

REQUEST FOR PROPOSAL
LiftFund

Invitation

LiftFund is seeking a firm to complete the project known as Entrepreneur Tracker, from the Aspen Institute.

Interested and qualified institutions are invited to submit proposals, which will be accepted until September 31. Proposals should be addressed to:

Julia Ward
LiftFund
2007 West Martin Street, San Antonio, TX 78207
jdward@liftfund.com

We would prefer electronic proposals sent via email in PDF format, but bound physical copies sent to our headquarters are acceptable as well.

RFP Schedule

Activity	Date
RFP Distribution	9-15-2016
RFP Responses Due	9-31-2016
Proposal Review	10-3-2016
Conduct Interviews with Selected Finalists	10-5-2016
Selection of Interviewers	10-9-2016
Start Date	10-12-2016

Background of LiftFund

LIFTFUND is a non-profit micro enterprise development program based in San Antonio with operations in Texas (Austin, Brownsville, Corpus Christi, Dallas/Fort Worth, El Paso, Houston, Laredo, McAllen), Louisiana (Alexandria, Baton Rouge, New Orleans, Shreveport) and the DELTA Region. Liftfund is dedicated to increasing incomes and creating jobs in low-income communities by providing micro-entrepreneurs with access to credit and business support services not available from the commercial banking sector. We offer a “hand-up” to those striving to support themselves and their families through small business initiatives. Through our loans and services, we help micro-

entrepreneurs strengthen their businesses, stabilize and increase their incomes, create additional employment and contribute to the economic revitalization of their communities.

Scope of Services

LiftFund is looking for a firm that can provide professional and effective interviews to a sample our clients, as part of the Entrepreneur Tracker project. The project is expected to last from mid-August to mid-November. Responsibilities include:

- Listening to and applying training materials
- Attempting to reach all clients in the sample at least three times
- Analyzing the best ways to get responses from our clients (ie. being attentive to what works and what does not)
- Entering survey data in the mT excel tool provided by the Aspen Institute

Submittal Requirements

Please submit a Cover Letter of Interest signed by a duly authorized officer or representative of the prospective firm, not to exceed two pages in length.

The Letter of Interest must also include the following information:

- The principal place of business and the contact person, title, telephone/fax numbers and email address of the responding institution.
- Description of responding institution (i.e. Corporation, Limited Liability Company, Joint Venture, Institute of higher learning, etc).
- A brief summary of the background and qualifications of the prospective firm.
- The number of hours per week the prospective firm could dedicate to this project
- If the applicant would require workspace at our headquarters, or if your institution would provide them with a workspace
- Description of how you would prefer to be compensated for your services
- Description of our right to terminate a contract with you. Is there a minimum contract period?

- Describe any additional services offered by your company that may be of interest to LiftFund

The Certification attached at the end of this RFP must be signed by the authorized representative of the respondent(s) and attached to the Letter of Interest.

Selection Process

The Selection Committee comprised of LiftFund staff will review qualifications in accordance with the evaluation criteria described in the Letter of Interest. Proposals that are submitted in a timely manner and comply with the mandatory requirements of the RFP will be evaluated in accordance with the terms of the RFP. Any contract resulting from this RFP will not necessarily be awarded to the vendor with the lowest price. Instead, contract shall be awarded to vendor whose proposal received the most points in accordance with criteria set forth in RFP.

Questions

Questions regarding this RFP should be submitted in writing via email to jdward@liftfund.com.

Submittal Due Date

Responses to this RFP are due by 5:00 PM on August 31, 2016. Responses to this RFP must be e-mailed to: Julia Ward, jdward@liftfund.com.

Certification Form Note

THIS PAGE MUST BE COMPLETED AND INCLUDED WITH THE SUBMITTAL CERTIFICATION.

The undersigned certifies, on behalf of the respondent(s), that the information provided in this RFP submittal to LiftFund is accurate and complete. I certify that the respondent(s) have reviewed this RFP in its entirety and accept its terms and conditions.

(Name of respondent)

(Signature of Authorized Representative)

(Typed Name of Authorized Representative)

(Title)

(Date)