Alliance of Illinois Community Foundations (AICF)

Request for Proposals (RFP)

RFP 2026-01: Illinois Gives Data Collection, Reporting, and Legislative Engagement Support

Issuance Date: November 17, 2026
Proposal Due Date: January 8, 2027
Proposal Selection: By January 31, 2027
Project Dates: February 1-November 30, 2027 (with option for extension if agreed by both parties)
Budget: $25,000-$35,000 (maximum bid amount of $35,000)
Primary Contact:

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I. Background and Purpose

The **Illinois Gives Act**, effective **January 1, 2025**, establishes a **25% Illinois state income tax credit** on qualified contributions to permanent endowed funds held by Qualified Community Foundations (QCFs). The Act incentives charitable giving, increases long-term endowment capacity, and strengthens community philanthropy across Illinois. It is authorized through **tax year 2029**, at which point it may be renewed, modified, or phased out by the General Assembly.

To support the Act's continued success and to build the evidentiary foundation for legislative renewal, the Alliance of Illinois Community Foundations (**AICF**) invites proposals from qualified **consultants, research firms, universities, and data management professionals** with **experience working with nonprofits** to provide a statewide data collection, reporting, promotional materials development, and legislative engagement support project related to the Illinois Gives tax credit program. The initial collection of data would be for tax years 2025 and 2026, and the collection of anecdotal success stories would extend through 2027. Any continuation of the project for subsequent tax years would be contingent on AICF receiving additional grant funding and would be subject to a separate engagement process.

II. Scope of Work

AICF seeks a consultant to perform the following scope of work using data from state tax years 2025 and 2026:

A. Statewide Data Collection

- **Standardized data collection spreadsheet:** Design and distribute a standardized data collection spreadsheet, modeled on the Endow Iowa reporting example, to be completed by each AICF member/Qualified Community Foundation that processed Illinois Gives tax credits during tax years 2025 and 2026.
- **Required data fields:** The spreadsheet should capture a variety of data field to be determined later.
- **Statewide consolidation:** Collect completed spreadsheets from all participating QCFs and consolidate the data into a single statewide dataset for analysis and reporting.
- **Foundation coordination:** Serve as the central point of contact for data collection, providing guidance and technical assistance to member foundations to ensure completeness and consistency of submissions.

B. Reporting and Promotional Materials

- **Summary report:** Produce a summary report of statewide Illinois Gives data for tax years 2025 and 2026, including key statistics such as total donations, total credits issued, number of donors, and geographic distribution.
- **One-pagers and promotional materials:** Develop concise one-page documents or infographics highlighting key program statistics and a few anecdotal success stories from tax years 2025 and 2026, suitable for sharing with legislators, donors, and the public.
- **Success story collection:** Gather 5-10 anecdotal success stories from participating foundations (brief donor or community impact narratives) for inclusion in the report and one-pagers. This is not a full academic case-study effort but rather short, compelling vignettes. Make sure to include foundations of varying sizes and geographical regions of the state. Given that demonstrating the impact of endowment funds is not an immediate process, the collection of success stories will continue through the end of 2027.

C. Legislative and Public Awareness Support

- **Template legislator letter:** Develop a professional template letter that AICF members can customize with their own local project details, donor stories, and foundation-specific data, and send to their respective state legislators in support of the Illinois Gives Act's renewal.
- **Talking points and guidance:** Provide accompanying talking points and brief guidance to help foundation staff personalize the letter and communicate effectively with legislators who may be unfamiliar with the program.
- **Promotional and advocacy materials:** Leverage one-pagers specifically designed for legislative promotion, highlighting key data from tax years 2025 and 2026 and success stories for use in legislative meetings and public communications. Additionally, create template press releases and social media posts that all AICF members can customize and distribute to promote the Illinois Gives tax credit and demonstrate its impact in their communities.

III. Eligibility

Eligible proposers include **consultants, research firms, universities, data management professionals, and communications specialists** with **demonstrated experience working with nonprofit organizations**. Experience with community foundations, philanthropic data management, legislative advocacy, or tax incentive program reporting is preferred but not required. This list is non-exhaustive and does not preclude proposals from other qualified entities.

