



Request for Proposals
Branding and Messaging Agency

Proposals Are Due by JULY 12, 2024

Via email to Heidi Worley at hworley@populationinstitute.org

Questions about the request for proposals (RFP) should be sent to
hworley@populationinstitute.org

REQUEST FOR PROPOSALS FOR BRANDING, MESSAGING, LOGO, AND GRAPHIC STANDARDS

Summary

Population Institute (PI) seeks proposals from qualified agencies to facilitate a process that will result in the following:

- Branding and messaging strategy
- Key organizational messages
- Logo design
- Visual guidelines (visual style guide)

The selection of an agency will be made based on evaluation and determination of the relative ability of each to deliver quality service in a cost-effective manner. The following specific criteria will be evaluated and must be addressed in the proposal:

- History and experience
- Price
- References
- Work samples

Proposals should be no more than **five pages** excluding budgets, timelines, and references.

Rationale

The Population Institute (PI) recently completed a process to review and finalize its core functions, theory of change, and key performance indicators. As a result of this process, PI recognized the need for enhanced communications expertise and a communications strategy that advances the mission of the organization, enhances our thought leadership profile, and effectively reaches target audiences identified in PI's theory of change.

As PI moves forward with these articulated goals, we want to modernize, unify, and create clear and cohesive messages for our staff, members, and stakeholders about our work and demonstrate a fresh, modern look and feel to our funders, partners, and stakeholders, across marketing channels and branded materials. *An organizational name change is NOT in the scope of this work.*

Why Now?

- PI is seeking to raise its profile and image with key audiences, especially U.S. policymakers and journalists.
- The recent theory of change propelled the importance of fine-tuning messages about our work to differentiate PI from others working on similar issues.
- Defining clear messaging and visual guidelines will provide much-needed guidance to our entire staff.

Consider the following when reviewing the PI logo, designs, and messages (*see attached theory of change narrative; please also refer to PI's vision, mission, and values statement on our website*):

- Key organizational messages should be shareable with/usable by staff, Board, Fellows, and partners. Consideration of the best format for these key messages should be clearly articulated.
- We need clear naming conventions, graphic standards, and defined palettes for PI sub-brands, rePROs Fights Back and FP/Earth, as differentiated from PI's brand.
- A new logo could include a tagline to holistically reflect organizational priorities.
- A few additional key considerations for the logo include the following. The logo should be:
 - Optimized for mobile and social media friendly on a variety of platforms.
 - Represent the organization's dual domestic and international focus.
 - Able to be reproduced in both large-scale (trade show banners) and small-scale artwork (mobile app art).
 - Flexible to both print and electronic media.
 - Function as a reverse-out.

Scope of Work

PI seeks a partner with a proven track record for creative excellence in brand development and messaging to develop a process and strategy to engage stakeholders in a branding and messaging initiative. The overarching goal is to have an agency:

- Assess the impact (positive or negative) of rebranding PI while building consensus among stakeholders.
- Develop a brand platform for PI, including positioning, alignment, personality, promise, differentiation, and value proposition.
- Develop an architecture to support current brands and relationships between brands as they travel across marketing channels and programs.
- Create an updated visual brand identity and naming conventions for sub-brands and future programs.
- Provide design templates for PI communications channels and programs.
- Develop graphic standards for use by PI's design team and editorial staff (visual style guide).
- Develop messaging guidelines and/or key organizational messages document/tools.

The branding and messaging process should include:

- Discussions with staff about current branding and messaging challenges and future projects.
- Development of a project timeline and approval processes.
- A brief review of key competitor assets.
- A limited number of interviews (perhaps 5-7) or a survey of a representative sample of key stakeholders. This may include members of the leadership team, Board of Directors, Senior Fellows, and partnering organizations.
- PI staff may be called upon to assist in this effort where appropriate.
- Three to five logos for final review by leadership.
- Once the final logo and messages are finalized, creation of graphic standards and style guidelines, templates, and usage examples for digital marketing, donor appeals, social media, and PI sub-brands.
- Creation of messaging guidelines or a key organizational messages document/tool for staff, Board, and Senior Fellows.
- Creation of a plan for rolling out the new look and feel across all PI properties and channels to various PI audiences. The actual implementation will be handled by PI's internal staff.

