

REQUEST FOR PROPOSALS

Communications Strategy and Website Redesign

Delaware Bankers Association & Delaware Financial Education Alliance

Released: May 27, 2026

PURPOSE

The Delaware Bankers Association (DBA) and the Delaware Financial Education Alliance (DFEA and, together with the DBA, the “Association”) seek to engage a qualified consultant or consulting team to lead the implementation of its newly-developed brand identity and to create a strategic communications and marketing framework that advances organizational visibility, member engagement and satisfaction, and growth.

This Request for Proposals (RFP) is organized into three separate tracks, and respondents may submit proposals for one, two, or all three tracks. A single firm may be awarded multiple tracks if it demonstrates the capacity, expertise, and experience necessary to successfully execute the scope of work across those areas. The ability to collaborate with other firms or individuals as needed to deliver an efficient, holistic work product reflecting all three tracks in sum is a critical element of this RFP.

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 taxpaying 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 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 Association operates with a staff of five and serves 45 member institutions and 70 associate members. Collectively, the Association serves its mission through four pathways — which also represent the core pillars of the Association’s newly adopted three-year strategic plan:

- **Advocate:** The Association serves as the voice of Delaware’s financial industry, helping to shape and advance legislation and regulations that benefit both member institutions and Delaware residents while supporting the continued growth of a strong and healthy economy. The organization maintains active representation at both the state and federal levels on issues impacting Delaware financial institutions—from Trust Act updates to emerging stablecoin legislation.

- **Educate:** The Association serves as a trusted source of information for both its members and the public at large. It supports members in navigating an ever-evolving regulatory and technological landscape, welcomes newcomers into the field, helps cultivate talent within member organizations, and promotes financial literacy for consumers of all ages. The Delaware Trust Conference, now in its 21st year, along with American Bankers Association courses, OnCourse Learning programs, and other training offerings which further advance these efforts.
- **Collaborate:** Active committees, topical roundtables, and growing cross-disciplinary partnerships help Delaware institutions learn from one another and address shared challenges. The Association fosters dialogue among individuals and member organizations, encouraging the exchange of new ideas and best practices. It also convenes leaders from both the financial industry and other sectors to provide more holistic support to members and create a forum for addressing broader societal issues.
- **Convene:** The Association fosters meaningful connections that strengthen both professional relationships and community ties across Delaware’s financial services sector. Through networking opportunities and social engagement, it helps build strong inter-corporate and interpersonal relationships at every level—from emerging professionals to senior executives. Signature programs and events—including the Annual Meeting & Dinner, Women Connect events, the Washington Visit, and a robust year-round events calendar—help keep the financial services community connected and engaged.

PROJECTS OVERVIEW AND CONTEXT

In May 2026, the Association adopted a new visual identity, organizational messaging framework, and three-year strategic plan organized around the four pillars described above. The Association is now seeking consultants to (1) develop a comprehensive communications and marketing strategy that aligns with and supports the successful implementation of this strategic plan and (2) redesign the Association’s website to reflect its new visual identity and support broader communications, marketing, and member engagement goals. Year-one implementation priorities under the strategic plan are currently being finalized and will be shared with the selected firm(s) at project kickoff.

The selected firm(s) will have access to a robust body of stakeholder feedback, research, and discovery findings completed in Spring 2026 as part of the Association’s strategic planning and branding refresh initiatives, including the full brand identity guidelines and messaging framework.

Organizational Context and Urgency

The retirement of the Association’s long-tenured marketing and public relations professional, effective May 31, 2026, creates both urgency and opportunity. In the near term, the Association requires interim communications support to maintain communications operations while the strategic and communications work described in this RFP is completed (Track A). Over the medium term, the Track B communications strategy will inform a reassessment of the Association’s internal staffing structure and vendor relationships—making the capacity recommendations in Track B especially consequential. Firms

should approach this engagement with an understanding that their work will directly shape how the Association rebuilds its communications function.

AMS Transition

The communications strategy and website redesign will occur concurrently with the Association’s transition to a new Association Management System (AMS). The Association is actively evaluating AMS platforms and anticipates making a final selection in the near term. The team selected for the website redesign and rebuild (Track C) will be briefed on the chosen AMS platform prior to contract execution and will be expected to work closely with Association staff and the project management consultant to ensure alignment and integration between the AMS implementation, website functionality, and the broader communications and marketing strategy. Proposers should describe their experience with AMS integrations generally and flag any platform-specific assumptions in their proposals.

