

# REQUEST FOR PROPOSALS

## Planning & Content Development Consultant

### Financial Opportunity Center® National Convening

#### October 2024

### INTRODUCTION

LISC is issuing this Request for Proposals (RFP) to seek a qualified individual to assist with the development of a national convening for LISC staff, partner intermediary staff, and community-based organizations that are part of LISC's national Financial Opportunity Center® network.

### DISTRIBUTION & SELECTION TIMELINE

This RFP will be posted on the LISC website ([www.lisc.org](http://www.lisc.org)) from March 18, 2024, through April 5, 2024, when responses to the RFP are due. The consultant(s) selected for the work will be notified by close of business on April 15, 2024, or earlier.

### BACKGROUND

LISC supports a network of over 120 Financial Opportunity Center® partners—community-based organizations that provide an integrated “bundled” set of employment services, financial coaching, and income supports access—across the country. The community-based organizations provide direct services to neighborhood residents, and LISC supports the Financial Opportunity Center® network with grants, outcomes tracking and management, and technical assistance on a wide range of topics related to family financial security.

In addition, since 2016, 40 of the 120-plus FOCs have been operating the Bridges to Career Opportunities initiative, a program model that integrates FOC services with industry-contextualized “bridge” instruction to connect unemployed and underemployed people to career and training pathways that help them land and keep good-paying jobs.

### CONSULTING SERVICES NEEDED AND SCOPE OF WORK ELEMENTS

LISC is seeking a consultant to assist staff in its Family Income and Wealth Building program with the planning and development of a Financial Opportunity Center® National Convening. LISC has held several national convenings over the past decade of operating the FOC model and the 2024 national convening will bring together longtime FOCs, new FOCs (including those operating Bridges to Career Opportunities), local LISC offices, funders, researchers, and other community partners for learning and peer networking. The convening will take place in mid-October 2024 in Mesa, Arizona. LISC anticipates a participant count of approximately 250-300. The consultant shall be asked to perform any of the following tasks, with the final scope of work to be determined contingent on the consultant's proposed pricing and LISC's budget. (LISC also reserves the right to select more than one consultant and assign the tasks between the two selected consultants.)

- **Lead Planning Process & Calls.** The consultant will be expected to drive the overall planning process including setting agendas for planning calls, tracking follow-up action items and sharing notes. The consultant will facilitate the planning calls and ensure timelines are met.
- **Agenda Development and Speaker Outreach.** The consultant will be expected to develop an agenda that reflects a clear understanding of the convening themes, flow and needs of the convening participants. Additionally, the consultant is expected to facilitate bi-weekly convening planning calls (60 minutes in duration) with LISC Family Income and Wealth Building staff. As part of facilitating the calls, the consultant will be expected, where possible, to contribute ideas for workshop/plenary

speakers and topics, as well as advise LISC staff on the general structure and flow of the meeting's two-day agenda. Conduct follow-up to the bi-weekly convening planning calls, as directed by LISC staff (for example, making contact with an individual who was identified on a planning call as a potential workshop speaker). LISC anticipates that calls will begin in May 2024 and will shift to a weekly frequency during the peak convening planning time; LISC estimates a maximum of 10 convening planning calls with the Family Income and Wealth Building team between May through October.

- **Content Development.** The consultant will be expected to both generate and provide input on content of plenaries and workshops. Specifically, LISC will expect the consultant to bring workforce development expertise to the planning of the content and help to provide direction and strategy where needed. This could include session objectives, training ideas and/or speaker suggestions.
- **Plenary & Workshop Planning.** LISC expects that the agenda will consist of a mix of plenary/keynote speaker sessions and smaller breakout workshop sessions, all involving some degree of speaker/panelist coordination and preparation. The consultant will schedule and facilitate up to 15 pre-session planning calls that will begin in May 2024. Pre-session planning calls should last approximately 60 minutes and are designed so that speakers and the session moderator (if there is a moderator) can discuss the structure of their session and specific topic(s) that each speaker plans to highlight. At the conclusion of each call, the consultant will submit brief notes about the session to LISC's Family Income and Wealth Building staff. The consultant will also be responsible for gathering speaker PowerPoint presentations in advance of the workshop sessions and storing them in a Box folder that LISC will establish.
- **Event Staffing.** Assist LISC Program Officers in staffing the meeting, which will require being on-site in Arizona during the convening and the afternoon/evening prior to the convening start. (LISC will also consider proposals from consultants who are not able to travel to Arizona for on-site event staffing.)