Proposal Submission and Selection Timeline

- May 29, 2024: RFP Issued
- June 14, 2024: Vendors notify PI of interest to participate
- July 1-9, 2024: Opportunity to schedule Q&A call/meeting
- **July 12, 2024: Proposals Due**
- July 26, 2024: Internal target date for review of proposals, notification of status, and discussion with finalists
- July 31, 2024: Finalists interviews
- August 5, 2024: Selection of agency
- August 12, 2024: Commencement of work
- November 15, 2024: Desired completion of work

Note: Prospective agencies may arrange a conference call to discuss the RFP with PI during the week of July 1-9, 2024. To arrange a call, email hworley@populationinstitute.org.

Timeline

The agency should be available to conduct the work during the fall of 2024.

Expected Role of the Agency

The agency shall have proven experience and knowledge in all facets of the work required to help PI establish its branding and messaging strategy, logo design, visual guidelines, and key organizational messages. Specifically, the agency will, as needed, assess PI's operations, communications, and needs; gather and synthesize relevant information; convey concepts; facilitate groups; and conduct key informant interviews.

Confidentiality

This RFP contains confidential information that is the property of Population Institute, which is provided for the sole purpose of permitting the recipient to respond to the RFP. The recipient agrees to maintain such information in confidence and not to copy nor disclose this information to any person outside the group directly responsible for responding to its contents. The contents of this document may not be used for any purpose other than preparation of a response to this RFP.

ABOUT POPULATION INSTITUTE

The [Population Institute](#) (PI) is a Washington, DC-based nonprofit research and advocacy organization. Our mission is to improve the health and well-being of people and the planet by supporting policies and programs that promote sexual and reproductive health and rights (SRHR). We educate policymakers, the media, and the general public about the essential importance of achieving gender equality and promoting SRHR; the personal, social, and economic benefits that arise from expanding access to family planning services and information; and the impacts of population dynamics on the environment, natural resources, biodiversity, hunger, and poverty. PI is committed to values of sexual and reproductive health and rights; empowerment of women and girls; sustainability; social, racial, and reproductive justice; and evidence-based analysis.

PI analyzes complex SRHR issues with an evidence-based approach, connecting them to policy solutions. PI amplifies research findings and partner initiatives to inform and influence key decision-makers for improved SRHR policy. Focusing on building champions, PI educates and cultivates spokespersons across multiple sectors, providing platforms for engagement and thought leadership.

The organization is made up of a small team of professional staff with research, advocacy, and non-profit management skills, as well as a roster of senior fellows with expertise in demography, foreign policy, and reproductive rights. We work to identify opportunities to influence policies and programs by communicating evidence-based analysis and creating platforms to amplify voices of practitioners, advocates, and scholars.

PI's Justice, Equity, Diversity, and Inclusion (JEDI) work is integral to the mission and operations of the organization. To date, JEDI work has included monthly educational sessions for board, staff, and fellows, and moving forward, PI seeks to incorporate JEDI principles into guiding institutional policies—from internal processes affecting staff and the workplace to external processes affecting programming and communications. These policy goals will strengthen PI's commitment to guiding principles and support equity in the organization.

PROPOSAL REQUIREMENTS

Please include the following proposal sections:

1. Understanding (Up to 500 Words)

Present a concise overview of your understanding of the concepts and development of branding and messaging strategy, logo design, and visual guidelines in nonprofit organizations.

