



National Development Council
1111 Superior Ave East, Suite 1114
Cleveland, OH 44114
www.ndconline.org

Request for Qualifications
RLF Community of Practice Subaward
(Project Number: ED22HDQ3070190)
CFDA: 11.307 Economic Adjustment Assistance

Intent

The National Development Council (NDC) is requesting proposals from qualified organizations to partner with NDC as a subaward recipient to deliver the Community of Practice Program.

Key Dates:

Solicitation Issuance Date:	Tuesday, January 24, 2023
Written Questions Deadline Date:	Tuesday, January 31, 2023
Proposal Submission Deadline:	Tuesday, February 7, 2023, no later than 2 pm (PT)
Questions should be sent to:	Antonia (Toni) Stinnett astinnett@ndconline.org

Background

NDC is the nation's oldest and most innovative non-profit community development organization, a CDFI and training/technical assistance provider in the areas of affordable housing and economic development to nonprofit and public sector entities. NDC's mission is to direct capital to support the development and preservation of affordable housing, create jobs through small business lending, advance livable communities with social infrastructure investment, and build capacity with hands-on technical assistance to local governments. Throughout the pandemic, NDC has served as third party administrator and efficiently deployed over \$632 million in disaster recovery programs across the U.S. NDC has been an innovator in designing and developing programs, a builder of practitioner cohorts across widely scattered geographies, a national leader in providing capital to economically underserved communities, a collaborator providing development expertise, financial assistance, technical advisory services, and provider of best in class training as a part of a comprehensive community development service delivery model. In late 2022, NDC was awarded funding from the Economic Development Administration (EDA) to lead the creation of this Community of Practice.

In keeping with EDA's mission to prepare and support American regions for growth and success in the global economy, the National Development Council is proposing to establish a Community of Practice focused on growing and strengthening EDA-funded Revolving Loan Funds (RLFs). Over the next two years, NDC will facilitate a robust schedule of training and professional development programs designed to enable RLFs to better address the need for flexible, accessible, recovery and growth-oriented small business financing across the country. This Community of Practice will



build RLF organizational capacity, increase qualified high-impact deployment rates of RLF funding, and build an effective and long-term EDA RLF cohort.

Program Overview

NDC, in partnership with industry leading institutions including Drexel University's Nowak Metro Finance Lab, Community Reinvestment Fund have proven track record, even amid the Covid crisis, in building and maintaining cohesive cohort(s) of geographically disbursed members in pursuit of shared economic revitalization goals. This Team will work with EDA and its RLF organizations to increase high-quality impactful lending capacity and look at administrative and procedural efficiencies that limit EDA's impact and deployment goals for the industry. Working with EDA, its 600 +/- RLFs, and top-tier national partners, NDC will deliver a consistent schedule of training and networking programs designed to strengthen the connections between existing RLF network organizations, expand capacity of EDA's RLF lending entities, and grow the expertise and impact of the RLF industry.

Program activities will organize high performing RLFs as peer advisors involved with NDC and its partners to increase peer-to-peer learning opportunities and expand leadership within the RLF community, itself. NDC and CRF will implement self-assessment process that will help dictate a reduced financial underwriting and RLF management training module. This would be designed by NDC's training division to provide "best in class" approaches for lending staff.

An ongoing series of webinars and conferences will connect RLF executives with experts in capital development and regional lending consortia. While organized and led by NDC, content will be developed by partners such as Community Reinvestment Fund (CRF), Drexel University's Nowak Metro Finance Lab. Additional expertise would be procured per federal regulation and identified need from the participants. The RLF Community of Practice will also create opportunities for RLF leaders to teach one another. NDC will invite RLFs that have been successful in meeting the recovery needs for low-income and underserved populations to highlight the equitable lending practices that increased economic resilience in their communities. Similarly, we will create an opportunity for high-performing RLFs to share their experience growing EDA funds and capacity so that valuable strategic planning ideas can be extended to smaller struggling RLFs.

