Request for Qualifications

Instructional Designer for Chicago Financial Opportunity Center® (FOC) Network

The National Organization
Local Initiatives Support Corporation (LISC) is dedicated to helping community residents transform distressed neighborhoods into healthy and sustainable communities of choice and opportunity — good places to work, do business and raise children. LISC is one of the largest community development organizations in the nation, with staff in 38 cities and across rural programs serving 2,200 rural counties. Since 1979, LISC has raised and deployed pools of public and private funding to invest $24 billion in grants, loans, and equity, leveraging $69 billion for local development projects and programs. LISC equips communities with capital, strategy and know how to become places where people can thrive. Working with local leaders we invest in housing, health, education, small business, economic development, public safety and employment-all basic needs that must be tackled at once so that progress in one is not undermined by neglect in another.

About LISC Chicago
LISC Chicago is the local office of the nation’s leading community development investment organization. Together with residents and partners, we build resilient and inclusive communities that are great places to live, work, visit, do business and raise families. We are an investor/lender, capacity builder, convener and innovator. Our focus is on equitable development — ensuring that every neighborhood and its residents have the opportunity to benefit from economic transformation by building community wealth. We seek to ensure that as neighborhoods improve, current residents are empowered to stay and contribute to the future of their communities. LISC receives our funding from banks, corporations, foundations and government agencies. We, in turn, use that funding to provide financing (loans, grants and equity) and technical and management assistance to local partners and developers.

Background
LISC Chicago and our partner organizations have been operating the Financial Opportunity Center® (FOC) network since 2005. FOCs help families become more financially secure in three critical areas: employment and/or increased wages; improved financial condition; and improved access to public benefits.

The Theory of Change for the FOC Network is that jobs are not enough for a family to become financially stable, but through the integrated services of income supports, financial coaching and employment services clients connect to the economic mainstream. The FOC is an integrated service delivery strategy equipping low wage earners with tools, support and know-how to boost earnings, build credit, reduce expenses and make sound financial decisions. Each FOC client has access to a network of coaches to help address financial problems from multiple angles including: job placement, retention and advancement; access to public and private benefits to supplement earnings; and managing a budget. Operated by trusted community-based agencies, FOCs forge productive, long-term relationships with clients.

A distinctive feature of the FOC Network is that multiple neighborhoods and agencies are part of a
LISC provides network supports such as a shared data/metrics tracking and reporting platform, documentation of best practices, training and technical support, peer networks, operational support for FOC staff, facilitated linkages and fundraising on behalf of the network. The agencies operating the FOCs provide direct client services, participate in network exchanges and trainings, enter their client and performance data into a shared system, and identify resources to support their local programs. LISC’s primary collaborators are the FOC network which is comprised of the following agencies: Center for Changing Lives, Cara Chicago, Instituto Del Progreso Latino, Jane Addams Resource Corporation, Metropolitan Family Services, North Lawndale Employment Network, Preservation of Affordable Housing, OAI and Youth Job Center.

Description of Services Required
LISC Chicago seeks a curriculum design consultant to create, or identify and modify, a Financial Literacy curriculum focused on investing. The curriculum might start with defining what investing is and is not. These are possible content areas to be covered within the curriculum:

- What is investing and what it is not?
- What is the difference between saving and investing?
- What kinds of investment products are there?
- How the Markets Work?
- What are the rules of investing?
- How can I start investing?

This curriculum will be used by our FOC network partners. The curriculum will introduce investing to program participants. Additionally, once the curriculum is complete the consultant will facilitate “Train-the-Trainer” sessions and teach the FOC partners to use the curriculum.

LISC anticipates that the consultant’s responsibilities will include the following:

- Review the market for existing curriculum to determine & make a recommendation to LISC if the curriculum should be designed from scratch or be modified from an already established curriculum.
- Creation/ modification of curriculum modules into a format that can be delivered in the following formats:
  - In person setting;
  - remote/virtual settings;
  - self-paced, independent setting; and
  - blended approach of any of the three above.
- The curriculum should include instructor’s guides, lesson plans, activities, discussion topics, learning objectives, answer keys, student handouts or materials, list of supplies/videos necessary, and additional resources as necessary.
- Deliver “Train-the-Trainer” sessions to our FOC network partners.
- Update curriculum based our partners use of the curriculum over a period of 30-60 days.
- Meet with LISC team on a biweekly basis (estimated 30 minutes) to review progress on deliverables; correspond with LISC staff in the interim via e-mail as needed.
- LISC also requires the ability to edit the curriculum and documents after the finalized materials are complete, so that the formatting can act as a functional template for future content creation and addition or changes to the materials.
Qualifications
Consultants must complete the attached RFQ form and submit résumés or biographical descriptions of consultants who would potentially provide services as part of this project. Consultant must meet minimum requirements:

• Demonstrated experience designing highly interactive & engaging, practitioner-focused training sessions;
• Comprehensive understanding of best practices in instructional design with a blended learning approach;
• Commitment to using asset-based and racially/social-just language in communicating about the FOC work and the communities that FOCs serve;
• Familiarity with community-based workforce development programming, community-based organizations, and integrated service delivery models such as LISC’s Financial Opportunity Center® model is a plus; and
• Experience in adult basic education, workforce training, and coaching a plus.

Evaluation and Selection Criteria
The LISC Chicago team will evaluate submissions of qualifications based upon experience, expertise, rate/price, availability, and references.

Directions for Submission
Interested consultants should submit their responses according to the format outlined on the following page of this RFQ, with attached resume(s) of consultant(s) who will be providing services under this contract to jmcclain@lisc.org by 10pm CST on Friday, May 12th, 2023.

Questions about this RFQ should only be directly to Jennifer McClain, LISC Chicago Senior Director, Economic Opportunity, Wealth Building and Leadership Development at jmcclain@lisc.org.
Request for Qualifications Form

CONTACT INFORMATION
Please complete the following information. Company Name (if applicable):
Primary Contact:
Email:
Phone Number:
Mailing Address:
Please indicate if you consider your organization to be one of the following.
- Small Business Enterprises (SBEs)
- Minority-Owned Business Enterprises (MBEs)
- Women-Owned Business Enterprises (WBEs)

Provide a description of the deliverables required under this RFQ including an estimated timeline and detailed narrative of the activities.

Please describe your experience relevant to the required qualifications: total years of experience; examples of deliverables and results achieved; other relevant information.

Include a cost estimate including the estimated number of hours required to complete the project. Please note that this is a deliverables-based project and payments will be structured around completion of project objectives. Note: Project must be completed by October 31, 2023.

REFERENCES
Please provide two references.