

REQUEST FOR PROPOSAL: STRATEGIC MARKETING, CREATIVE SERVICES & PRODUCTION SERVICES

1. Introduction to Jefferson Credit Union (JCU)

With four branches and a community charter covering seven counties (Jefferson, Shelby, Bibb, Tuscaloosa, Walker, Blount and St. Clair), Jefferson Credit Union (JCU) is the longest running credit union in Alabama with an original charter dating back to 1928.

JCU is owned by ordinary people who work together as members to help each other achieve financial success and live well. Though the original charter welcomed county employees of Jefferson County, we've expanded and are now community-based. In 2025, we merged in Alabama Law Enforcement Credit Union (ALLECU). ALLECU started in 1939 and served sworn law enforcement officers in the state of Alabama.

Members trust us because we have qualified, stable management; and we're a local, member-owned cooperative. The money they save is used to fund loans for themselves and other members who borrow to buy houses and cars, to pay for their children's education and many other worthwhile purposes. In addition to loans and savings, JCU adds value to membership by offering a variety of modern banking services.

JCU values its suppliers as critical members of our team and is seeking to enter a productive relationship with a vendor (or vendors) to achieve the contract goals identified in this document. Benefits of this relationship are anticipated to be received by both the vendor(s) and JCU due to shared administrative cost savings, efficiencies, economies of scale and improved planning by contracting for JCU's marketing communications needs for the next 12-36 months.

The objective of this RFP is to provide JCU with proposals from qualified vendors capable of carrying all scopes defined. The subsequent proposals will form the basis for evaluation, interviews with short-listed candidates and final selection.

2. JCU's Activities in 2025 & Goals for 2026 and beyond

At present, JCU's marketing calendar is broken into 3 key segments:

- Product Campaigns (Mobile App, Checking Accounts, Lending, Certificates)
- General Campaigns (Brand, Holiday Closures, Annual Meeting)
- Community Campaigns (Participation in Community Events)

Moving forward, JCU is focused on pursuing an inbound, customer segmented approach to its marketing – a strategy that may dramatically alter our marketing activities in the future.

The overall strategy for marketing in 2026 and into 2027 is to provide JCU with a framework to link all marketing activities to four goals identified by the organization and the Board of Directors during its 2026 strategic planning session:

1. Grow Membership by 3%
2. Decreased Closed Accounts 10%
3. Grow Loan Balances by 2%
4. Increase Products per Member by 25%

3. Submission Details

The submission deadline is July 31, 2026, at 5:00 pm CT.

To receive consideration, all submissions must be received before the noted closing date and time. Multimedia and visually supported proposals are encouraged. Please submit the full contents required for your proposal as PDF or digital presentation via email with the subject "Jefferson CU Marketing RFP 2026" to:

- Richard Morris, CEO rmorris@jeffersoncreditunion.org

All submissions, other than proposals withdrawn before the closing date of the RFP or late proposals, shall become the property of JCU and will not be returned to the sender. Proposals shall be open for acceptance up to 30 days following the submission closing date, and late submissions will be unopened.

JCU is not under any obligation to select a vendor and may modify the terms of or cancel this RFP at any time for whatever reason(s) and without liability to the vendor(s) or anyone else.

Vendors are solely responsible and without recourse to JCU for their expenses in preparing and submitting a proposal and for otherwise participating in the RFP process. It is the responsibility of responding to vendors to ensure they have all the components of the RFP package, including any appendices and subsequent addenda. Amendments to proposal submissions may be made before the closing date and time. Amendments must be submitted in writing.

4. Scope of Services Required

The services required have been categorized into 3 categories of services or "work scopes" required by JCU:

- Strategic Marketing
- Production Services
- Creative Services

5. Selection Process

We operate with integrity as a transparent, equal opportunity employer and partner, committed to fostering diverse and equitable professional relationships. The selection process will consist of an initial evaluation of submitted bids and related documentation. From this evaluation, a shortlist of suitable vendors will be prepared. These vendors will be contacted for an on-site or virtual presentation. The successful vendor will be chosen through a final evaluation process, reference checks and where needed, and additional questions to assess the viability of a long-term partnership.

6. Evaluation Criteria

In choosing a vendor (or vendors) to satisfy our various marketing objectives, we will determine the best value offered to JCU by evaluating individual proposals against the following criteria:

- Understanding and appreciation of the JCU brand and the uniqueness of the Credit Union model.
- Capabilities in terms of research, strategic thinking, creative execution, online expertise, promotion and publicity, as well as the overall depth of experience exhibited by your team.
- A commitment to cost efficiencies, budget maintenance, value-added services and the ability to realize savings in printing, media buying, etc.
- Commitment to understanding and achieving JCU's overall business objectives, with a results-oriented mentality backed by solid metrics and a willingness to welcome client input and ideas.
-

7. Acceptance and Rejection of Proposals

Notwithstanding any other provision in these proposal documents, any practice or custom in the industry, JCU, in its sole discretion, shall have the right to:

- Accept any proposal.
- Reject any proposal.
- Reject all proposals.
- Accept a proposal which is not the lowest-priced proposal.
- Reject a proposal which is the only proposal received by JCU.
- Accept all or any part of the proposal.
- Award all or a portion of the Work of any Vendor.

