

# Marketing & Website Proposal Request **Specifications**

REVISED JANUARY 28, 2019



## **Fresno CDFI dba Access Plus Capital is seeking an experienced marketing and branding firm to develop and implement a comprehensive marketing & communications plan.**

### Introduction

Access Plus Capital is a mission-based not-for-profit, U.S. Treasury certified small business lender and service provider. We provide small business loans and services with a focus on underserved markets. We operate in 14 counties from San Joaquin to Kern and in Monterey & San Benito. Between 2017 and 2018, we went through a process of rebranding from Fresno CDFI to **Access Plus Capital**. We also opened new offices in Bakersfield and Modesto. Given our geographic reach, web and digital exposure is critical to our success.

Access Plus Capital's goal is to provide capital and business coaching services to underserved areas primarily in low-income communities and to diverse entrepreneurs. Historically, 70% of our borrowers have been people of color, more than 60% are low-income borrowers or businesses located in low-income communities, and a number of the clients speak English as a second language. 50% of our current loan activity is outside of Fresno County. Therefore, the organization is looking for a firm that shares our values of diversity & inclusion and has experience providing and creating culturally relevant services and materials.

*Our Vision: An economically prosperous Central California powered by entrepreneurs.*

*Our Mission: To finance small businesses and create jobs in underserved communities.*

### Objectives

1. Create an overall marketing strategy to support our loan and operations growth including messaging, content, and communications.
2. Redesign the existing website: [www.accesspluscapital.com](http://www.accesspluscapital.com). The current website is built in WordPress. It has back-end access for staff/loan committee members and clients can upload documents through it. Areas of need:
  - a. Increased functionality – application form, impact data (financials, annual reports, etc.), tell the story of who we are (team, mission, why, success stories)
  - b. Improved search engine optimization
  - c. Ensure site is secure (online application will require social security numbers, clients submit sensitive information via upload link).
3. Develop a retainer scope of work that includes implementation of the devised marketing strategy/plan.

### Website Functionality Requirements (See the current website for details)

Existing functionality:

1. Newsletter Sign-up (needs improvement)
2. Password secure login for staff and loan committee to post/view applications\*
3. Calendar (needs improvement) and events\*
4. Event RSVP/Registration\*
5. Secure upload (needs security review)\*
6. Web form/survey creation
7. Accept loan payments

## Key Audiences

1. Loan Applicants: existing business owners and entrepreneurs/start-up business owners. Please note that our staff and clients are multi-lingual.
2. Existing clients: business owners who have a loan with us and need general information, training, or may want information to refer someone to us.
3. Referral partners including bankers, CPAs, community leaders, etc. who can guide entrepreneurs to resources as a service or to our website as a financial resource.
4. Funding and investment partners including banks, foundations, and government agencies accessing our impact data, read success stories, sign-up for our newsletters, and may want to connect with us on social media.
5. Loan committee members: site login for review and voting on loan applications.\*
6. Board members: access information on website to educate themselves and others on our products, services, impact, and view current and historical portfolio health.
7. Staff: upload loan applications and communicate with loan committee members via comments on application pages.\*

*\*Some of these functions are available in the current website and platform.*

## Websites we like:

<https://www.mainstreetlaunch.org/>  
<https://us.accion.org>  
<https://www.lifffund.com/>

## Peers and Competitors:

Valley Small Business Development Corporation: <http://www.vsbdc.com/>  
Opportunity Fund: <https://www.opportunityfund.org/>

## Online Small Business Lenders and brokers:

<https://www.lendingclub.com/business/>  
<https://www.ondeck.com/online-applications-small-business-loans/>

## Compensation

Negotiable. Please provide pricing for the listed services. Separate out cost for (a) Objective 1 & 2 (marketing strategy & website) and (b) Objective 3 (on-going retainer).

## Timeline

Maximum three month development and rollout (May 2019). Marketing retainer to start no later than early June 2019.

## Response Elements

- Method of developing the marketing strategy
- Scope of work & Timeframe
- Price for marketing plan/strategy, website redesign, and retainer services (separately listed).
- Relevant portfolio including examples of work targeting diverse, multilingual and/or low-income communities (portfolio links are sufficient).

*We are a subsidiary of Fresno EOC and follow its procurement policies. Small, local and diverse businesses are highly encouraged to submit a proposal and we endeavor to utilize them to the fullest extent practicable (2 CFR Part 200.321).*

## Response Deadline

Send your proposal to Tate Hill – [tate.hill@accesspluscapital.com](mailto:tate.hill@accesspluscapital.com) by **February 5, 2019 -- 5PM.**  
**Proposal Interviews- February 7, 2019. Email Tate Hill by February 4 to confirm your planned participation for the February 7th interviews.**