By creating and growing a dedicated Community of Practice, NDC will strengthen the RLF industry and elevate, in a national conversation, the vital role RLFs play in supporting local and regional economic growth.



Predicted Outcome: This Community of Practice will build RLF organizational capacity, increase qualified high-impact deployment rates of RLF funding, and build an effective and long-term EDA RLF cohort.

Strategic Approach: To meet existing needs throughout the industry, NDC would fully design the *Community of Practice* programming after conducting research and outreach beginning with EDA RLF staff, data, and targeted interviews with RLF staff representing the diverse regions and lending environments.

Core Activities include:

1. Communications
2. National RLF Network
3. Self-Assessment
4. The Community of Practice

Primary Components:

- Strengthening the business credit analysis, lending skills, and capacity of RLF staff
- Sharing strategies for increasing efficiency in program delivery
- Creating opportunities for involvement in national conversations around impactful small business and economic revitalization
- Increasing the flow of RLF capital to needed business sectors

Benchmarks for Success:

- RLFs would see an increase in applications and number of loans closed.
- Improvement in loans being current and a reduction in delinquent or defaulted loans.
- Quicker loan application, underwriting, loan decision process.
- RLFs increase leverage of EDA funding via loan disbursements as well as increased funding from non-EDA resources which are connected via this Community of Practice.
- Better functioning RLF entities based on greater involvement with peers, a regional and national lending community supporting their efforts (to be confirmed via survey).
- RLFs develop other lending products to respond to local economic growth needs.



Scope of Services

NDC is seeking proposals from qualified organizations to partner with NDC to deliver the Community of Practice Program, as outlined below:

- Develop and deliver a consistent schedule of **training and networking programs** designed to strengthen the connections between existing RLF network organizations, expand capacity of EDA’s RLF lending entities, and grow the expertise and impact of the RLF industry.
 - NDC will create a new certificate training series in high quality EDA-eligible business lending.
- Implement **self-assessment process** that will help dictate a reduced financial underwriting and RLF management training module.
- Organize and lead an **ongoing series of webinars and conferences**.
 - In addition to trainings and webinars, we will host “face to face” meetings and interactive learning programs to deliver information, collect feedback and questions and ensure that content is relevant.
 - The webinars and conferences will also include opportunities for RLF lenders to teach one another. NDC will invite RLFs that have been successful in meeting the recovery needs for low-income and underserved populations to highlight the equitable lending practices that increased economic resilience in their communities. Similarly, NDC will create an opportunity for high-performing RLFs to share their experience growing EDA funds and capacity so that valuable strategic planning ideas can be extended to smaller struggling RLFs.

This program is anticipated to deploy on March 1, 2023, and be completed on December 31, 2023.

Additionally, Specific Award Conditions from the Economic Development Administration for the Community of Practice Program are provided in Attachment I.

Qualifications

NDC is seeking proposals from reputable community organizations with:

1. Experience in the development and implementation of similar technical assistance programs for small businesses.
2. A comprehensive understanding of the economic impacts of COVID-19 to small businesses.
3. The ability to assess small businesses to determine sustainability and future success, including stabilization needs, if any, and viable expansion goals.
4. Experience with developing and deploying training and networking programs.
5. An established local presence in respective community.



Proposal Requirements

Proposals should be no longer than ten double-spaced pages written in 12-point font, excluding bios, resumes and disclosures.

Proposals should include the following:

1. COVER PAGE with firm information to include:
 - a. Legal Name and DBA (if applicable)
 - b. Physical Address
 - c. Mailing Address
 - d. Phone Number
 - e. Website
 - f. Year Established
 - g. Employer Identification Number
 - h. Unique Entity Identifier
 - i. Mission Statement
 - j. Contract information for authorized contract signer
 - k. Proposal Contact Information
2. EXECUTIVE SUMMARY with a concise statement of the Respondent's understanding of the RFQ and how the organization is best suited to deploy the Community of Practice Program.
3. QUALIFICATIONS AND EXPERIENCE should include the following:
 - a. Describe background and related experience in demonstrating ability to provide required services to deploy the Community of Practice Program. Indicate if expansion is required to provide the proposed services.
 - b. List and describe at least one successfully completed similar project.
 - c. Provide Project Team chart with names and the qualifications and experience of staff who will be assigned to this project. Please attach bios and resumes of project team members as Exhibit A.
 - d. Provide three professional references who can attest to and have knowledge of your organization's work. For each reference, the Respondent should provide the entity name, contact person, title, telephone number, email address, and a brief description of your engagement with the reference.
 - e. If you anticipate engaging another vendor/organization to assist with any portion of the project, please explain their role in detail.

