

Request for Proposal

I. Oikocredit USA Overview

Oikocredit USA is the US arm of Oikocredit International, a global cooperative social investment vehicle that provides credit and technical assistance to over 860 local economic development organizations in 67 countries around the world. About 80% of the portfolio invested funds microfinance institutions; the other 20% is made up of trade and agricultural cooperatives, fair trade organizations and small-to-medium enterprises (SMEs). Oikocredit provides funding only to the developing world – about 70 countries in the global south and Eastern Europe and Central Asia. We have about \$640 million deployed in outstanding loans, all of which is funded through social investments from 45,000 individual and institutional investors around the world. Oikocredit was founded in 1975 by the World Council of Churches (WCC) as a cooperative institution managed by denominational representatives of the WCC. Today, we are no longer officially associated with the WCC though many of our members and investors are churches or church councils from the WCC denominations. Our cooperative structure is made up of about 600 member organizations, each with one vote in the cooperative regardless of investment size. These members meet annually to vote on dividends, propose resolutions and discuss overall organizational strategy.

Oikocredit USA is charged with attracting new investments and managing relationships with our existing investor base; we do not disburse loans. Over \$30 million comes from about 6,000 investors in the USA. Most of our investors are individuals; most of our institutional investors are churches. Our investors are primarily motivated by the social return on their investment in addition to a 2% annual financial return.

II. Situational Analysis

Headquartered in Washington, DC, Oikocredit USA is made up of a staff of three full-time employees – a National Director who represents Oikocredit USA throughout the country and oversees US operations as the liaison between Oikocredit International and the US-based team; a Business Development Coordinator who coordinates office operations and outreach activities from DC; and a San Francisco-based sales representative dedicated to business development in the greater California market. This small staff relies on the work of at least 4 volunteer or contract-based interns in the DC office, in addition to two volunteer “Support Associations,” organized by Oikocredit International, based in Seattle and Pittsburgh.

Under the leadership of our new National Director (hired in June 2011, replacing an 11-year Executive Director), Oikocredit USA is currently engaged in a “rebranding” of sorts to enhance our brand and recognition within the social investment space. We seek a firm that will assist Oikocredit USA in presenting our complex and unique structure as an appealing and approachable story and lasting brand. While we are not a faith-based organization, our history is tied to organizations of faith which continue to be important members of our investor base. Oikocredit USA should be able to leverage these investor and member relationships to create a national group of “ambassadors.”

Recognizing that our investor base is largely 50 years and older, in 2012 we made a significant push to engage young investors (18 – 30 years old). We piloted a nation-wide student-based social media program “CHiRP”

(Citizens Helping in Reducing Poverty), launched a December 2012 youth investment campaign, and are working to engage more on college campuses across the nation. Despite this, 18 – 30 year old investors made up only about 7.5% of our new individual investors in 2012.

We are increasingly focused on engaging with financial advisors focused on socially responsible investing (SRI). We have found this to be a successful strategy and wish to expand our brand within this audience.

We are also engaged in a revamp of our current client relations strategy to leverage current investors as “ambassadors” for Oikocredit USA. We believe that this is a good strategy given that current investors add to their investments with greater frequency and require less effort than attracting funds from new investors. In 2012, we increased our communication with investors through a new e-newsletter, regular blog series, and frequent webinars, in addition to improving investment administration, which was a source of frequent complaints in past years. In September 2013, we will hold our very first investor conference to bring together current investors from around the country. We seek assistance from a firm to brand this investor conference and engage with our current investor audience.

Oikocredit USA faces certain challenges, including the misconceptions that we are a faith-based organization, that we invest directly in individuals, that we are a microfinance institution or solely an investor in microfinance, or that we are a charity in need of one-time donations. We also have a reputation among some investors of inconvenient investment administration (no online account access) and imperfect customer service. Overall challenges include Oikocredit’s relative unknown name in the US social investment space, and our small staff that is stretched to capacity.

III. Scope of Work

Oikocredit USA seeks a firm to engage in the following projects:

Phase I: 2013

Assist with media and advertising surrounding our 2013 Investor Conference, including print and online ads, media outreach, and video recording during the event.

Phase II: 2014

- Media training for Oikocredit USA staff & team members
- Improve print and online advertising campaigns to present stronger and clearer messaging
- Stories pitched to media outlets
- Improve messaging to two of our key target markets – youth and faith-based investors

IV. Request for Proposal

Your proposal should include the following information:

Agency Overview

- Provide a brief overview of your agency history and philosophy.
- Provide a list of agency capabilities & expertise
- Please indicate how your firm differentiates itself from competitors as far as branding & messaging and media outreach.

Client-related Questions

Please provide a current client list, and indicate whether you have any clients that might pose a conflict to managing our account. If applicable, please describe clients with whom you've had long-term relationships and why those relationships have been successful.

Account Team-Related Questions

Describe your team structure and how resources would be allocated to Oikocredit USA. Provide brief bios for the team and client references where applicable. Please indicate who is responsible for managing timelines and budgets.

Industry Experience-Related Questions

Please indicate your understanding of our market and describe your experience and capabilities within the field. Include any media or online influencer relationships you have within our market.

Program-Related Questions

Provide a proposed timeline for media and advertising outreach related to the investor conference. If possible, provide an example of a specific activity or campaign you would develop for Oikocredit USA.

Budget Related Question

Please provide an estimated budget for your services for Phases I and II. Please describe how you bill for services, and indicate whether you have non-profit rates available.

Please limit your proposal to no more than 10 pages. A sample campaign will not be counted in the 10 page limit. Send responses to:

Subject: Oikocredit USA PR Agency Search
Oikocredit USA
PO Box 66383
Washington, DC 20035
lgage@oikocredit.org

Deadline: February 5, 2013

Interviews & Online Presentations: February 11 – 15, 2013

Engagement Start anticipated: February 25, 2013