Proposals which contain qualifying conditions or otherwise fail to conform with the requirements of the RFP may be disqualified or rejected. JCU may, however, in its sole discretion, reject or retain for its consideration Proposals which are non-conforming because they do not contain the content or form required by the RFP.

8. Proposal Format

All vendors are requested to provide the following information with their submissions and in the order that follows:

a. Company Information

Please include the following company information:

- Name and address of the head office or local office submitting the proposal.
- Years in industry and a brief history of the company.
- Corporate vision, mission and values.
- The total number of employees

b. Client Information

Please provide the following client information:

- How do you typically approach a client's business and how do you add value?
- Provide 2 examples/cases that highlight a project from customer objectives through to business results.

c. Project Team, Relevant Experience and Methodology

This section addresses the vendor's experience with comparable projects, methodology, and the relevant expertise of the proposed team. Please include the following information:

- Bios of the Team, including the scope of expertise, years of experience, etc.
- Your typical process with clients, from the beginning of a campaign to the end.
- Your current processes, systems and/or methodology for measuring the success of a campaign, return on investment and meeting business outcomes.
- Knowledge, understanding and any relevant experience in the credit union industry or retail financial industry and/or similar industries.

d. References

Vendors are requested to include 3 to 5 references in their proposal. Please include the name of the organization, the contact person and position, telephone number, street address, email address and corporate website, if applicable.

References should be drawn from projects of similar size, application and scope. References may be contacted by JCU, and any information received may be used to assist the evaluation committee to determine the vendor's ability to successfully deliver the services outlined in this RFP.

e. Samples of Work

A portfolio with samples of relevant material may be submitted with the vendor's RFP response. The portfolio will be held with strict confidence and returned upon request within 30 days of the RFP closing date.

f. Pricing

Vendor proposals should include a breakdown of the pricing methodology for all services, as well as a pricing breakdown for the sample service bundle, itemized per product/service:

PRICING METHODOLOGY FOR SERVICES

Vendors are requested to provide pricing methodology such as hourly rate per skill set, lump-sum pricing, print management fee, contract management fee, etc. and how they plan to share savings with JCU such as discounts, rebates or any other creative cost-sharing options.

PRICING FOR SAMPLE SERVICE BUNDLE

A bundle of materials covering each category is outlined below for vendors to provide a sample pricing breakdown. Please provide detailed estimates for the bundle, including but not limited to strategic planning, creative development, production, print management and any contract management for the development of the following campaign collateral materials:

SAMPLE PRICING EXAMPLE - Campaign Deliverables:

- 24" x 36" full color posters (series of 3 different posters)
- 1920px X 1080px digital screen (static or motion)
- Direct Mail Buck slip handouts (including production and distribution)
- Social Media post planning (series of 3 different posts)
- 300px X 600px / 300px X 250px Google ad (static or motion)
- Blog Article
- Supply of final layered artwork in full

9. Ownership of Work

JCU shall own all rights, title and interest in any documentation, products, collateral, intellectual or point of sale materials, advertising for radio, print, Internet or other media, or deliverables which result from services rendered by the selected vendor(s) to JCU. For all purposes of copyright law, the work shall be deemed works made for hire of JCU and copyright shall belong solely to JCU. The successful vendor(s) represents and warrants that all work shall be free of any claim of any third person or entity based on patent or copyright infringement, trade secret misappropriation, or otherwise.

10. Confidentiality

The vendors shall hold confidential all information and data received from JCU in connection with the RFP except insofar as such information is required to be disclosed by law or court order. The vendors shall not use or disclose any information to anyone without JCU's written approval except as and only to the extent necessary for the preparation of its proposal and, if awarded to the vendor, for the performance of the Work.

JCU will hold confidential all information received from vendors responding to the RFP to the extent permitted by law.

11. Contract

Upon completion of the evaluation process, negotiations may be undertaken to refine the details of a contract. (the "Agreement" outlining the specific terms and conditions for delivery of the products and services for the project).

The Agreement shall be governed by, subject to, and interpreted by the laws of the Alabama. At the discretion of JCU, the Agreement may include this RFP, the Vendor's proposal in whole or in part, accompanying data, and any exchanged documentation. All representations and claims within the Vendor's Proposal shall constitute warranties of the stated responses and claims. Upon written acceptance of the Vendor's proposal or any part thereof, by JCU, the Vendor shall negotiate for entering into an Agreement establishing mutually acceptable terms and conditions for the delivery of the project and services.

In the event of default or failure to arrive at mutually acceptable terms and conditions, JCU may accept another Vendor's proposal, seek new proposals, or carry out the work in any way deemed appropriate.