



CHICAGO COOK
WORKFORCE PARTNERSHIP

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REQUEST FOR PROPOSALS
FOR
NON-PROFIT FISCAL AND GRANTS MANAGEMENT CONSULTANT

CHICAGO COOK WORKFORCE PARTNERSHIP
69 WEST WASHINGTON STREET, SUITE 2860
CHICAGO, IL 60602

Contact for this RFP:
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RELEASE DATE:
May 21, 2018

QUESTIONS DUE:
May 30, 2018

RESPONSES DUE:
June 8, 2018

Karin M. Norington-Reaves
Chief Executive Officer

Dr. Kenneth Ender, Co-Chair
George Wright, Co-Chair
Chicago Cook Workforce
Innovation Board

Purpose of the RFP

The Chicago Cook Workforce Partnership (The Partnership) is seeking proposals from experienced firms to provide outsourced non-profit specific finance and accounting services. A description of our organization, the services needed, and other pertinent information follows.

Description of Chicago Cook Workforce Partnership

The Chicago Cook Workforce Partnership is a non-profit administrative agency formed in July 2012 under the joint leadership of Chicago Mayor Rahm Emanuel and Cook County Board President Toni Preckwinkle. The Partnership has programmatic and administrative responsibility for all federal workforce development services provided through the Workforce Innovation and Opportunity Act (WIOA) in Local Workforce Innovation Area (LWIA 7), which serves the entirety of Cook County inclusive of the City of Chicago. The Chicago Cook Workforce Innovation Board, which oversees The Partnership, has statutory responsibility for the local implementation of WIOA and provides a forum for business, labor, education, government, community-based organizations and other stakeholders to work together to develop strategies that can address the supply and demand challenges confronting the local workforce. The WIB provides leadership, strategic planning, policy direction and oversight for WIOA services in LWIA 7.

The Partnership has implemented numerous policy changes to align occupational training services with current and projected business needs. Through its Business Relations and Economic Development team, The Partnership has amplified private sector awareness of the region's workforce resources and has led to deeper business engagement.

In addition to its federally-funded initiatives, The Partnership has leveraged its 501(c) (3) status and breadth of expertise to create a host of programs funded through philanthropic contributions from corporations, foundations and individuals. To date, The Partnership has received and managed more than \$50M in non-WIOA grants. Our rapid growth and anticipated grants make it necessary to seek additional accounting and grants management support.

For more information about The Partnership please visit our web site:

<http://workforceboard.org/>

SECTION II. EVALUATION SCOPE OF WORK AND DELIVERABLES

Scope of Services

The Partnership seeks an external accounting firm/independent contractor to provide comprehensive non-profit finance & accounting services pertaining to our non-WIOA grants and general fiscal operations. The anticipated contract start date for these services is no later than July 1, 2018.

A comprehensive list of required services can be found in **Exhibit A**. A more detailed look at the current financial/accounting staff and other pertinent information about The Partnership can be found in **Exhibit B**.

Deliverables

The independent consultant will perform standard grants management and non-profit accounting functions. All work must be documented in Quarterly Reports to be submitted to designated senior leadership including, but not limited to, the CEO, C-Suite team, and Board leadership. Specific report components will be agreed upon by the consultant and the senior leadership of The Partnership.

SECTION III. FUNDING AND PERFORMANCE PERIOD

The Partnership will award the contract to one entity that best demonstrates an ability to effectively deliver and manage the consultant services as described herein. All proposals must be comprehensive and address the full scope of services contemplated by this RFP. The awardee will be deemed an independent consultant for legal purposes.

The Partnership anticipates funding a contract effective July 1, 2018 through June 30, 2019 for an amount to be determined upon proposal review for reasonableness. Contract renewals are dependent upon The Partnership's financial position, contractor performance, among other considerations.

