

**ECONOMIC DEVELOPMENT COLLABORATIVE
REQUEST FOR QUALIFICATIONS
FINANCIAL AND PROGRAM SERVICE INTEGRATION MANAGEMENT CONSULTING
SERVICES**

PURPOSE AND EDC BACKGROUND

A. Purpose

EDC has experienced substantial growth over the past several years, expanding from 5 to 12 staff members, broadening its program scope, and increasing from some \$5 million in annual program service revenue to \$12 million, plus managing \$9 million in loan capital. This rapid expansion has increased demands on our administrative infrastructure.

While we are seeking to enhance our administrative capacities, we are also seeking to do so at the same time as we project program and revenue uncertainty going forward. Given such volatility, it is important that we maintain our flexibility, such that allows us to adjust to scale, to growth and decline in revenue.

By this RFP we are seeking proposals to on-board capacities in two areas:

1. Advisory and technical assistance services for facilitating the on-boarding of new Accounting and CFO service contractor/partner
2. Advisory and technical assistance for improving the integration of program and financial management systems.

Bidders may note that by a separate Request for Proposals we are also soliciting proposals for full service outsourced bookkeeping, accounting and fractional CFO services. For information, go to www.edcollaborative.com.

General Submittal Information: Interested parties must submit proposals for receipt by EDC no later than **10:00 a.m. on Monday, November 10, 2025**. Late responses will not be considered.

See detailed submittal instructions with each of the three focus areas below.

B. Background Information, EDC

Established in 1996, EDC-VC is a California not-for-profit, 501 (c) (3) entity, organized as a public/private partnership, dedicated to growing the region's economy.

The EDC currently employs 12 FTEs and maintains a base of more than 50 contract consultants and business advisors. We are service-driven and outcome-oriented, funded primarily by performance-based grants and contracts from federal, state, and local public agencies, providing business advising, alternative lending, professional training, and economic development services.

For major programming, we administer the Ventura and Santa Barbara Counties [Small Business Development Center](#), providing through a team of more than 50 professional advisors technical assistance to some 2,000 firms annually. We assist businesses to access capital both through connections to other lenders and through our own [direct lending](#). We maintain special capacity for the larger Los Angeles region for targeted assistance in [international trade](#), business start-up and innovation, manufacturing, and business process improvement. EDC also serves as the [Ventura County Film Commission](#), the lead for the Pacific Coast Broadband Consortium under contract with the CA Public Utilities Commission, is designated by the Governor's Office of Business & Economic Development as an [Inclusive Innovation Hub](#) grantee, and serves as fiscal agent and co-convenor for [Uplift Central Coast](#), a six-county multi-million and multi-stage initiative for planning and implementing a resilient and inclusive regional economic ecosystem.

The EDC's mission is to create empowered business owners, connected community partners, and informed civic leaders in the greater Ventura and Santa Barbara County region.

Our vision is for a strong and healthy Ventura and Santa Barbara regional economy with a high quality of life and broadly shared opportunities.

For more on EDC, go to <https://edcollaborative.com/>; for more on staffing, advisors, and the board, go to the "About" tab; for a profile of recent service activities, see our [2024 Community Impact Report](#).

SCOPES OF WORK:

As noted above, this RFP includes invitations for proposals on two separate scopes of work, seeking to on-board capacities in two areas:

- 1. Advisory and technical assistance support for financial and administrative systems change;**
- 2. Advisory and technical assistance for improving the integration of program and financial management systems.**

Each separate project area is described in detail below, including submittal requirements and review criteria. Proposers may bid on more than one scope of work, but each scope requires a complete and separate proposal.

For additional information, contact

Bruce Stenslie, EDC President/CEO
805-794-0455 bruce@edcollaborative.com

Project Area 1: Technical assistance and advisory support for financial and administrative systems change

I. Scope of Work/Knowledge and Experience:

A. Scope of Work:

1. Advisory and technical assistance services for facilitating the on-boarding of new Accounting and CFO service contractor/partner:
 - Coordinate/collaborate financial systems onboarding with EDC functional leads in finance and administration:
 - Provide support relating to the adoption of finance and administration systems and software, relating to:
 - Accounting
 - Budgeting
 - Cash management and forecasting
 - Cost allocation/general & administrative
 - Payroll
 - Contract and procurement management
2. Participate in the development of recommendations for an organization-wide Technology Plan, for streamlining operations and improving systems integration:
 - Focused consideration for integrated project, financial and grant management and reporting systems and operational processes
3. Participate in the assessment of options, developing recommendations for optimizing organizational chart and structure:
 - Collaborate all assessments and recommendations with EDC management team, including other finance and administrative consultants and partners
4. Facilitate implementation and adoption of systems change as addressed above and as directed by EDC President/CEO.
5. Reports to President/CEO; providing periodic status reports and other topical and analytic reports as requested.

