



# Request for Proposals

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## Local Initiatives Support Corporation

### UX Analysis

#### **Statement of Purpose:**

Local Initiatives Support Corporation (LISC) is requesting proposals from qualified vendors to develop a UX Analysis for our Financial Opportunity Center® (FOC) program. The main objectives of this UX Analysis are to:

- Identify usability issues and pain points within the current user experience.
- Evaluate the effectiveness of our current design and user flow.
- Provide actionable recommendations for improving the overall user experience.

#### **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.

#### **Financial Opportunity Center®:**

LISC's Financial Opportunity Center® (FOC) program partners with community members from underinvested neighborhoods to build family-sustaining careers and achieve financial success.

Residents work side-by-side with FOC coaches to identify, make measurable progress towards and achieve their goals through connections to employment services, greater financial health, and household income supports. LISC supports trusted community-based organizations to adopt the FOC model and provides them with data-based insights, technical assistance, training and peer-learning groups.

The FOC model involves integrated delivery of three core services:

- **Employment Services:** Job readiness, employment training, and assistance looking for job are essential parts of what is offered at a Financial Opportunity Center® site. A job and opportunities for advancement are the platform that supports a family's financial well-being, and employment services are the initial reason many clients begin working with an FOC.

- **Financial Education and Coaching** helps clients do a better job in how they handle their money. The goal is for a family to examine their savings and spending habits to see if they can make positive changes that improve their credit scores and stabilize and grow their assets.
- **Income Supports Access** can be crucial for giving a worker the time and income necessary to fulfill training to reach a better paying position and career. Coaching helps clients work through the disjointed network of public benefits and helps individuals access all of the services and supports for which they are eligible.

**Current Environment & Client Management Software System:**

LISC created the Family Financial Tracking (FFT™), a tailored data client tracking template for the FOC program. Currently, LISC’s 130 partners use FFT™ within Salesforce’s Experience Cloud and it relies significantly on manual data entry.

**Scope of Work:**

The UX analysis should cover the following areas:

<b>User Research</b>	Conduct user interviews, surveys, and/or usability testing to gather qualitative and quantitative data on user behaviors and needs.
<b>Heuristic Evaluation</b>	Assess the current design against established usability principles.
<b>Competitive Analysis</b>	Compare our product with competitors to identify areas for improvement.
<b>UX Audit</b>	Analyze the current user journey, including navigation, content, and interactions, to identify any friction points.
<b>Recommendations Report</b>	Provide a detailed report with findings and actionable recommendations for design improvements.

**Timeline:**

Please provide an estimated timeline for the following phases:

- Project Kick-off
- Research and Data Collection
- Analysis and Reporting
- Final Presentation

**Deliverables:**

The final deliverables should include:

- A comprehensive UX analysis report detailing findings and insights.
- A prioritized list of actionable recommendations with supporting rationale.
- Visual aids such as wireframes, user journey maps, or flowcharts, if applicable.
- A presentation summarizing key findings and recommendations for program stakeholders.

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**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
  - c. Provide a brief explanation of what differentiates you from your main competitors.
- iii. Scope of Work - Provide detailed responses to each of the listed items on page 2. Describe how your UX analysis addresses each of them.
- iv. Implementation - Respond to how you may implement the UX analysis within a 6-month timeframe. Provide a draft timeline, with milestones to be completed using a start date of December 2, 2024.
- v. Costs - Provide a low to high end estimate of costs.
- 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. Experience and expertise in UX analysis and design.
2. Understanding of our industry and target users.
3. Clarity and feasibility of the proposed approach.
4. Cost and value for money.
5. Timeline and ability to meet deadlines.

**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, Senior Program Officer, [crendon@lisc.org](mailto:crendon@lisc.org).

**Request for Proposals Schedule**

RFP Distribution	October 4, 2024
Question submission from Bidders	October 28, 2024
RFP Submission Due Date	November 4, 2024
Vendor Demonstration/Presentation	November 11 thru November 22, 2024
Selection of Vendor/ Contract Negotiation	December 2, 2024