## CONSULTANT BUDGET AND BILLING

LISC will enter into a "deliverables-based" contract with the consultant, meaning that consultant will be paid a flat fee upon satisfactory completion of each deliverable. Consultant may invoice LISC upon completion of each deliverable, or if preferable, invoice LISC for all deliverables at once at the end of the contract. LISC has not set a minimum or maximum amount for consultant bids in this RFP. The consultant has discretion to propose their fee for each task in the scope of work, keeping in mind that fees must be reasonable relative to the services performed, and that LISC is a nonprofit organization with the obligation to be a responsible steward of its federal and private grant funds.

## CONSULTANT QUALIFICATIONS

Required qualifications include:

1. Minimum 5 to 7 years of relevant experience planning national convenings, convenings or trainings,
2. Experience planning convenings for more than 200 attendees,
3. Workforce industry knowledge and/or experience,
4. Experience designing and developing trainings related to workforce development,
5. Strong oral and written communication skills, and

The following additional qualifications are strongly preferred:

1. Knowledge of the LISC Financial Opportunity Center® model, the LISC Bridges to Career Opportunities model or similar models that promote the delivery of integrated employment, financial, income supports, and/or other social/human services.
2. Experience developing training and/or technical assistance products related to integrated service delivery models.

## RFP RESPONSE INSTRUCTIONS

Consultants must submit a complete response package that includes the following items in order:

1. Proposal cover page (found at the end of this RFP), with all information completed.
2. A narrative (maximum one page) that describes how the consultant meets each of the required qualifications and, if applicable, the preferred qualifications.
3. A brief resume or bio and a list of clients worked with during the past five years. (LISC reserves the right, during the proposal review stage, to request letters of reference from up to three clients with whom the consultant has worked in the past three years; however, consultant is not required to submit reference letters with their response to this RFP.)
4. Consultant's proposed pricing, using the following table of modular tasks. Consultant may choose to bid for all or some of the task areas.

Task	Fee	Timeline
<b>Agenda Development and Speaker Outreach.</b> Facilitate bi-weekly convening planning calls (60 minutes in duration) and perform follow-up communication as needed. <i>Please indicate your fee per planning call in the "fee" box, as well as the total fee for the estimated 10 planning calls. Please incorporate your fee for related follow-up into the flat per-planning call fee.</i>		May-October
<b>Plenary and Workshop Planning.</b> Schedule and facilitate up to 15 pre-session planning calls with workshop speaker and moderators. <i>Please indicate your fee per planning call in the "fee" box, as well as the total fee for the estimated 15 planning calls.</i>		May- October
<b>Event Staffing.</b> Assist LISC Program Officers in staffing the meeting. <i>If applicable, please include all estimated travel costs Mesa, AZ as part of the fee; consultant will not be reimbursed separately for travel expenses. If unable to provide on-site staffing due to lack of availability, simply leave this row blank.</i>		October
<b>Notes/Budget Narrative</b> (A budget narrative is <i>not</i> required for this proposal. However, if you have need to provide further explanation on your bids for any of the above tasks, please use the space below for your notes.)		

LISC will deem as unresponsive and unqualified any responses that do not include all of the above items.

Proposals are due **by email** (in Microsoft Word or PDF format), **no later than 5:00pm Eastern time on April 5, 2024** to **Candi Blake, LISC Family Income and Wealth Building, Program Officer, at [cblake@lisc.org](mailto:cblake@lisc.org)**. Questions about this RFP should only be directed to the contact name identified above.

## EVALUATION REVIEW AND SELECTION PROCESS

LISC's Family Income and Wealth Building department will evaluate proposals based upon: responsiveness

to the criteria described above, completion of experience, rate/price, and availability. Selected consultants will be notified by LISC no later than close of business on April 15, 2024.

LISC is committed to working with SBEs, MBEs, and WBEs, and encourages proposals from SBEs, MBEs, and WBEs.  
**LISC IS AN EQUAL OPPORTUNITY EMPLOYER COMMITTED TO DIVERSITY & INCLUSION**

---

**Consultant Response to Convening Planning RFP**  
**Cover Page**

*Please complete and return with full package to*  
[cblake@lisc.org](mailto:cblake@lisc.org)

<b>Consultant Name:</b>	
<b>Company Name (if applicable):</b>	
<b>Contact information: including address, telephone, fax, email and website, if any</b>	Name:
	Street::
	City: State: Zip:
	Phone: Fax:
	Email:
Website:	
<b>Two-three sentence Bio of Consultant and/or Company including length of time as a consultant. Please attach a resume for the consultant and/or the company.</b>	
<b>Social Security Number, UEI number, or EIN:</b>	