Proposed Project Sequencing

The Association anticipates the following phased approach, with all work to be substantially complete by December 2026 to support a January 2027 rollout:

- **Track A (immediate): Interim communications support** begins as soon as a vendor is selected, bridging the staff transition and running concurrently with Tracks B and C.
- **Track B (priority): Communications and marketing strategy** work begins promptly and concludes by approximately October–November 2026. Track B is the Association’s foundational investment in this RFP; its outputs—particularly the communications roadmap and capacity recommendations—will directly inform the website strategy and long-term staffing decisions.
- **Track C (follows Track B): Website redesign and rebuild** proceeds on a timeline informed by Track B outputs, with completion targeted for December 2026. Proposals should address how Track C work can be fast-tracked without sacrificing quality, given this deadline. Firms awarded both tracks should describe their approach to managing sequencing dependencies.

Firms are encouraged to propose realistic timelines. The December deadline is firm; proposals that achieve it through scope compression rather than efficient execution will be evaluated accordingly.

SCOPE OF WORK

Track A: Interim Communications & Marketing Support (Short-Term)

The retirement of the Association’s marketing and public relations professional, effective May 31, 2026, has created an immediate operational gap. Track A is designed to fill that gap on a short-term basis while the strategic work of Tracks B and C is completed, and the Association assesses its long-term staffing and vendor structure—an assessment that will be directly informed by the capacity recommendations produced under Track B.

Track A is explicitly a bridge arrangement, not a long-term retainer. The initial term will be three to six months, with the expectation that the Track B deliverables will provide clarity on whether and in what

form ongoing support is needed after that period. Track A should be proposed as a monthly retainer with a defined scope and estimated hour commitment, plus an hourly rate for out-of-scope requests.

Services under Track A may include any or all of the following:

Publication Content and Design Support: As requested, support Association staff in copyediting content and designing publications such as the weekly Digest and quarterly Delaware Banker Magazine. Platforms currently in use include Constant Contact and Adobe InDesign.

Website Updates: Support Association staff in making updates to the current Association website during the transition period prior to the launch of the rebuilt site under Track B.

Administrative Communications Support: Maintain and update key contact and distribution lists; perform email list hygiene and database management; support the scheduling and distribution of communications to ensure accurate, timely delivery to appropriate audiences.

Track A may be awarded independently or to the same firm awarded Track B and/or Track C. Firms applying for Track A only should describe their experience with trade association or nonprofit communications operations and their availability to begin work promptly. The Association is particularly interested in firms that can provide continuity between Track A interim support and the strategic work of Track B.

Track B: Communications and Marketing Strategy (Priority Track)

Track B is the Association's foundational investment in this engagement. Its outputs will serve as the strategic foundation for the website rebuild (Track C) and for the Association's long-term communications and staffing structure. Proposals for Track B should reflect this weight and propose a process rigorous enough to produce durable, actionable deliverables.

Marketing Segmentation & Membership Analysis: Conduct an analysis of the Association's current and prospective audiences to identify engagement patterns, member needs, and growth opportunities. The assessment should evaluate membership categories and key stakeholder groups, including the impact of segmentation on recruitment, retention, sponsorships, event participation, communications, and member value. The consultant will define key audience segments and recommend tailored messaging, content, programs, communications channels, and engagement strategies for both internal and external audiences.

Communications Audit: Conduct a comprehensive audit of current Association communications channels and publications, including but not limited to the weekly digital Digest, quarterly Delaware Banker Magazine, email communications, social media, and external messaging materials. Assess the purpose, audience, format, effectiveness, and alignment of each communication vehicle with organizational goals and member needs. Provide recommendations for optimizing publication strategy, content development, frequency, branding consistency, and audience engagement moving forward.

Communications & Marketing Roadmap: Develop a 12-month integrated communications and marketing strategy—including a detailed editorial and marketing calendar—aligned with the Association's strategic plan, messaging framework, and visual identity. The roadmap should identify target audiences, key messages, goals, and tactics across digital, print, media, events, email, and social channels. It should also include content pillars, engagement strategies, performance metrics, and

implementation recommendations to support brand consistency, member engagement, and organizational visibility, with a high-level framework extending through the three-year strategic plan horizon.

Communications & Marketing Capacity Recommendations: Provide recommendations for the staffing and vendor structure needed to successfully implement and sustain the Association’s communications and marketing strategy. Given the recent retirement of the Association’s marketing and public relations professional, these recommendations are especially critical and should address: the appropriate internal staffing model for an organization of five; which functions are best managed in-house versus automated or outsourced; and a phased roadmap for rebuilding the Association’s communications capacity in alignment with the strategic plan and available resources.

Timeline: Track B proposals should reflect a four- to six-month engagement, with completion targeted by October–November 2026. The Association’s concurrent transitions (staff, AMS, brand) will require meaningful stakeholder access; proposals should include a realistic schedule for discovery, drafting, and review cycles.

Track C: Website Rebuild

The Association’s current website is hosted on a basic platform without a dedicated content management system. The Association currently manages its own DNS records, SSL certification, and on-site SEO. Going forward, the Association strongly prefers that these functions be managed by the website platform provider or the AMS system, reducing the technical burden on a small internal staff. Proposals should reflect this preference in their platform recommendations.