2. Proposed Scope of Work (Up to 2,500 Words)

Describe your proposed scope of work, timeline, and implementation plan for the following:

- Assessing, as needed, PI's operations, communications, and needs.
- Gathering and synthesizing information from individuals and groups, data, and descriptive information, including through group facilitation and key informant interviews.
- Conveying concepts about branding and messaging, logo design, and visual guidelines in easy-to-understand language.
- Managing overall project, timelines, milestones, billing, and invoicing.
- Developing and finalizing deliverables to include:
 - Branding and messaging strategy
 - Key organizational messages
 - Logo design
 - Visual guidelines (visual style guide)

3. Organizational Experience (Up to 500 Words)

Describe your experience in successfully carrying out the work outlined in the Scope of Work above, including experience in helping nonprofits articulate the following:

- Comprehensive branding and messaging strategy
- Key organizational messages
- Visual guidelines

Additionally, include any experience working with organizations that specialize in any of the following areas:

- Sexual and Reproductive Health and Rights
- Empowerment of Women and Girls

- Sustainability
- Social, Racial, and Reproductive Justice

4. Background of Proposed Agency

Company Overview, History, and Organization

Please provide a brief agency or professional history, organizational summary, and portfolio (or direction to an online portfolio) of past work. Provide the following for your company:

- Address
- Telephone number
- Contact person
- Title
- Person authorized to contractually bind the organization for any proposal against this RFP
- Year established and number of years your company and any joint proposal partner have been offering graphic design, advertising, public relations, or website design

For each individual you are proposing to contribute to this work:

- Include a bio (up to 500 words each) that summarizes relevant qualifications and experience.
- Attach a resume (as an appendix) that reflects relevant qualifications and experience and summarizes the individual's work and educational history.

5. Appendices

Include the following as appendices:

- Resumes of each proposed individual.
- Two references from organizations that can provide evidence of the following:
 - Your experience providing similar work for.
 - Your ability to complete projects that reflect high-quality, on-time work that is consistent with the agreed upon scope of work.
- A sample of relevant products.

For each reference, including the following information:

- Organization name
- Address
- Type of organization
- User contact(s) (two if possible)
- Title(s) of user contact(s)
- Telephone number(s) and email address(es) of user contact(s)
- Description of project
- Previous logo (if any) and final logo/ branding guidelines

6. Budget

PI anticipates that the budget for the scope of work outlined above should be somewhere in the range of \$20,000 to \$30,000. PI would like to partner with an agency that can guide this project while also leveraging existing staff resources to assist with the project. For example, staff might be asked to compile samples of competitor assets.

Provide the following:

- A breakdown of the rate structure (level of effort, hourly rates, etc.) for each proposed task.
- The total budget for completing the work.
 - PI desires an all-inclusive price/cost quote that covers all costs related to the project, including a kick-off meeting with staff, a brief review of competitor assets, interviews or surveys with stakeholders to assess the impact of rebranding, development of three to five logos for leadership review and feedback, fonts, graphics, templates, and sub-brands as outlined above. Please note that the final implementation of carrying the new look and feel across PI sub-brands, online properties, and marketing channels, as well as a branding campaign to PI audiences, will be implemented by in-house staff.
 - Please include a fee breakdown by project phase. Costs should be broken out by individual line items, including graphic design, project management, equipment and materials, out-of-pocket expenses, etc.

EVALUATION CRITERIA

Population Institute will evaluate each proposal based on the following criteria.

Criteria	Criteria	Evaluation Points
Understanding	A clear understanding of branding and messaging strategy, logo design, and visual guidelines development in nonprofit organizations.	10
Scope of Work	A thorough, sound, and feasible scope of work, timeline, and implementation plan.	50
Organizational Experience and Background(s)	The breadth and depth of demonstrated expertise and experience in organizational performance, particularly with branding and messaging strategy, logo design, and visual guidelines in nonprofits.	15
Cost Reasonableness	A clear, thorough budget and rate structure that reflects realistic resources required for producing high-quality work at a reasonable cost.	25

Proposal Evaluation and Submission

Award of the contract resulting from this RFP will be based on the most responsive vendor whose offer will be the most advantageous to PI in terms of brand awareness as specified in this RFP. However, PI reserves the right in its sole discretion and at any time to:

- Reject any or all offers and discontinue this RFP process without obligation or liability to any potential respondent.
- Accept other than the lowest price offered.
- Award a contract based on initial offers received, without discussion or requests for best and final offers.
- Award to more than one respondent.

Proposals may be emailed to:

Heidi Worley
hworley@populationinstitute.org

Due Date: All proposals are due by 5 p.m. EST on July 12, 2024.