



Request for Qualifications – Revised 9.10.24

Please see highlighted areas for specific revisions made.

I. Introduction

The Yolo Community Foundation (YCF) is building a roster of prospective subcontractors who are authorized to work on YCF's Yolo Nonprofit Excellence in Operations Navigator (Yolo NEON) initiative and perhaps future projects. With funding from Yolo County, Yolo NEON will help 25-50 Yolo County-based nonprofits to increase efficiency and decrease risk by strengthening their operational foundations (e.g., finance, human resources, legal, etc.), thus increasing their capacity to serve the people of Yolo County. See Addendum A for a description of Yolo NEON.

II. Subcontractor Expertise

Yolo NEON will support nonprofits to develop strong policies and procedures in key areas of back-office operations. To meet this goal, YCF seeks subcontractors with subject matter expertise in finance and accounting; human resources; legal, compliance, and governance; information technology; project management; and other areas of operations that are critical to a well-run nonprofit. See Addendum B for more details about these areas of expertise.

YCF is open to applications from a wide range of prospective subcontractors with relevant subject matter expertise, including independent consultants, consulting firms, academics, professional services providers, nonprofit organizations, educational institutions, associations, and the like.

III. Subcontractor Activities

Subcontractors will conduct the following activities, with support and engagement from YCF. Please note that each subcontractor may focus on one or more of these activities:

- **Materials Development**: Develop a list of the key policies and procedures that a well-run nonprofit should have in the subcontractor's area(s) of expertise. Develop or curate sample documents, best practice documents, checklists, or other materials to support nonprofits as they refine or develop these policies and procedures.
- **Group Training**: Conduct group trainings in the subcontractor's area(s) of expertise. We anticipate offering one training, likely delivered on 3-4 occasions, in each core operational area (finance and accounting; human resources; legal, compliance, and governance; and information technology). These trainings will be delivered in both a cohort model (6-12 nonprofits going through multiple trainings together) and a non-cohort model (stand-alone trainings that any local nonprofit may join). In addition, we may offer trainings in approximately two additional operational areas; these will be offered only as non-cohort trainings.



- **One-On-One Support:** Conduct one-on-one sessions within the subcontractor’s areas(s) of expertise. For instance, subcontractors may help a nonprofit adapt a sample policy to their needs or review a draft policy. These sessions will take place after a nonprofit has completed the group training.
- **YCF Support:** While the primary role of the subcontractors is to support our nonprofit participants, we are also seeking subcontractors with legal, project management, **event planning, and communications** expertise to provide support to YCF as we implement this program.

IV. Program Timeline

	2024			2025											
	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Cohort Model	Round 1: Pilot – One cohort (6-10 nonprofits) 6 months (exact dates TBD) Core operations areas only (finance and accounting; HR; legal, compliance, and governance; IT) Group training & one-on-one sessions														
							Round 2: Two cohorts, running simultaneously (15-25 nonprofits total) 6 months (exact dates TBD) Core operations areas only Group training & one-on-one sessions								
Non-Cohort Model	6-12 one-off trainings, open to any Yolo County nonprofit Core operations areas, plus approximately two additional operational areas Group training and likely one-on-one sessions														

We estimate that each of the core operations areas will require roughly 80 hours of subcontractor time. This may include approximately 25 hours of planning, materials preparation, presentation preparation, etc.; about 6-10 hours of group trainings; and about 45-50 hours of one-on-one sessions. For the additional operational areas that are only presented outside the cohort model, we expect a commitment of about 40 hours per area, breaking down to about 15 hours of planning and preparation, about two hours of group training, and about 20 hours of one-on-one sessions. We expect this estimate to evolve based on feedback from subcontractors and pilot learnings.

V. Selection Criteria & Subcontractor Requirements

Subcontractors will be selected based on the applicant's 1) expertise in operational area(s) of relevance to Yolo NEON, 2) experience working with nonprofits, 3) capacity to excel in the activities they propose to take on (materials development, group training, one-on-one support, and/or YCF support); and 4)



proposed budget in the context of their expertise (i.e., value). We will also consider how the applicants would fit together into a roster of subcontractors working together to deliver this program.

Subcontractors should have least three years of experience in the relevant operations area(s), as well as at least three years of experience working with nonprofits. (Nonprofit experience may include part-time roles, such as board service, consulting projects, research, etc.) We prefer that subcontractors that deliver group trainings in the cohort model be willing to do so in person in Yolo County. Non-cohort group trainings and one-on-one support sessions may be in-person or virtual. Materials development and YCF support work are expected to require little or no in-person work. Proximity to Yolo County is a plus for subcontractors delivering one-on-one support sessions but is not required. (We do not anticipate reimbursing travel expenses.)

