

# Request for Proposal

## Title

**Professional Association Management, Advocacy and Fiscal Services**

## Issued by

**Illinois Workforce Partnership**

## Issue Date

**December 22, 2025**

## Response Deadline

**January 12, 2026**

## Introduction

The Illinois Workforce Partnership (IWP) is a statewide, member-driven organization representing Illinois' twenty-two local workforce development boards and local workforce areas responsible for administering federally and state-funded workforce programs. IWP serves as a convenor, advocate, and resource for the local workforce boards and areas.

IWP is undergoing a critical transition from a peer-driven group of local workforce directors into a leadership association built on and guided through the newly adopted strategic plan. IWP's transition reflects the Board of Directors' commitment to establishing a forward-looking association that advances Illinois' workforce development system and elevates the role and impact of the twenty-two local workforce boards.

IWP seeks professional support to successfully transition to this next phase, strengthen its leadership capacity, enhance visibility, support directors, expand professional development, develop and engage in legislative advocacy, and support the association with operational and fiscal infrastructure.

## Objectives of the RFP

IWP is soliciting proposals from qualified firms or individuals to provide the following services for an initial six-month contract period, with the potential for renewal based on performance and available funding.

- Leadership transition support
- Executive leadership services
- Operational and fiscal agent services
- Legislative engagement and advocacy
- Statewide conference and professional development planning

## Contract Term

This agreement will be entered into between the firm/individual and the Illinois Workforce Partnership (IWP). The initial agreement shall be in effect upon execution for an initial six-month period. IWP reserves the right to renew this agreement for up to five additional one-

year periods, subject to Board approval, acceptable performance, and appropriation of sufficient funds.

## Scope of Work

### 1. Leadership Transition Planning

- Facilitate an organizational transition plan that supports IWP's shift into a leadership association.
- Work with a team of members to review and update IWP's bylaws, role and staffing descriptions, governance structures, and applicable policies.
- Provide best-practice guidance on governance and financial oversight models appropriate for a membership-based, grant-funded nonprofit association. Assist in formalizing financial governance policies.

### 2. Executive Leadership Services

- Serve as the association's lead administrative and coordination resource.
- Provide strategic guidance to IWP's Board of Directors as appropriate, and support implementation of the strategic plan.
- Coordinate initiatives, committees, and communications.

### 3. Conference & Professional Development Planning

- Lead a team of members with the planning, coordinating, and supporting a first-ever statewide IWP membership conference on an accelerated timeframe for October 2026.
- Develop an annual professional development agenda aligned with state and federal workforce priorities.
- Coordinate logistics, speakers, vendor engagement, and statewide training opportunities.

### 4. Visibility & Communication

- Prepare message frameworks, newsletters, updates, and public-facing materials.
- Establish a process to strengthen IWP's participation and presence with statewide and national partners, agencies, and membership.
- Support consistent messaging aligned with workforce system priorities and legislative engagement boundaries.

### 5. Advocacy & Legislative Engagement

- Monitor all workforce-related legislation introduced in the Illinois General Assembly.
- Provide a list of tracked bills and summaries of key policy and political developments in Springfield.
- Engage on priority legislation through meetings, testimony, and policy or legislative language development, as appropriate and permissible under 501(c)(3) regulations.
- Establish a presence with state and local elected officials as a trusted resource.

- Advocate for federal and state workforce programs and the role of local boards.
- Ensure compliance with 501(c)(3) lobbying regulations and evaluate governance structure.

## **6. Fiscal Agent Services**

- Provide day-to-day financial administration, including maintaining the general ledger and supporting documentation, subject to the fiduciary oversight and governance authority of the IWP Treasurer and Board of Directors.
- Develop and manage annual operating budgets in collaboration with the Treasurer and Board, including budget-to-actual tracking and variance analysis.
- Prepare and present regular financial reports (monthly, quarterly) for Treasurer and Board review, including financial statements and cash flow summaries.
- Ensure compliance with applicable federal, state, and nonprofit financial requirements, and maintain documentation to support grant reporting, audits, and monitoring.
- Coordinate preparation for annual audits, financial reviews, or agreed-upon procedures, and serve as the primary point of contact with external auditors.
- Support membership dues invoicing, receipt, tracking, and reconciliation.
- Implement and support basic internal control practices, including separation of duties, documentation standards, and financial review protocols, in coordination with the Treasurer and Board.