Evaluation Criteria

The successful contractor will demonstrate that it:

- Delivers significant, measurable value to The Partnership (measured in both savings and service levels). We encourage creative solutions that have the ability to achieve savings of 20% over existing cost; and
- Facilitates and educates The Partnership staff on best practices to help it not only reduce costs but also identify efficiencies and provide market intelligence (benchmarking, conferences, etc.) to make its operations more efficient and effective;
- Enables The Partnership to increase its effectiveness through process refinement and systems implementation including (i.e. LEAN, Six Sigma, RACI);
- Has the ability to interface with other Chicago Cook Workforce Partnership units and functions (i.e., Strategic Initiatives, Procurement, HR, IT, etc.);

SECTION IV. PROPOSAL REQUIREMENTS

Eligible Respondents

Respondents must have a track record of applying GAAP and other non-profit financial best practices and methods to multi-year grant funded programs. Respondents must have conducted (or be in the process of conducting) at least three (3) projects of a similar scope and revenue size in the past ten years.

Respondents must be eligible to do business with the City of Chicago and Cook County. Entities are ineligible if they: 1) are currently barred, suspended, proposed for debarment, declared ineligible or voluntarily excluded from participation in this transaction by a Federal or State department/agency; 2) have existing grants with any State or County agency that are suspended or otherwise not in good standing; or 3) are not in compliance with the Illinois Department of Revenue or the Federal Internal Revenue Service or OMB requirements.

Proposal Elements

The proposal must include the following elements:

1. **Narrative (maximum 20 pages with minimum 12 point font in Times New Roman)** - The narrative must provide specific and detailed information regarding:
 - a. The firm's experience in providing finance & accounting services to nonprofit organizations of comparable size and/or budget to The Chicago Cook Workforce Partnership.
 - b. Prior experience providing outsourcing services for similar size groups-whether non-profit or not.
 - c. Key personnel to be assigned to the account, including resumes.
 - d. References with contact information for clients of similar scale and scope.
 - e. How the firm will provide the services requested. The response must include a plan detailing the following:
 - Transition and establishment of services
 - Day-to-day interaction between The Partnership and your staff;
 - Technology platforms and systems used;
 - Measurement and reporting of services provided
 - f. Policies and procedures for securing gathered information, and protecting the confidentiality of individuals and The Partnership, including sub-grantees.
 - g. Any other services or efficiencies, beyond the scope of this RFP that your firm can provide that are consistent with the bases of this RFP.

2) Budget

Provide a detailed line item budget including personnel, travel, materials/supplies, etc. Provide a budget narrative that details roles of all personnel and justifies all other costs. Include the resumes of any staff working directly on the project.

Describe the firm's fee structure and be explicit as to pricing (FTE-based, transition based). Please be sure to detail pricing at the function/process level and address how/if pricing will change over time as efficiency improves.

3) Organizational Financial Statements

Provide year-end financial statements for your most recent fiscal year and your most recent audited financial statement, if applicable.

SECTION V. PROPOSAL REVIEW

A Selection Committee consisting of workforce development staff at The Partnership and, possibly, Chicago Cook Workforce Innovation Board or Board Committee members shall review all complete and timely proposals submitted. Highest scoring firms may be asked to make a formal in-person presentation. If so, the presentation will be scored by The Partnership selection committee which will make a recommendation to the CEO regarding final selection and appointment of a firm.

All complete proposals received by or before the deadline will be reviewed by and scored out of **45 points** according to the following criteria:

- **Technical (20 points):** The extent to which the applicant is qualified to carry out the scope of work and proposes a suitable and feasible plan for doing so, as described in the proposal narrative.
- **Budget (10 points):** The extent to which the proposed budget will realistically finance the scope of work in a cost effective manner, as outlined in the proposal budget and budget narrative.
- **Fiscal Capacity (10 points):** The extent to which the applicant has the fiscal capacity to manage the award, as evidenced by organizational or personal business financial statements.
- **MBE/WBE/DBE (5 points):** As an equal opportunity employer serving significant populations of underrepresented individuals, points are granted to companies properly certified as MBE/WBE/DBE.