Conflict of Interest

Respondent shall disclose as Exhibit B any conflict of interest under this solicitation. A conflict of interest occurs when an individual's personal interests (family, friendships, financial, or social factors) compromise the impartiality of a procurement process and create an unfair competitive advantage.



Respondent represents that it:

1. Is not related to by blood or marriage any NDC Board Member or employee;
2. Has not provided a gift or payoff to an NDC Board Member or employee or their relative or business entity;
3. Has not retained any person to solicit or secure this contract upon an agreement or understanding for a commission, percentage, or brokerage or contingent fee;
4. Has not knowingly influenced an NDC Board Member or employee.

Failure to disclose a conflict of interest or for violation of these provisions, NDC shall have the right to terminate this solicitation and any future contract negotiations.

Submission Requirements

Respondent shall submit a complete proposal electronically (via email) in one Adobe PDF file. Proposals should be no longer than ten double-spaced pages written in 12-point font, excluding bios, resumes and disclosures. Proposals should include concise responses to the specifications outlined in "Proposal Requirements" and should be organized/bookmarked as outlined below:

1. Cover Page
2. Executive Summary
3. Qualifications and Experience
4. Exhibit A – Bios and Resumes
5. Exhibit B – Conflict of Interest Disclosure (if applicable)
6. Exhibit C – Suggested Budget

Proposals must be emailed to astinnett@ndconline.org by the proposal submission deadline at 2pm (PST) on Tuesday, February 7, 2023.

Proposal Contact

Antonia Stinnett, Asst. Director
E-mail: astinnett@ndconline.org

Insert values for all cost categories

Personnel - Cost as shown on the Staffing Plan	
Total Personnel Costs	\$0

Personnel and Staffing costs a Staffing Plan

Fringe - Associated fringe costs for the personnel listed in the staffing plan	
Total Fringe Costs	\$0

Travel -			
<u>Event</u>	<u>Travelers</u>	<u>Purpose</u>	<u>Cost</u>
Total Travel Costs			\$0

Equipment			
<u>Equipment</u>	<u>Amount</u>	<u>Purpose</u>	<u>Cost</u>
			\$0
Total Equipment Costs			\$0

Supplies - Supplies must be identified by item and must correlate to the purpose of the work. Misc. is not sufficient.			
<u>Supply</u>	<u>Amount</u>	<u>Purpose</u>	<u>Cost</u>
			\$0
Total Supply Costs			\$0

Contractual - Other Sub Contracts (Provide Detail)			
<u>Task</u>	<u>Basis for Selection</u>	<u>Details</u>	<u>Cost</u>
Total Contractual Costs			\$0

Other -			
<u>Other</u>	<u>Amount</u>	<u>Purpose</u>	<u>Cost</u>
Total Other Costs			\$0

POTENTIAL STAFFING PLAN

Staffing Plan - Budget					
<u>Name</u>	<u>Annual Rate</u>	<u>% of Annual Hours</u>	<u>Annual \$</u>	<u>Number of Years</u>	<u>Total Cost by Employee</u>
Total Personnel Costs					\$0
Total Fringe Costs (Please Provide the Basis for Fringe Calculations)					\$0

Staffing Plan - Explanation		
<u>Name</u>	<u>Title</u>	<u>Project Responsibilities</u>

Total Personnel Costs should be calculated to account for all personnel costs.

Further, Fringe Costs should be calculated and documented based on personnel projections - supporting documents and policies should be provided upon request.