## **Deliverables – First Six Months**

The following deliverables are expected during the initial six-month contract period. Deliverables may be refined in collaboration with the Board based on funding and organizational readiness.

### **1. Leadership Transition and Executive Support**

- Leadership Transition Plan outlining governance, staffing, operational roles, and recommended next-phase executive leadership structure.
- Recommendations for bylaw, policy, and governance updates aligned with IWP's strategic plan.

### **2. Operational and Fiscal Support**

- Financial management transition plan outlining governance, support, including budgeting, invoicing, tracking, and reporting.
- Established and operationalized fiscal and administrative support systems.
- Recommendations for long-term operational and fiscal sustainability.

### **3. Advocacy and Legislative Engagement**

- A six-month advocacy and legislative engagement plan aligned with state budget and legislative calendars.

### **4. Conference and Professional Development Planning**

- Conference concept framework, including themes, session tracks, speakers, sponsorship opportunities, and revenue strategies for a statewide membership conference scheduled for October 2026.

## Deliverables – Annual Basis

### 1. Association Management

- Serve as the Executive Director or Association Management Lead, accountable to the Board of Directors.
- Implement and manage annual work plans aligned to the approved strategic plan.
- Support the Board of Directors and committees.

### 2. Association Fiscal and Accounting Services

- Serve as fiscal agent including budget development and financial reporting, membership dues collection and tracking, compliance with federal, state, and nonprofit requirements.
- Coordinate audits, filings, and required reports.
- Develop and maintain administrative systems, policies, and procedures.
- Provide quarterly and annual financial reports to the Board.

### 3. Membership Engagement and Services

- Manage membership enrollment, renewals, and communications.
- Provide resource sharing, peer learning space, resource sharing.
- Support onboarding and leadership activities.

### 4. Advocacy and Legislative Engagement

- Develop and implement an annual advocacy agenda on workforce priorities.
- Monitor legislative activities and analysis of workforce-related bills and budgets.
- Deliver legislative and policy updates including an annual outcome report.
- Coordinate meetings, briefings, and testimony with legislators, state agencies, and administrative officials.
- Serve as a trusted, nonpartisan resource to policymakers on workforce system design and performance.
- Ensure ongoing compliance with 501(c)(3) lobbying and advocacy restrictions.

### 5. Annual Conference Planning and Professional Development

- Plan, manage, and execute the annual statewide membership conference.
- Coordinate speakers, sponsors, vendors, and logistics.
- Develop a multi-year professional development calendar aligned with members.

### 6. Communication Support

- Maintain consistent external messaging aligned with workforce system priorities.
- Maintain and update digital presence, including website and social media.
- Produce regular member communications (newsletters, alerts, policy briefs).

### 7. Reporting and Accountability

- Monthly operational and advocacy activity reports.
- Quarterly financial dashboards.
- Annual report to the Board and membership.

## Qualifications

Respondents must demonstrate the following minimum qualifications. Proposals will be evaluated based on depth and relevance of experience.

### **1. Organizational and Professional Experience**

- Demonstrated experience supporting workforce development systems, nonprofit associations, government entities or public-private partnerships.
- Knowledge of federal and state workforce funding, including WIOA and related programs.
- Experience working with state agencies or policy focused organizations, preferably in Illinois.

### **2. Advocacy and Policy Expertise**

- Proven ability to monitor legislation, analyze policy impacts, and engage policymakers in a nonpartisan manner.
- Demonstrated understanding of 501(c)(3) advocacy and lobbying restrictions.
- Experience drafting policy briefs, testimony, or legislative language.

### **3. Fiscal and Administrative Capacity**

- Experience with nonprofit or federally funded financial management, compliance, and reporting.
- Demonstrated ability to serve in a fiscal agent or administrative support role.

### **4. Leadership and Organizational Development**

- Experience supporting organizational transitions, leadership development, or association growth.

### **5. Conference and Professional Development Experience**

- Experience planning or supporting statewide or regional conferences, professional development events, or learning convenings.

### **6. Professional Management Experience**

- Demonstrated workforce development and WIOA system experience.
- Demonstrated ability representing associations in various and diverse settings and audiences.
- Strong written and verbal communication skills.
- Demonstrated ability to work with a board-led membership organization.
- Capacity to deliver services within defined timelines and budgets.
- Experience working with or supporting board-governed, membership-based nonprofit organizations.