SECTION VI. PROPOSAL SUBMISSION

Proposal Deadline

THE DUE DATE FOR SUBMISSION OF PROPOSALS, IN RESPONSE TO THIS REQUEST FOR PROPOSALS IS June 8 2018 at 4:30PM CENTRAL TIME. Proposals received after the due date and time may be deemed NON-RESPONSIVE and therefore subject to rejection.

Submittal Procedure

All proposals **must be submitted in BOTH ELECTRONIC AND PAPER form**, according to the following rules.

Paper versions must adhere to all of the following requirements:

- One original and two copies of the full proposal.
- One complete proposal containing original signatures in blue ink signed by the President, CEO or equivalent of the organization marked "Original."
- A maximum of 15 pages excluding any Appendices
- 8 1/2 x 11 letter size paper
- Single-sided printing

- Bound on the left side
- One inch margins
- Double-spaced
- Minimum 12-point font in Times New Roman.

In addition, proposals must be submitted on a USB flash drive or CD with all documents saved as adobe.pdf, Microsoft Word or Microsoft Excel files. In the electronic submittal, the Narrative should be provided separately from the Appendices and in Microsoft Word format. (Appendices may be combined in one electronic document.) Both the paper files and USB flash drive or CD must be submitted together. **The outside of each envelope or package should be labeled using the following guide:**

RFP for Nonprofit Fiscal And Grants Management Consultants

Date of Submission:

Name of Respondent:

Package ___ of ___

Delivered to:

Chicago Cook Workforce Partnership

69 West Washington Street, Suite 2860

Chicago, IL 60602

ATTN: Illona Sheffey-Rawlings, CAO/General Counsel

Complete proposals will be accepted prior to the due date from 9:00 a.m. to 4:30 p.m. Monday – Friday at the same location. **Late or incomplete proposals will not be reviewed.** In-person or bonded messenger delivery of proposals is encouraged.

Questions

Respondents are strongly encouraged to submit all questions and comments related to the RFP via e-mail to **financerfp@workforceboard.org**. The deadline for questions is **May 30, 2018 at 4:30 pm Central Standard Time**. Thereafter, the written questions and answers will be posted on the website.

Schedule of Events

Release of RFP	May 21, 2018
Proposals Due to The Partnership	June 8, 2018
Announcement of Awards	June 24, 2018
Contract Period Begins	July 1, 2018

Notice of Award

All respondents will be notified by email as to their award status.

Disclaimers

The issuance of this RFP does not obligate The Partnership to award a contract or to pay any costs incurred in the preparation of a proposal. The Partnership reserves the right to accept or reject any or all proposals received in response to this RFP. The Partnership can cancel or rescind this RFP, in part or in whole, if deemed necessary in its sole discretion.

All contract awards by The Partnership, pursuant to this RFP, are contingent upon the availability of funds. Respondents are liable for any and all costs incurred prior to final authorization by and the execution of a contract with The Partnership.

The Partnership also reserves the right to:

- Rescind an award and/or reallocate the funding to another applicant should the successful respondent fail to execute its grant agreement in a timely fashion;
- Change and amend as necessary its policies or procedures governing the scope of services described herein;
- Perform an assessment of the risk that any recent, current, or potential litigation, court action, investigation, audit, bankruptcy, receivership, financial insolvency, merger, acquisition, or other event might have on an organization's ability to provide services.

Deadline

The due date for submissions in response to this RFP is **June 8, 2018 at 4:30 PM CST**.

Submission Instructions

Submit proposals electronically to financerfp@workforceboard.org.

Questions

Submit all questions to financerfp@workforceboard.org by **May 30, 2018 at 4:00 PM CST**.

Responses to all questions will be posted to The Partnership's website by **no later than June 1, 2018**.