IV. Required Proposal Elements

Each submission must include:

1. **Executive Summary:** Project objectives and how the proposed approach addresses AICF's data collection, reporting, and legislative engagement needs.
2. **Data Collection Methodology:** Proposed approach for designing the standardized spreadsheet, distributing it to QCFs, ensuring data quality and completeness, and consolidating submissions into a statewide dataset.
3. **Team Qualifications:** Key personnel, roles, and relevant experience in data management, nonprofit reporting, communications, or legislative engagement.
4. **Work Plan and Timeline:** Phase-based schedule for this single-year project with milestones for spreadsheet design, data collection from QCFs, report production, legislative materials development, and final deliverables.
5. **Budget and Justification:** Itemized costs for the full project including personnel, data management tools, and design/production of materials.
6. **Deliverables:** Proposed deliverables aligned with the scope described in Section II, including format and frequency.

V. Evaluation Criteria

Proposals will be evaluated based on the following criteria:

- Alignment with the scope of work and clarity of proposed approach.
- Demonstrated expertise in data collection, management, and reporting for nonprofit or government programs.
- Quality and professionalism of proposed reporting and promotional materials.
- Feasibility and specificity of the work plan and timeline.
- Cost reasonableness and value for money, given AICF's limited budget.
- Understanding of community foundation operations and the Illinois Gives Act.

VI. Project Management and Collaboration

The selected consultant will designate a **project lead** responsible for coordination with AICF, quality control, and schedule adherence. Regular check-ins with AICF leadership are expected

during data collection periods and in advance of deliverable deadlines. The consultant will also coordinate directly with participating QCFs to facilitate timely data submissions. Proposers should describe their approach to managing foundation outreach, ensuring data quality, and mitigating risks related to incomplete or late submissions.

VII. Data, Privacy, and Ethics

Proposals must address data governance, including privacy protections for donor information, secure data handling and storage, and compliance with applicable legal requirements. The consultant should describe protocols for safeguarding personally identifiable information (PII) collected through the data spreadsheets and ensure that any publicly reported data is appropriately aggregated or anonymized. Consent procedures should be outlined for any success stories or donor narratives used in promotional materials.

VIII. Deliverables and Reporting Schedule

- **Consolidated Statewide Dataset and Spreadsheet Template:** Standardized data collection spreadsheet (modeled on the Endow Iowa example) and a consolidated, cleaned statewide dataset compiled from all participating QCFs' tax year 2025 and 2026 Illinois Gives credit data.
- **Summary Report:** Comprehensive report summarizing statewide tax year 2025 and 2026 data with key findings, statistics, and policy-relevant observations.
- **One-Pagers and Promotional Materials:** Concise one-page documents or infographics highlighting key program statistics and anecdotal success stories, suitable for legislative, donor, and public audiences.
- **Legislative Engagement and Promotional Materials Package:** A professional template legislator letter with accompanying talking points, one-pagers presenting tax year 2025 and 2026 data and success stories, and a set of press release and social media templates adaptable for member use.
- **Progress Updates:** Brief status reports to AICF at regular intervals, aligned to the proposed work plan.

Target completion of all deliverables should align with AICF's advocacy timeline and precede any relevant legislative deliberations regarding the Act's renewal.

IX. Submission Instructions

- Submit proposals in **PDF** format via email to: henry@allianceilcf.org
- Deadline: **January 8, 2027**. Late submissions may not be considered.
- Questions and clarifications: Direct inquiries to Henry Mohn at henry@allianceilcf.org.

X. Terms and Conditions

AICF reserves the right to amend or cancel this RFP, to accept or reject any or all proposals, and to negotiate scope, budget, and timelines with the selected proposer. All costs associated with proposal preparation are the responsibility of the proposer. This RFP initially covers an engagement for tax years 2025 and 2026, with the collection of anecdotal success stories through 2027. Any continuation of this project for subsequent tax years is contingent upon AICF receiving additional grant funding and would be subject to a separate RFP or engagement extension at AICF's sole discretion. Selection under this RFP does not guarantee future engagement.