Because the Association has no existing CMS to migrate from, Track C is less a migration project and more a ground-up build—which simplifies some elements while requiring careful platform selection. The selected platform should be genuinely manageable by non-technical staff for routine content updates without ongoing outside support.

Website Platform & Functionality Recommendations: Assess the Association’s website needs and recommend an appropriate platform, site architecture, and functionality framework. Recommendations should address: required features and integrations (with particular attention to the AMS); management of the domain, security certificate, and search engine visibility by the platform or provider rather than by Association staff; content management needs for a five-person, non-technical staff; user experience and accessibility; navigation and information architecture; and scalability over the three-year strategic plan period. Where relevant, proposals should evaluate whether the selected AMS includes website functionality that meets the Association’s needs, or whether a separate platform is more appropriate.

Website Design & Build: Design and build a new website aligned with the Association’s brand identity, organizational messaging framework, and communications and marketing strategy. The redesigned website should clearly communicate the Association’s mission, work, and impact while serving as an accessible, user-friendly resource hub for member organizations and stakeholders. The website may include features such as event calendars and registration tools, a legislative bill tracker, member resources, and other engagement-focused functionality. Proposals should distinguish between features included in base scope and those that constitute add-ons, with associated cost estimates.

Mobile Optimization: Ensure the redesigned website is fully optimized for mobile viewing and functionality through responsive design and improved usability across devices, including facility with events registration and calendar access.

All Track C proposals must address the following technical requirements:

- **Accessibility:** Accessibility: The site must be usable by people with disabilities, including those relying on screen readers or keyboard navigation, in compliance with established federal web accessibility standards. The vendor must test for compliance and provide documentation confirming the site meets these requirements before launch.
- **Search engine visibility:** The site should be built so that search engines can find, index, and accurately represent Association pages. Page titles, descriptions, and site structure should be set up correctly from the start and maintained automatically by the platform—not requiring ongoing manual attention from Association staff.
- **Domain and security management:** The vendor or platform provider should manage the technical infrastructure that connects the Association’s web address to the site and maintains the security certificate that protects visitor data (displayed as the padlock icon in browsers). Association staff should not need to manage these.
- **Website analytics:** The vendor should configure a web analytics tool to track site traffic, visitor behavior, and content performance, and provide a basic reporting view that Association staff can use to monitor the site without technical expertise.
- **Performance:** Site speed and responsiveness: The site should load quickly and respond smoothly across devices and connection speeds. The vendor should optimize performance to meet current industry standards and test accordingly before launch.
- **AMS Integration:** Describe your experience with AMS integrations and your general approach to ensuring the website and AMS work together effectively. The Association will share the selected AMS platform with finalists prior to contract execution. Flag whether AMS integration is included in your base scope or priced separately.

Website Handover and Training: Provide training and documentation for designated Association staff on all aspects of ongoing website management, including content updates, platform administration, and maintenance best practices. The rebuilt site should be fully manageable by internal staff for routine content without requiring ongoing outside technical support. Proposals should include a minimum 60-day post-launch support window covering bug fixes and minor adjustments at no additional charge. Extended maintenance options should be described and priced separately.

Timeline: Track C proposals should target completion by December 2026 to support a January 2027 rollout. Because Track B outputs will inform the website strategy, the Association anticipates Track C work beginning in earnest once the communications roadmap is substantially complete. Proposals should describe how this sequencing is accommodated and what, if any, Track C work can proceed in parallel with Track B.

PROPOSAL REQUIREMENTS

Responses should provide a straightforward and concise description of your ability to meet the requirements of the track(s) applied for. Emphasis should be on completeness, specificity, and demonstrated understanding of the Association’s context. All proposals must include:

- **Tracks applying for:** State whether applying for Track A, Track B, and/or Track C. If applying for multiple tracks, describe your approach to integration and any collaboration with subconsultants or partner firms.
- **Firm and project team overview:** Background, mission, and relevant experience of the firm and the specific individuals who would be staffed on this project.
- **Demonstrated understanding of context:** Describe your understanding of the Association’s situation—the concurrent brand launch, staff transition, AMS selection, and strategic plan implementation—and explain how your approach accounts for these dynamics.
- **Approach and methodology:** A detailed description of how the work will be completed, including your process for discovery, stakeholder engagement, deliverable development, and review/approval cycles.
- **Workplan and timeline:** A project timeline showing major milestones. Proposals must demonstrate how all awarded work will be substantially complete by December 2026. For Track A, describe the proposed monthly engagement structure and earliest available start date.
- **Budget:** A detailed cost proposal with a breakdown of fees and expenses by deliverable or phase. For Track A, provide a proposed monthly retainer rate, estimated monthly hours, and an hourly rate for out-of-scope work.
- **Relevant past projects:** Two to three examples of similar projects completed in the past three years, including client type (trade association, nonprofit, etc.), scope, outcomes, and a reference contact.
- **Business diversity:** Please indicate whether your firm is women-owned, minority-owned, and/or service- or disabled-veteran-owned, and whether it is Delaware-based.

