

Request for Proposal

RFP: Final Impressions Project	Proposal Due By: 12-10-2022	Colorado Enterprise Fund
<p>Project Overview: Colorado Enterprise Fund (CEF) is an award-winning nonprofit community development financing institution founded in 1976. We spur entrepreneurship and economic vitality in Colorado communities by providing loans and business navigation services. We make loans from \$1,000 to \$1,000,000 to small businesses that do not qualify for traditional financing, helping them participate in the economic mainstream and fulfill their dreams of business ownership. We offer to all borrowers extensive strategy, marketing, accounting, and legal support through our Business Navigators team of experts.</p> <p>The individual awarded this project will innovate and head our Final Impressions Project. CEF places great attention on a positive first impression for each customer. We wish to create a similarly positive, supportive experience for people paying off their loan, including preparing them possibly for additional financing through CEF partners. At the same time, we seek to gather important impact data from each departing borrower.</p> <p>The successful contractor will have a proven track record of customer service or other custom-facing activities. Experience in planning or following organizational procedures is also required. Respondents with Spanish language skills and cultural understanding will be more highly considered. A track record of working in banking or finance will be a plus, along with experience with non-profits serving small businesses owned by Black Americans and people of color (BIPOC) and women. Another plus is working with the SBA in any capacity or being recognized by the SBA for service.</p> <p>This is a 1099 contractor role.</p>		
<p>Project Goals:</p> <ul style="list-style-type: none"> ● Improve the esteem of CEF in the eyes of departing customers, increasing the chances they refer us to others in need. ● Help customers plan final steps with their loan, anticipating CEF’s requirements for loan close out. ● Assist customers in understanding the coming release of liens on their property, if any. ● Interview customers on their experience with CEF and gather data on the progress of their business, including employee and contractor counts (FTEs), collection of files like tax filings, Profit & Loss Statements, and Balance Sheets. ● Capture and upload the above items in our CRM (Zoho). ● Interpret key factors from the above items and input factors in the Impact module of Zoho. ● Create or assist in the creation of impact reporting in Zoho. ● Complete additional duties as determined by Manger, Business Navigators. 		
<p>Scope of Work:</p>		

1. Six months before end of each loan, set expectations of customers--by text, email, or telephone--for steps to close out their loan.
2. Pursue first contact according to standards in place by Business Navigators.
3. Determine “unresponsive” status according to standards in place by Business Navigators. After a reasonable period, pursue first contact again.
4. Via telephone, use a questionnaire and Impact module on Zoho to collect impact data assisting CEF in marketing, grant writing, and continual improvement goals.
5. Using Zoho information, introduce customers to the lending institution that referred them to CEF, if known, or connect them to an array of partners.
6. Provide customers with links to marketing materials they may share with their contacts.
7. Impart small incentives for customers completing engagement with this process.
8. Perform time tracking and other standard internal procedures performed by CEF contractors.
9. Participate in Business Navigators team meetings.
10. Perform additional tasks pertaining to this scope of work as they are envisioned.
11. Assist the Manager, Business Navigators, in improving these envisioned procedures.
12. Assist others in CEF with organizational learning to be spurred by this envisioned role.

Note: This project presupposes a continuing need with ongoing work. It has no established end date, though an end may be imposed by CEF at any time due to funding availability and state and federal regulations. We will formally review performance after 3 months, then at 12 months recurring, to determine continuance.

Current Roadblocks and Barriers to Success

- Natural tendency of busy business owners to put off communicating with organizations not addressing their more pressing needs.

Evaluation Metrics and Criteria

- Productivity towards each of the above goals and items in the statement of work. Measures are to be determined.
- Completion rate of the Final Impression process across eligible customers.
- Innovation in the project above original conception, to better meet these goals and items in the statement of work.

Submission Requirements

1. Submit a document addressing your plan for accomplishing the Statement of Work.
2. Submit a cover letter and resume.
3. Submit additional documents or links describing past work products relevant to this RFP.
4. State your proposed hourly rate for this 1099 contractor role. Note that we seek the best value for investing in the chosen candidate’s experience and capabilities.
5. State your proposed average hours per week.
6. Propose additional project costs you envision.

Project Due By: **As agreed in contract awarded.**

Budget: **As agreed in contract.**

Contact: **Robert Anderson**
Manager, Business Navigators

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