding and integrating a new Association Management System (AMS).

To ensure cohesion across these workstreams, DBA seeks a consultant to guide the organization in defining strategic priorities, identifying the resources needed to support them, and developing the metrics and dashboards required to track organizational and staff progress toward the priorities and corresponding milestones. As part of this engagement, the consultant will also provide project management for the marketing and branding refresh and the AMS onboarding and integration, ensuring these workstreams advance in alignment with the strategic priorities DBA establishes.

Scope

Project Management:

- Develop RFPs and manage vendor selection for:
 - Marketing and branding refresh.
 - AMS provider for capabilities build-out and implementation.
- Create and maintain a project plan covering strategy, data, AMS, and marketing/branding workstreams.
- Establish structure and cadence for project meetings across and within workstreams.
- Facilitate project meetings according to the agreed-upon cadence, including agenda preparation and documentation of follow-up actions.
- Ensure marketing, branding, and AMS work is integrated into the priorities, milestones, and implementation plan developed via the strategic planning process.

Strategic Planning

- Collaborate with the DBA CEO to design and implement a process for identifying strategic priorities, which may include desk research, staff, board, and stakeholder interviews, and refinement of existing priorities.
- Implement the process to generate a list of potential strategic priorities.
- Lead the prioritization of potential priorities using staff working sessions, research, and stakeholder input.
- Define key milestones and resource needs for each selected priority in partnership with the DBA CEO and staff.
- Produce a final strategic plan summarizing strategic priorities, milestones, and required resources.

Data & Metrics

- Identify data and metrics that will need to be captured to measure progress of the strategic plan and corresponding milestones.
- Develop a dynamic dashboard to monitor strategic plan metrics and milestones.

Timeline

The project consultant and RFP drafting will help determine the scope for these workstreams and what a realistic implementation timeline is. The DBA's goal is to have a strategic plan, metrics and dashboard, brand/marketing refresh plan, and ready-to-implement AMS by **May 1, 2026**.

Proposed Timeline

RFPs received	By December 22, 2025
Staff analysis of RFPs and finalist identified	By January 5, 2026
Project planner onboarded, plan finalized	By January 19, 2026
RFPs for strategy, data/metrics, brand/marketing issued	By January 19, 2026

Tentative Strategy, Data/metrics Timeline:

RFPs due	By January 30, 2026
Vendor selection	By February 13, 2026
Creation of project plan for strategy/metrics	By February 20, 2026
Potential strategic priorities identified*	By March 9, 2026
Prioritized strategic priorities selected	By March 23, 2026
Milestones, resources, and metrics identified	By April 6, 2026
Strategic plan and metrics reviewed by Board and finalized	By April 20, 2026
Dynamic dashboard complete	By May 4, 2026

*Timeline may shift based on desired process and staff/board/stakeholder availability

Tentative AMS and Marketing Timeline:

RFPs due	By January 30, 2026
Vendor selection	By February 13, 2026
Kick off of AMS and Marketing workstreams	By February 20, 2026
Brand/marketing review and analysis against strategic priorities	March, 2026
Pre-implementation work for AMS	March-April, 2026
Begin implementation of AMS and marketing plan*	By May 1, 2026

Cost

Please include proposed costs for project management as well as any other elements of the overall project for which you believe your organization is well-suited to satisfy. All submissions should be sent by email to Karyn.Polak@DEBankers.com with a cc to Margaret.Cregan@DEBankers.com by no later than December 22, 2026.