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Response to RFP For Fiscal Sponsor

Please review the published RFP document together with the Response Questions below. UCD appreciates your succinct and complete responses to each question or field. Please make sure all fields have a response before final submission. Partial completion of the form is possible, prior to submission. Please note, there is only one response allowed for each organization. Thank you for your interest in responding to UCD for this Fiscal Sponsorship RFP.

There are no character limits to the questions below. For questions where you are asked to provide several documents please create a PDF with all requested documents and upload one file only.

You may save your work by clicking on Done and make changes up until submission deadline. You must use the same device to be able to access the RFP repeatedly.

1. Please provide organization's name and contact information.

Name of Organization	<input type="text"/>
Street Address	<input type="text"/>
City, State & Zip Code	<input type="text"/>
Respondent Primary Contact Name and Title	<input type="text"/>
Primary Contact Email	<input type="text"/>
Primary Contact Phone Number	<input type="text"/>
Respondent Secondary Contact Name and Title	<input type="text"/>
Secondary Contact Email	<input type="text"/>

2. What are your organization's reasons for wanting to serve as UCD's Fiscal Sponsor?

3. How does your organization's mission align with UCD's purpose? (RFP Section 5a)

4. We affirm our organization is in full compliance with all legal, tax and regulatory requirements as described by applicable IRS Code Provisions. (RFP Section 5b)

Yes

No

5. Please describe your organization's capability to:

Manage all funds, assets and other resources under its control with a high degree of responsibility, integrity, transparency and accountability. (RFP Section 5c)

6. Please describe your organization's capability to:

Manage all administrative duties and responsibilities professionally and with a high degree of integrity and accountability. (RFP Section 5d)

7. Please describe your organization's capability to:

Timely and effectively communicate with project leaders, donors, grant makers, and funding agencies in ways that supplement the project leader's communications. (RFP Section 5e)

8. Please describe your organization's capability to:

As possible and appropriate make available training, counsel and technical assistance to UCD staff. (RFP Section 5e)

9. Please describe your organization's capability to provide periodic assessment and evaluative feedback. (RFP Section 5e)

10. Please describe your Board's capability to:

Govern ethically, avoid conflicts of interest, and effectively carry out its legal, fiduciary and policy making responsibilities. (RFP Section 5f)

11. Please provide biographies and qualifications for your key leadership staff: Executive Director, Operations leader, Finance leader, Fundraising leader, Marketing/Communications leader, Programs leader, Human Resources leader, etc. (RFP Section 5g)

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12. Please describe you proposed Fiscal Sponsor fee structure. (RFP Section 5h)

13. Please affirm your Board's understanding and willingness to delegate all day-to-day operational management to UCD's Executive Director and Steering Committee through the execution of a Fiscal Sponsor Agreement. (RFP Section 6)

We understand the Board of Directors will delegate all UCD's day-to-day operations to UCD's Steering Committee and Executive Director.

We agree to enter into a Fiscal Sponsor agreement with UCD.

If there are concerns, please indicate:

14. **Financial Management, Administration and Accounting:** please describe your organization's finance function, including staffing, process for ensuring reporting requirements, production of monthly financials, and your budgeting process. (RFP Section 6)

15. **Grants and Contract Administration:** please describe your grant management process, staff responsible for this function, and how you ensure timely reporting and grant compliance. (RFP Section 6)

16. **Human Resources:** please describe your staff engagement and retention strategy, performance management, protection from any forms of discrimination in the workplace, and grievance reporting and resolution process. (RFP Section 6)

17. **Payroll:** please describe your payroll processing system and how you ensure IRS, DOL, and other regulatory compliance. (RFP Section 6)

18. **Accepting and Processing contributions:** please describe your policies related to accepting and processing donor contributions. (RFP Section 6)

19. Please indicate if your organization would provide the following services and give brief detail of what these would entail: (RFP Section 6)

Support for fundraising activities

Information Technology services

20. Certification:

1. I am authorized to submit this RFP as representative for the organization and to carry out the services solicited in this RFP.
2. Our organization is in full compliance with all legal, tax and regulatory requirements as described by applicable IRS Code Provisions. (RFP Section 5b)
3. Our Board of Directors governs ethically, avoids conflicts of interest, and effectively carries out its legal, fiduciary and policy making responsibilities. (RFP Section 5f)
4. We have not within a three-year period preceding this RFP been convicted of or had a civil judgment rendered against our organization for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, State, or Local) transaction or contract under a public transaction in violation of federal or State antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification, or destruction of records, making false statements, or receiving stolen property.
5. Our organization is a drug-free workplace and has a Board-approved policy statement notifying employees that the unlawful manufacture, distribution, dispensing, possession or use of a controlled substance is prohibited in the workplace and specifies the consequences of any such action by an employee.
6. We agree to disclose any familial or business relationship with UCD's Steering Committee and/or members of UCD's Executive Committee.
7. Our organization abides by all IRS regulations regarding Lobbying.
8. Our organization is current on Unemployment Insurance taxes and abides by all payday laws and regulations, including the recording and payment of overtime for non-exempt staff.
9. organization is committed to promoting equal employment opportunity and provide equal opportunity in all employment matters without regard to race, color, sex, religion, national origin, age, disability, sexual orientation, or any other protected group. Our organization takes positive steps to eliminate any systematic discrimination from HR practices. Staff at all levels is responsible for active program support and personal leadership in establishing, maintaining, and carrying out an effective equal employment opportunity program.

I certify all answers are true and we are in compliance with all state and federal regulations.

21. Please provide three letters of support: one from a funder, and two from a partner organization or key alliance.

Please create one PDF file to upload. File size limit is 16MB.

No file chosen

22. Please provide your organization's employee benefit package options and associated costs.

Please create one file to upload. File size limit is 16MB.

No file chosen

23. Please complete and upload the past performance reference sheet found in RFP.

Please create one PDF file to upload. File size limit is 16MB.

Choose File

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No file chosen

24. Please provide an organizational chart

Please create one PDF file to upload. File size limit is 16MB.

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No file chosen

25. Please provide your Board of Directors directory and biographies for your Chair, Vice Chair, Treasurer and Secretary or Executive Committee, if applicable.

Please create one PDF file to upload. File size limit is 16MB.

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No file chosen

26. Please provide:

- Most recent audit
- Current year's budget
- Financials - balance sheet, P&L, statement of cash flows for current year.

Please create one PDF file to upload. File size limit is 16MB.

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