



January 2, 2018

Dear Stakeholder,

The Council of Development Finance Agencies (CDFA) is soliciting proposals from development finance experts to provide revolving loan fund finance training course advisor services in 2018 and 2019.

CDFA is a national association dedicated to the advancement of development finance concerns and interests. CDFA is comprised of the nation's leading and most knowledgeable members of the development finance community representing hundreds of public, private and non-profit development entities. Members are state, county and municipal development finance agencies and authorities that provide or otherwise support economic development financing programs as well as a variety of non-governmental and private organizations including bankers, underwriters, attorneys, financial advisors and other organizations interested in development finance.

CDFA serves the interests of its members through educational events, seminars, publications, consulting, and lobbying activities. The organization's revenues are generated from membership dues, sponsorships, event registrations, grants, and contracts.

Through a cooperative agreement with the U.S. Economic Development Administration, CDFA will conduct six revolving loan fund finance training courses between January 1, 2018 and December 31, 2019. These courses will be largely based on the already established curriculum for CDFA's Intro Revolving Loan Fund Finance Course. As such, CDFA will employ a contract course advisor to proctor, moderate and facilitate each course. CDFA desires the same course advisor for all six training courses. Three courses will be held in 2018 and three in 2019.

CDFA will pay the selected course advisor \$2,666.66 per individual revolving loan fund finance training course for a total of \$8,000 per year. CDFA will also pay for all travel related expenses for the training courses, including meals, lodging and transportation for the selected course advisor for each revolving loan fund finance training course. No other expenses will be reimbursed. The available rate and reimbursement is non-negotiable.

The selected course advisor will serve as the primary content expert for each course but will not be expected to instruct throughout. CDFA's staff will select and confirm numerous speakers for each course with the course advisor serving as the moderator and facilitator for each session. The course advisor will shepherd the course throughout the day and address content questions, session overviews and audience participation. CDFA staff will manage and operate the course logistics, planning, marketing and execution. Each training course will be two days (16 hours) in length.

The selected course advisor will:

- Provide training course advisor services inclusive of preparation, development, moderation and



evaluation for the revolving loan fund finance training courses

- Facilitate and moderate six, two-day, on-site training courses focused on revolving loan fund finance
- Advise on the development of the course agenda and potential content for the revolving loan fund finance training courses
- Advise on potential speakers for the revolving loan fund finance training courses
- Coordinate talking points and presentation materials with speakers for the revolving loan fund finance training courses
- Attend all necessary pre-course meetings with speakers and staff for the revolving loan fund finance training courses
- Develop presentations and other related materials for the revolving loan fund finance training courses

All of these activities will be completed in coordination with CDFA staff. CDFA staff will be responsible for the following:

- Organize all logistics for the revolving loan fund finance training courses
- Conduct all marketing and outreach to participants for the revolving loan fund finance training courses
- Maintain all software, contacts and necessary technology to host revolving loan fund finance training courses
- Identify, contact and confirm all speakers for the revolving loan fund finance training courses
- Coordinate all conference calls, pre-course meetings, etc. for the course advisor and speakers to ensure quality revolving loan fund finance training courses delivery
- Collect presentations, handouts, speaker bios and all other documents for the revolving loan fund finance training courses
- Produce all attendee materials for the revolving loan fund finance training courses
- Provide all follow-up communication to course participants and complete all follow-through for the revolving loan fund finance training courses
- Manage all day-to-day operations of the revolving loan fund finance training courses

CDFA is issuing the following request for proposals from qualified content experts to serve as course advisor. All proposals must include:

- A. Evidence of the individual's qualifications to provide the above services;
- B. Background and experience in revolving loan fund management;
- C. Evidence of experience teaching, facilitating and serving in a leadership capacity in an educational setting;
- D. Statement of the individual's understanding of work to be performed, including any prior course facilitation experience;
- E. Statement of willingness to travel for all six training courses.



Proposals must be received by January 8, 2018 at 5pm (Eastern). Proposals of no more than two pages should be sent electronically to:

Katie Kramer
Vice President
Council of Development Finance Agencies
kkramer@cdfa.net

CDFA reserves the right to reject any and all proposals submitted and to request additional information. Furthermore, CDFA will select the individual that it sees best for this opportunity at its sole discretion.

If you have any questions or would like further clarification of any aspect of this request for proposals, contact CDFA 614-705-1300.

Sincerely,

Toby Rittner, DFCP
President & CEO