## Proposal Requirements

### 1. Evaluation Criteria

- Relevant qualification and experience
- Demonstrated understanding of the objectives and goals
- Soundness of methodology and work plan
- Demonstrated commitment to IWP's mission, strategic plan, and member-driven governance model
- Cost-effectiveness and value
- Flexibility and ability to work through the process with IWP

### 2. Procurement Rights and Conditions

The Illinois Workforce Partnership (IWP) reserves the right to accept or reject any or all proposals, in whole or in part; to waive minor irregularities or technical deficiencies; to request additional information or clarification from any respondent; to negotiate scope, deliverables, and cost with one or more respondents; and to cancel or reissue this RFP at any time if it is determined to be in the best interest of the Association.

IWP further reserves the right to award services to one or multiple respondents and to make awards based on organizational need, qualifications, available funding, and overall value, rather than lowest cost alone. Submission of a proposal does not obligate IWP to award a contract or to pay any costs incurred in the preparation of a proposal.

### 3. Timeline

- RFP Release: December 22, 2025
- Proposal Deadline: January 12, 2026
- Deadline for Questions: January 7, 2026
- Interviews with finalists if applicable: January 19<sup>th</sup> – 21<sup>st</sup>
- Selection and Award Notification: January 23, 2026
- Project Start: Late January – early February 2026
- Initial Contract Term: Six months through July 2026

### 4. Submission Instructions

Please submit proposals electronically to:

**Karen Allen**

**Executive Assistant**

**Illinois Workforce Partnership**

**[kallenworkforcealternatives@gmail.com](mailto:kallenworkforcealternatives@gmail.com)**

### 5. Questions

Questions regarding this RFP should be submitted by email to **Karen Allen, IWP Executive Assistant**, [kallenworkforcealternatives@gmail.com](mailto:kallenworkforcealternatives@gmail.com) by January 7, 2026. Questions will be compiled, and responses will be shared.

## **6. IWP Proposal Submission Template**

Respondents must provide a detailed narrative and breakout for each scope area they propose to support. Each area must include deliverables, timelines, hours, staffing, and a budget. Proposals may be awarded in whole or in part depending on funding availability. IWP reserves the right to accept or reject any or all proposals, to award services in whole or in part, to request clarification or additional information, and to waive minor irregularities in proposals received.

### **1. Organization Name**

### **2. Organization Overview**

- Including key staff and qualifications

### **3. Organization Experience**

- Including relevant experience

### **4. Proposal Narrative**

Provide a detailed narrative for each selected objective including the scope and methodology

- Leadership Transition Planning
- Association Management
  - i. Executive Leadership Services
  - ii. Board of Directors Services
- Association Fiscal and Accounting Services
- Advocacy and Legislative Engagement
- Conference Planning
- Professional Development Planning
- Marketing and Communications Services

### **5. Deliverables & Work Plan**

Work plan must include deliverables, timelines, and staff assigned for each selected objective.

### **6. Budget Breakdown**

- Detail cost proposal for each objective
- Include a detail budget for the initial six-months and proposed annual budget.

### **7. Experience & Qualifications**

- Related experience for each staff assigned to selected scope area including a copy of resumes
- Highlight Workforce development/WIOA experience
- If staffing is to be hired, provide job description and hiring process

### **8. References**

Contact information for at least professional references familiar with comparable work

## Evaluation Criteria

Proposals will be evaluated using a standardized scoring rubric. IWP may invite selected respondents to interview prior to final award.

### 1. Qualifications & Experience

- Experience with workforce systems, associations, or government entities
- Staff qualifications and capacity
- Quality of past performance and references

### 2. Technical Proposal & Work Plan

- Alignment with IWP strategic direction
- Quality of work plan and timelines
- Understanding of nonprofit operations

### 3. Advocacy and Legislative Engagement

- Experience with state legislators and committees
- Ability to prepare testimony, policy briefs
- Understanding of 501(c)(3) lobbying limits

### 4. Leadership Transition and Executive Leadership Support

- Experience with association transitions and leadership support
- Experience with governance and structural assessment
- Experience working with board of directors
- Quality of proposed transition plan
- Quality of proposed leadership support plan

### 5. Conference and Professional Development Training

- Experience conference and professional training development and delivery
- Sponsorship strategies clearly defined and achievable
- Well defined conference and training strategies and sustainability plans

### 6. Fiscal Agent and Operational Services

- Experience with nonprofit/federal fiscal requirements
- Budget, compliance, reporting capability
- Association management experience

### 7. Cost Proposal

- Reasonableness of cost
- Flexibility based on funding availability
- Staffing/hours/costs