



REQUEST FOR PROPOSAL

Lobbyist Services

1. Introduction

The Municipal Employees', Officers' and Officials' Annuity and Benefit Fund of Chicago (the "MEABF" or the "Fund") is a public employee defined benefit retirement system administered in accordance with the provisions of Article 8 of the Illinois Pension Code (*See* 40 ILCS 5/8-1 *et seq.*). The MEABF provides retirement and disability benefits to non-sworn, non-laborer employees of the City of Chicago and the Chicago Board of Education. The MEABF serves approximately 32,000 active members and 25,000 retirees and/or beneficiaries. The MEABF assets as of December 31, 2021 were \$4.31 billion.

The Retirement Board of Trustees of the MEABF of Chicago (the "Board") is seeking proposals to contract with a lobbyist to represent the MEABF on an annual basis. A contract would run approximately from May 1, 2023 through April 30, 2024, with the possibility of subsequent annual renewals thereafter. The MEABF seeks a strong lobbyist with sound knowledge of budgetary issues, pension funding, a clear understanding of the legislative process and effective communication skills. **The MEABF reserves the right to procure all, some or none of the LOBBYIST services referenced herein from one or more vendors.**

2. The MEABF's Retirement Plan Overview

The plan document and summary plan description are available on the Illinois General Assembly website [here](#) and [here](#). for detailed information.

3. Relationship to the City of Chicago

The MEABF is a multi-tiered, multi-employer pension trust fund of the City of Chicago and as such is included in their annual financial reporting.

4. Scope of Services

The MEABF seeks to retain the services of a lobbyist to work with its Board and Executive Director to address matters in which MEABF needs professional assistance before the Illinois State Legislature, individual State Legislators, and the Illinois Governor. Lobbying services will include (but are not limited to) the following:

1. Strategy
 - a. Assist the MEABF in the development and implementation of its legislative agenda, key proposals and policy positions, primarily relating to funding matters;
 - b. Propose an annual strategic advocacy and political engagement plan designed to achieve legislative goals and support Board objectives;
 - c. Coordinate with MEABF staff as to legislative related matters;
2. Tracking and reporting

- a. Identify, track and report on state legislation and legislative proposals that may have an impact on the MEABF;
 - b. Report activities at a minimum through the following:
 - i. Telephone or weekly updates on pending issues as they arise,
 - ii. A brief weekly written status report during the Legislative Session;
 - iii. A final written report summarizing the results of a Legislative Session;
 - iv. In-person presentations, as requested by the Board of Trustees ;
 - c. Track priorities and meetings of aligned partner organizations;
 - d. Responsible for compliance with state lobby registration and reporting requirements;
3. Advocacy
- a. Support the organization with a strong presence in Springfield as the “eyes and ears” of MEABF and serving as day-to-day contact for legislators and other lobbyists on behalf of the MEABF;
 - b. Work to achieve MEABF goals on legislation, issues or rules by lobbying members of the Legislature, legislative staff and state government officials;
 - c. Track and attend committee and rulemaking hearings, coordinate and assist in the preparation of testimony, submissions, and in-person testimony;
 - d. Attend and participate in interim hearings and meetings regarding issues important to MEABF;
4. Relationship building
- a. Assist in the development of relationships with key legislators, local governments, and community organizations, consistent with the annual strategic advocacy and political engagement plan, as requested by the Board;
 - b. Develop strong connections with other pension funds and collective bargaining units to support mutual goals as identified by the Board.

5. Fee/Costs

The MEABF desires to procure effective lobbyist services at a reasonable and predictable cost, allocated on an annual or monthly basis, unless otherwise agreed by the parties.

6. Instructions to Proposers

All proposals should include the following information:

1. Letter of Interest;
2. Names of the individual(s) who will be working on the project and their areas of responsibility, including each individual(s) responsible for providing any aspect of the services referenced herein or in the responder’s proposal;
3. Experience and qualification of the individuals named above, highlighting their capacity to perform the related functions as outlined in this proposal;

4. A list of at least three clients for whom you have lobbied within the past five years and an example of a success achieved with them. Include the client, contact name, email address and phone number;
5. A complete list of current clients and those served within the preceding twelve months of the submission date;
6. Any conflicts that proposer believes may exist if proposer is selected, between any client of proposer and the MEABF; and
7. Proposed fee structure for lobbying services

7. Contract Terms and Conditions

Nothing herein prohibits the MEABF, at its sole option, from introducing or modifying contract terms and conditions and negotiating with the highest ranked apparent successful vendor to align the proposal to the MEABF's needs, within the objectives of the RFP. The MEABF has significant and critical time frames for this initiative; therefore, should such negotiations with the highest ranked, apparent successful vendor fail to reach agreement in a timely manner as deemed by the MEABF, the MEABF, at its sole discretion, retains the option to terminate negotiations and continue to the next-highest ranked proposal.

7.1 Proprietary Materials

Under Illinois Law (5 ILCS 104/1 *et seq.*), the Freedom of Information Act (Release/Disclosure of Public Records), materials received by the MEABF may be considered public records. These records include but are not limited to bid or proposal submittals, agreement documents, contract work product, or other bid material.

7.2 Readability

Proposers are advised that the MEABF's ability to evaluate proposals is dependent in part on the proposer's ability and willingness to submit proposals which are well ordered, detailed, comprehensive, and readable. Clarity of language and adequate, accessible documentation is essential.

7.3 Proposer Responsibility

It is the proposer's responsibility to examine all specifications and conditions thoroughly and comply fully with specifications. Proposers must comply with all federal, state, and city laws, ordinances, and rules.

7.4 Errors in Proposals

Proposers are responsible for errors and omissions in their proposals. No such error or omission shall diminish the proposer's obligations to the MEABF.

7.5 Incorporation of RFP and Proposal in Contract

This RFP and the proposer's response, including all promises, warranties, commitments, and representations made in the successful proposal, shall be binding and incorporated by reference in the MEABF's contract with the selected proposer.

7.6 Proposal Disposition

All material submitted in response to this RFP shall become the property of the MEABF upon receipt by the MEABF.

8. Submission Information and Deadline

This Request for Proposal is issued March 16, 2023. Proposals are due no later than 4:30 pm Central Standard Time on April 14, 2023. Proposals must be delivered ELECTRONICALLY to: Donna Hansen, Office Manager, Municipal Employees' Annuity and Benefit Fund of Chicago, hansend@meabf.org.

Question regarding the RFP should be directed via email to: Sarah Boeckman, Interim Executive Director, boeckmans@meabf.org.