Request for Proposals

LISC

Local Initiatives Support Corporation
CDFI Compliance Portal in Salesforce

Statement of Purpose:
Local Initiatives Support Corporation (LISC) is requesting proposals from qualified vendors to develop a compliance data tracking template using Salesforce.

Background Information:
The Local Initiatives Support Corporation (LISC) is dedicated to helping community residents transform distressed neighborhoods into healthy and sustainable communities of choice and opportunity - good places to work, do business and raise children. LISC mobilizes corporate, government and philanthropic support to provide local community development organizations with:

- Loans, grants and equity investments
- Local, statewide and national policy support
- Technical and management assistance

LISC is a national organization with a community focus. Our program staff is based in every city and many of the rural areas where LISC-supported community development takes shape. In collaboration with local community development groups, LISC staff help identify priorities and challenges, delivering the most appropriate support to meet local needs.

Lending:
Lending is an essential instrument in LISC's community development toolkit. As one of the largest community development financial institutions (CDFI) in the nation, we work in partnership with local grassroots groups, for-profit developers and government agencies to finance programs and projects that will have a positive, long-term impact. LISC offers a wide range of loans, from pre-development to permanent financing, and we finance a wide variety of projects, from large affordable housing to small business loans.

Our Approach to Lending:
- We bring national and local investment resources to our network of offices whose staff know their communities well.
- We are able to provide flexible loan capital in underserved places.
- We have the expertise in specialized underwriting for such complex projects as schools, health care centers and affordable housing.

Current Environment & Client Management Software System:
Currently, LISC partners with 12 CDFIs who provide lending opportunities to community based small business and compliance information is collected using Excel by each of the CDFIs. In efforts to improve data quality and create a central repository for information LISC would like to deploy a compliance tracking template on Salesforce.

Data Elements Needed:
LISC will need to support compliance checks for CDFIs and would like to develop a solution with the following key features: 1) minimize manual processes associated with collecting data, 2) provide reminders to ensure actions are completed by borrowers and CDFI staff, 3) eliminate the need for Excel spreadsheet data entry, and 4) increase frequency and quality of data collection. Examples of key data elements include, but not limited to:

Program Area	Data Type	Data Elements
Basic Info	Borrower information	Name, email address…
	Demographics	Race/ethnicity, gender…
Pre-Closing	Business Needs Assessments	Date, status, details…
	Relationship/Trust Assessment	Date, status, details…
	Predatory Behavior Assessment	Date, status, details…
	Technical Assistance	Date, type, details…
Post-Closing	Underwriting	Date, revenue, industry, city, credit score…
	Loan Level Detail	Date, breakdown of credit opportunity/size, type…
	Communication Opportunity	Date, narrative…
Asset Management	Impact – Borrower	Credit score, status, revenue…

System Functionality Requirements:
The Salesforce configuration must meet the minimum software functionalities.

Enterprise Management
➢ Allow for user and group access privileges
Data Entry
➢ Option to collect data collection from a third party via a form
➢ Option to collect e-signatures
➢ Reduce duplicative data entry by providing tools to pre-identify duplicates and easily merge or delete duplicates.
➢ Provide useful workflow and automation
➢ Track demographics and program information
➢ Track changes to data over time
Quality Assurance
➢ Provide tools for improving data quality including user notifications, reports on quality and means for safeguarding against incorrect entries.
➢ Provide technical support to end users within a reasonable time frame (no more than 2-3 BD).

Reporting
➢ Provide customizable reports to various stakeholders.
Data Security
➢ Ensure secure connectivity, data transfer and password protection

Instructions for Vendors

Vendor Qualifications:
All vendors responding to this RFP must meet the Vendor Qualifications for submitting a RFP.

Eligible Vendors:
- Any governmental, not-for-profit, local agency, educational institution, for-profit entity, or joint venture properly operating in accordance with Federal, State and local law, and in business for at least 5 years, may submit a proposal for consideration.
- LISC is committed to working with Small Business Enterprises (SBEs), Minority-Owned Business Enterprises (MBEs), and Women-Owned Business Enterprises (WBEs). LISC encourages submissions from SBEs, MBEs, and WBEs to submit an RFP for consideration.

Proposal Format:
A complete proposal will consist of the following:

i. Contact Information - Provide a contact name for this RFP response, including title, address, phone number, and email address.
ii. Company Profile - Please provide a brief company history including:
   a. Location of your head quarters
   b. Years in business providing Client Management Software System
   c. Provide a brief explanation of what differentiates you from your main competitors.
iii. System Functionalities - Provide detailed responses to each of the listed "Required System Functionalities" on page 2. Describe how your Client Management Software addresses each of them.
iv. Implementation - Respond to how you may implement a new platform within a 3 month timeframe. Provide a draft timeline, with milestones to be completed using a start date of June 15, 2020.
v. Costs - Provide a low to high end estimate of costs, which includes platform set-up/ design, implementation, on-going technical support, and license purchase.
vi. Staffing - Describe the staff involved in the management of this account. Include names, titles, email addresses, and brief biographies of the following individuals or their organizational equivalents who will be assigned to manage this account(s):
   a. Chief account executive and or Regional executive
   b. Account representative, if different from above
vii. Subcontractors - Identify any subcontractors who will be used on the project, stating the specific service they will provide and their qualifications.
viii. References - Provide the name, address, email address and telephone number of the primary contact at three entities or corporations that are current clients of your company.

Proposal Evaluation Criteria - Basis for Award:
The following criteria will be used to evaluate the RFP's.

1. System Functionality Requirements
2. Data Elements
3. Vendor Support
4. Cost
5. Vendor Client Reference
6. End-User Experience (ease of use)
7. Implementation
8. Vendor Presentation

Evaluation and Award Process
The proposals will be reviewed initially to determine if mandatory requirements are met. Failure to meet mandatory requirements will result in rejection of the proposal. In the event that all vendors do not meet one or more of the mandatory requirements, the LISC reserves the right to continue the evaluation of the proposal.

General Submission Instructions
- Each proposal shall be prepared simply and economically, providing a straightforward and concise description of the vendor's ability to meet the requirements of this RFP. Emphasis shall be on completeness, clarity of content and responsiveness to the requirements.
- Proposals must be valid for a minimum of 180 days from the submittal deadline date to allow time for evaluation, selection, and any unforeseen delays.
- Questions about this RFP should be submitted by email and directed to: Carolina Rendon crendon@lisc.org .

Request for Proposals Schedule

RFP Distribution	May 15, 2020
Question submission from Bidders	May 22, 2020
RFP Submission Due Date	May 29, 2020
Vendor Demonstration/Presentation	June 1 thru June 10, 2020
Selection of Vendor/ Contract Negotiation	June 12, 2020