PRE-PROPOSAL PROCESS

Given the complexity of this engagement and the number of concurrent organizational transitions, the Association will hold a virtual Q&A session for interested firms and will distribute written responses to questions about the RFP.

- **Deadline for RFP Questions (submit via email to iwalden@forestzafran.org):** Submit by June 4, 2026, 5:00 p.m. EST.
- **Virtual Q&A Session:** Friday, June 5, 2026 at 11:00 a.m. EST, register [here](#) to attend.
- **Written Q&A Responses Posted:** Monday, June 8, 2026 by 6:00 p.m. EST [here](#).

Proposals will be evaluated by an internal review committee using the following weighted criteria:

Criterion	Description	Weight
Understanding of context and goals	Demonstrated grasp of the Association’s strategic priorities, brand transition, staff transition, and the sequencing logic of this engagement.	25%
Soundness of approach and work plan	Clarity, realism, and rigor of proposed process and deliverables, including how the firm handles sequencing across tracks and collaboration with other awarded firms.	25%
Cost-effectiveness and value	Budget reflects the actual level of effort; pricing is transparent, competitive, and realistic for the scope proposed.	25%
Relevant experience and qualifications	Track record with trade associations, member associations, or similarly sized nonprofits; experience with AMS integrations and/or organizational brand transitions.	20%
Diversity and Delaware presence	Women-, minority-, or veteran-owned certification and/or Delaware-based firm.	5%

The Association anticipates selecting two to four finalists for interviews (in person or by video conference) following initial proposal review. All finalist applicants will receive feedback following final selection. The Association reserves the right to award any combination of tracks, split awards among multiple firms, or decline all proposals.

BUDGET

Budget guidance for each track is as follows:

- **Track A (Interim Communications Support, 3–6 month initial term):** \$2,000–\$5,000/month. The initial term will not exceed six months. The Association will reassess its ongoing support needs following delivery of Track B capacity recommendations.
- **Track B (Communications and Marketing Strategy — Priority):** \$25,000–\$40,000. This range reflects the full scope of deliverables described, including segmentation analysis, communications audit, integrated roadmap and editorial calendar, and capacity recommendations.
- **Track C (Website Rebuild):** \$25,000–\$50,000. Because the Association is building from a basic platform with no existing CMS, and because the new site will be a ground-up build on a managed platform, proposals at the lower end of this range are realistic for firms with strong platform partnerships. AMS integration scope and complexity will affect final pricing; proposals should clearly distinguish base scope from add-ons.

Firms proposing multiple tracks may propose a combined budget reflecting efficiencies from an integrated engagement. While cost is a meaningful factor in evaluation, the Association is primarily seeking the firm or firms best positioned to deliver high-quality, strategic work within a realistic budget—not the lowest bidder.

DURATION AND TIMING

All work under this RFP must be substantially complete by December 2026 to support a January 2027 rollout. Track A interim support is expected to begin as soon as a vendor is selected. The anticipated project calendar is as follows:

RFP Released	Wednesday, May 27
Virtual Q&A Session	Friday, June 5, 11:00 a.m. EST
Q&A Responses Posted	Monday, June 8 by 5:00 p.m. EST
Proposals Due	Friday, June 12, by 5:00 p.m. EST
Finalist Interviews	June 17 – June 25
Selection & Notification	Friday, June 26 by 5:00 p.m. EST
Track A & B Start / Project Kickoff	Week of July 6

Track B target completion: October–November 2026. Track C target completion: December 2026. Track A initial term: not to exceed six months from start date.

SUBMISSION DETAILS

Please submit proposals by Friday, June 12, 2026, 5:00 p.m. EST. The submission email subject line should read: RFP FOR MARKETING AND COMMUNICATIONS [TRACK(S) A/B/C].

Submit via email to:

- **Project Manager: Ilana Zafran Walden — iwalden@forestzafran.org**
- **CC: Margaret Cregan — margaret.cregan@debankers.com**

Proposals should be submitted as a single PDF or Word document. If submitting for multiple tracks, clearly delineate each track’s scope, approach, timeline, and budget.

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 will maintain strict confidentiality regarding all organizational information, member data, and proprietary materials learned through this engagement and will not disclose such information to third parties without prior written consent.

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 prior to the signing of any contract. The awarded vendor will be required to carry liability insurance appropriate to the scope of services, including professional liability (errors & omissions) coverage; proof of insurance will be required prior to contract execution.

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.