VI. Application Instructions

Please submit your responses to the following questions via email, with attachments (PDF or Word preferred) and/or links as relevant, to info@yolocf.org by September 18, 2024 at 11:59pm:

1. In which operational areas of relevance to Yolo NEON (see Addendum B) are you interested in serving as a subcontractor? Within each operational area, please note in which topics you have expertise. You are welcome to include additional operational areas and/or topics within operational areas that are not listed in Addendum B which you believe are critical to a well-run nonprofit. For each operational area, please note whether you would like to participate in materials development, group training, one-on-one support and/or YCF support. (YCF support is limited to project management, legal, **event planning, and communications** support.)
2. Please submit a biography or resume for each member of your team who would be a key contributor to this project. Please also submit 2-3 relevant work examples (e.g., client case study, brief project description, relevant article you've authored, etc.). There is no need to create new content if this already exists – you may submit a link to a relevant page on your website, your LinkedIn profile, etc.
3. Describe your proposed compensation.
4. Describe any conflict of interest you may have with respect to this project.
5. You are welcome to include any other thoughts or information that you feel is important that we have not requested.

Late applications will not be accepted, and any corrections or resubmissions must be received before the deadline. It is your sole responsibility to ensure that your application is received before the deadline. YCF may request follow-up information or clarification. This RFQ does not commit YCF to award a contract. YCF will not pay any costs associated with the preparation of a response to this RFQ. YCF reserves the right to cancel this RFQ, in whole or in part, as well as to accept all or part of any application.

By applying, you confirm that you have read this RFQ in full, have had the opportunity to share your questions and received any answers needed, and feel able to commit to supporting the overall Yolo NEON program.



VII. Applicant Support

We will host optional three virtual office hours sessions for prospective applicants:

- Wednesday, August 21, 10:30-11:30am, register [here](#)
- Tuesday, September 3, 1-2pm, register [here](#)
- Thursday, September 12, 2-3pm, register [here](#)

These are open sessions with no agenda; you are welcome to ask your questions. These sessions will be recorded, so that all prospective applicants will have access to the information shared. The recordings will be saved to [this folder](#), along with any other resources or information that we believe may be helpful to prospective applicants.

You may also reach out to us with questions at info@yolocf.org. Please note that our executive director Jessica Hubbard, who is managing this project, has limited availability to respond to emails in much of August; we have accounted for that limitation in setting the RFQu timeline.

VIII. About the Yolo Community Foundation

The Yolo Community Foundation inspires and supports giving and provides philanthropic leadership in Yolo County. This fast-growing organization administers donor-advised funds and other philanthropic vehicles, educates and inspires donors, and offers grants and training programs to local nonprofits. YCF currently has more than 100 philanthropic funds valued at over \$12 million and is an affiliate of the Sacramento Region Community Foundation. Visit www.yolocf.org to learn more about our programs and impact.



Addendum A: Yolo NEON Program Description

Excerpt from Yolo Community Foundation Contract with Yolo County (Yolo NEON funder)

Yolo NEON will help 25-50 Yolo County-based nonprofits to increase efficiency and decrease risk by strengthening their operational foundation (e.g., finance, HR, legal, etc.), thus increasing their capacity to serve the people of Yolo County.

Program Overview

Through this project, we will guide nonprofits through the process of refining their back-office policies and procedures, for the purpose of maximizing impact by increasing efficiency and decreasing risk. Back-office functions that are addressed through this program may include finance, legal & risk management, human resources, technology & security, etc.

First, in partnership with relevant subject matter experts, we will create a checklist or roadmap in each of our priority operations areas that covers the policies, processes, and procedures that a well-run nonprofit should have in place. (For instance, within finance: A check request process should include a minimum of two approvals, with appropriate separation of duties, and the board of directors should be reviewing financial statements on a regular basis. Within legal, organizations should comply with California law about exempt vs. non-exempt employees and their bylaws should be compliant.)

Then, in partnership with our experts, we will build on this checklist with a six-part program:

1. **Assessment Tool:** We will develop an assessment tool that participating nonprofits will use to identify which operational areas need significant work, which need moderate work, and which are areas of strength for the organization. YCF staff will provide support to the organizations as they complete this process and develop a custom work plan to strengthen their operations.
2. **Best Practice Library:** With participation from our subject matter experts, we will create a library of sample or best practice policies, processes, and procedures in each area of operations. We don't want nonprofits to spend time developing policies from scratch when providing a sample or best practice will substantially increase their efficiency, as well as the quality of their outcome. Where good examples already exist in the public domain, we will curate those, adding context where necessary. Where good examples do not exist, we will develop them.
3. **Expert Support:** The participating nonprofits will have extensive support as they move through this process. The subject matter experts we identify will provide training and advice within their areas of expertise. This may include group trainings and/or one-on-one sessions (e.g., helping a nonprofit adapt a sample policy to their needs, reviewing a draft, etc.). In addition, each participating nonprofit will meet regularly with a YCF staff person to serve as a coach, guide, or accountability partner throughout the process.
4. **Seal of Operational Excellence:** We will develop a rating tool to help funders in the region, including Yolo County, to identify organizations with a strong operational foundation for their programs. As nonprofits complete the Yolo NEON program, they will have the option of applying for this assessment, which may be the YCF Seal of Operational Excellence or a similar designation. (Organizations that do not participate in the program, but who believe their



operations are strong, could potentially also be eligible to apply.) The evaluation process will allow the organization to identify any further areas of need.

5. **Cohort Model:** Our past programming, particularly our Executive Directors Circles pilot, has demonstrated the value of peer learning, support, and collaboration between local nonprofits. Organizations will go through this program in a cohort. We will facilitate regular meetings, through which organizations support, provide accountability to, and learn from one another. We anticipate that approximately 20-35 nonprofits will participate in the cohort model – likely 6-10 during the Phase 1 pilot (one cohort) and 15-25 during the phase 2 expansion (two cohorts running simultaneously).
6. **NPLA Expansion:** In addition, we will make an unbundled version of this program available to nonprofits that are not part of the cohort via the Yolo County Nonprofit Leaders Alliance, which YCF co-hosts. This will allow us to expand our reach and test the “dose” of support required to be effective. The subject matter experts that offer trainings to the cohorts will also offer trainings that are open to any Yolo-based nonprofit to participate in on a one-off basis. In addition, we may incorporate additional relevant subject matter experts, beyond those that are training the cohort participants. Experts that offer trainings may also offer office hours to Yolo nonprofits, similar to the one-on-one trainings offered to cohort participants. We anticipate that that 20-40+ nonprofits will participate in at least one Yolo NEON session offered via the NPLA Expansion.



Addendum B: Yolo NEON Areas of Expertise - Details

Within each area of operations, the following topics may be relevant. However, we defer to our subcontractors as experts on the critical policies and procedures in each category; we do not expect that all topics listed below will be covered. Please note that our focus is on supporting nonprofits to create a strong operational foundation by adopting effective policies and procedures. There is work within each of these areas beyond policy and procedure development that is critical to a well-run nonprofit; however, those are outside the scope of this initiative.

Accounting and financial management and oversight: Budgeting processes; Reserve policies and related issues (e.g., how much to have in reserve, what to do with funds in reserve etc.); Internal controls (separation of duties, bill paying policies, bank account access, reimbursement procedures, corporate cards, etc.); Other accounting procedures (accruals, receipt policies, audits, etc.); Financial reporting (including performance management metrics); Tax forms, filing deadlines, and other reporting requirements; Use of restricted funds; Risk management (insurance, etc.); Investing; Board's role in financial oversight

Human Resources: Employment law (exempt vs. non-exempt status, employee vs. contractor considerations, wage and hour considerations, employee handbook, accommodations, intern and volunteer rules, etc.); Hiring policies and procedures; Compensation and benefits (pay scales, PTO and other leave policies, payroll policies & procedures, overtime rules); Talent management and employee evaluations; Training and professional development; Diversity, equity, & inclusion; On- and off-boarding; Remote workplace policies; Succession planning and cross-training; Workplace safety

Legal, Compliance, and Governance: Bylaws; Board member roles and duties; Board structure; Board assessment; Board training (including on- and off-boarding); Board diversity; Registration and other filing requirements; Contracts; Public policy & advocacy; Fundraising rules (including registration requirements); Ethics policies – whistleblower, nepotism, conflict of interest, etc.

Information Technology: IT security; Data management; Software and hardware

Other Areas of Operations: These may include additional back-office operations areas or the operations side of non-back-office functions (e.g., fundraising isn't a back-office function, but fundraising operations may fit this initiative). These areas will be chosen based on nonprofit feedback and responses to this RFQu. Options may include the following: Project management; **Program operations (program evaluation, program assessments, data collection, analysis, and reporting)**; Fundraising operations; Marketing operations; Strategic planning; Performance assessment; Facilities management; Procurement; **Event planning and operations**.

We recognize that these areas may overlap (e.g., legal includes areas of human resources) or that a given area may require multiple experts for a comprehensive training (e.g., within HR, legal considerations vs. hiring vs. talent management). We are open to hiring a subcontractor covering multiple operational areas, or to hiring more than one subcontractor within a single operational area.