U.S. Economic Development Administration (EDA)
Revolving Loan Fund (RLF) Customer Service Technology Survey

EDA is seeking to enhance the agency's IT systems to streamline Revolving Loan Fund (RLF) reporting and communications. More specifically, EDA plans to improve the process for submitting the RLF Financial Report (Form ED-209) and better manage RLF Plan updates through an online platform using Salesforce. As development and testing progress, EDA will provide additional information, including training and technical assistance, to ease the implementation of the online reporting platform.

To facilitate this effort, EDA seeks to understand RLF recipient's current IT systems and the potential to automate data integration. During development we would very much appreciate RLF recipients' input on ways to improve the process for submitting the RLF Financial Report.

RLF Recipient (organization name): _____

1. Please select the option(s) that most closely aligns to your organization's preferences regarding the redesign of the RLF reporting process for Form ED-209 (PDF) and Portfolio Loan Lists (Excel file):

   ☐ The current RLF reporting process is efficient and works well for our team; we would prefer that the current financial reporting process remain in place. If so, please use the comment box below for this question to indicate your concerns with development of a new financial reporting process.

   ☐ RLF reporting could be improved if we could directly upload the RLF reports (i.e. Form ED-209 in PDF and PLL in Excel format) via a secure website.

   ☐ RLF reporting could be improved if we could directly enter, edit, and submit the RLF report information via a secure website.

   ☐ RLF reporting could be improved if we could directly transmit the required data to EDA via a secure system that is compatible with our existing data management system.

   ☐ Other (Explain)

   ```
   ```

2. What <u>loan management</u> software/system(s) does your organization use to manage and report on its RLF?

   ```
   ```

3. What <u>financial management</u> software/system(s) does your organization use?

   ```
   ```

4. How does your organization integrate <u>loan management</u> and <u>financial management</u> software/system(s)?

```




```

5. A. Does your <u>loan management</u> and <u>financial management</u> software/system(s) work well for your organization?
   ☐ Yes
   ☐ No
   B. Would you recommend your software/system(s) to other RLF Recipients?
   ☐ Yes
   ☐ No
   Please share comments to explain why or why not.

```




```

6. Does your organization plan to purchase or develop software applications or systems related to your RLF program management?
   ☐ Yes
   ☐ No
   If so, please share any comments about plans for new software or systems for program management, financial information, and/or reporting for the RLF (or other lending programs).

```




```

7. What is your organization's experience integrating your software/system(s) with other systems such as Salesforce or Intuit, or databases such as Oracle?
   ☐ No organizational experience.
   ☐ Uploaded common file types (for example, CSV, XLS, PDF, etc.) to a secure online site.
   ☐ Integrated with Representational State Transfer Application Programming Interface (REST APIs)
   ☐ Integrated with Simple Objects Access Protocol APIs (SOAP APIs)
   ☐ Other experience integrating financial systems. Please describe in the comment box below.
   Additional Comments: How does your organization integrate loan management and financial management software/systems?

```




```

8. If you have experience integrating your systems, would you be open to further discuss with EDA your experiences, skills, and abilities?

☐ Yes
☐ No

9. Please share any other thoughts or considerations that would be informative for EDA as the agency works to improve the process for submitting the RLF Financial Report (Form ED-209).