LiftFund Request for Qualifications: Customer Friendly, Mobile Optimized Online (Web-Based) Application

LiftFund will be undertaking the updating of its web-based online application and is seeking responses through this Request for Qualifications (RFQ) from experienced consultants to assist the non-profit with this project. LiftFund is located in San Antonio, Texas. It is a non-profit mission based community business lender and serves thirteen states and the communities in them. LiftFund was founded in 1994 and has provided over $200 million in small business capital to over 16,000 companies. LiftFund has approximately 100 employees with an annual operating budget of approximately $15 million. The Online Application is a critical component of LiftFund’s business model and in today’s competitive lending environment, LiftFund seeks to enhance its online application to cultivate, retain, and provide capital to entrepreneurs who are underbanked.

LiftFund’s leadership is seeking a firm that will assist the team in assessing the online application from the lens of the applicant and the lens of LiftFund from a data and packaging standpoint. The online application is a critical component of the application, but just as important is the digital follow up if an application is not completed. Along with these two elements, an applicant portal recommendation is also being sought. LiftFund is seeking a firm that has experience in web application design and is familiar with connectivity and use of CRM Microsoft Dynamics CRM.

The Scope of Work

LiftFund is seeking a qualification statement from experienced technology consultants to update LiftFund’s web based online application. The consultant will be required to assist LiftFund with an assessment of the existing environment and the development of an updated design to maximize the customer’s online application experience. The scope of work provided under a contract awarded as a result of this RFQ will include, at a minimum, the following:

1. Review of LiftFund’s existing application program and processes
2. Conduct feedback sessions from
   a. Customers
   b. LiftFund lending staff
   c. LiftFund underwriting staff
3. Design and develop a web based application in English and Spanish for LiftFund
4. Design and develop the web based program that integrated with Microsoft Dynamics CRM 2011 and/or 2015
5. Design and develop a mobile optimization of the web based application in English and Spanish
6. Design and develop a cultivation portal for the loan applicant and lender to access a common digital space to continue packaging
7. Design, develop and support LiftFund’s remainder and engagement process of loan applications pending
Statement of Qualifications

Statement of qualifications should include:

1. Briefly identify your organizational structure and support resources available to complete the scope of work detailed previously in the RFQ, including similar projects and experience in technology assessments and planning.

2. List the qualifications of key personnel who would be assigned to this project including related experience, education, certifications and professional affiliations.

3. Provide a minimum of two references including names of organizations and phone numbers for recently completed projects of a similar scope.

4. Briefly describe a work plan to develop and lead a technology assessment process and plan for LiftFund with estimated cost for your work.

5. Coding that adheres to the use of Microsoft Dynamics CRM.

Interviews

Respondents may be required to participate in a meeting with the selection committee to review their response to this solicitation and to assist in the further definition of the scope of work to be completed as a result of this request.

Following the definition of the scope of work, a final selection of the most qualified applicant will be determined and successful negotiations would result in the recommendation of a contract award. LiftFund reserves the right to accept or reject any or all proposals and to waive informalities and irregularities in proposals or qualification procedures, and to accept any proposal determined by LiftFund to be in the best interests of the District.

Submission Requirements

Please submit a response via email with RE as Response to Online Application Project to: Celina Pena, Chief Program Officer, to ITproject@liftfund.com.