B. Knowledge and experience:

1. **Financial Management System Integration and Optimization:** Possess technical expertise in deploying and enhancing financial and program management systems, QuickBooks and Blackbaud FinancialEdge or similar platforms. Skilled in creating dashboards, KPI tracking tools, and responsive reporting processes that support diverse funding structures and enable real-time decision-making.
2. **Organizational Development for Nonprofits:** Extensive experience in systems change relating to administrative and financial management, including skills in organizational assessment, workflow redesign, and change management processes. Proven ability to develop clear reporting lines, role definitions, and implementation plans for structural change in complex multi-program organizations.

3. **Executive Leadership and Governance Structure Optimization:** Demonstrated capacity for designing and informing executive-level positions and succession planning frameworks within public/private partnership environments. Experience working with diverse governance structures that include multiple governmental entities, educational institutions, and private sector stakeholders to ensure effective administrative coordination and accountability.
4. **Multi-Program Cost Center Analysis and Forecasting:** Skilled in conducting thorough cost center analysis across various program portfolios. Experienced in improving information flow between different operational areas and developing integrated project management and evaluation methods for organizations with multiple revenue streams and program delivery models.

II. SELECTION PROCESS, EVALUATION CRITERIA

a. **Selection Process**

1. EDC President/CEO will screen and review submittals for satisfying basic qualifications.
2. A review committee will evaluate submittals and schedule interviews with finalists as determined per their discretion.
3. The review committee will recommend to the President/CEO a consultant for engagement, with the President/CEO making a recommendation to the EDC Executive Committee and full Board of Directors for final approval.
4. With Board approval, the President/CEO will negotiate an engagement for services, intended for award by the end of November 2025.

b. **Evaluation Criteria** will include the following (*see submittal formatting and additional detail in Section III below*)

1. Identification of experience and commitment by the proposed **lead consultant** for engaging with the EDC leadership and staff.
2. Responsiveness to the scope of work, with clear responses to each of the stated elements.
3. Experience of the consultant, specifically depth of expertise relative to each element of the scope of work.
4. Fee structure and hourly rates (while a significant factor, cost is not the dominant consideration, though may be when other evaluation criteria are met with relative equivalence).
5. Interest and commitment to the EDC Mission for regional economic development, capacity to satisfy the scope of work and consultant compatibility as demonstrated through the review process.

III. SUBMITTAL OF QUALIFICATIONS

To obtain the maximum degree of comparability for a uniform review process, proposals must be organized as follows, all in a single pdf document:

a. **Title Page, Consultant Profile, Name and Location of the Primary Consultant for this Engagement**

1. Include Firm/Consultant name, local address, and telephone number; state the name of the contact person for the proposal, and date.
2. State whether the consultant is local, national, or international.
3. Provide the location of the primary office from which services to EDC are to be provided.
4. Provide the name of the lead consultant proposed for this engagement.
5. Fee structure.

b. **Summary of Consultant's Qualifications**

1. **Scope of Work:** In a narrative summary *not to exceed four pages* provide a succinct response to each of the Scope of Work elements identified in Section B above.

Please provide the responses in the same order as outlined in Section I.B.

2. **Relevant Experience, References:** On one page separate from the narrative requested above, briefly list and describe other engagements that have some similarity or other relevance for demonstrating capacity for providing the services identified in the Scope of Work above (Sections I.A & B).

Provide three references, contact information to include name, title, phone number, and organizational affiliation.

3. **Resumés, other demonstrations of expertise and experience.** Please provide resumés for the lead and any additional primary providers of services as proposed. Proposers are also encouraged to attach any work product or other material that demonstrates expertise and experience.

c. **Submittal Instructions:**

1. The submittal must be received by 10:00 a.m. on Monday, November 10, 2025.
2. Late proposals will not be accepted.
3. Submittals are to be presented in a single PDF document, with "Management Consulting" in the subject line.
4. Submittals will only be accepted via email to Bruce Stenslie, EDC President/CEO, bruce@edcollaborative.com.
5. All submittals received will be provided a receipt for their submission by email. If you do not receive an emailed confirmation, or you wish to call and verify receipt, you may contact Bruce Stenslie at 805-794-0455.

6. All other questions or correspondence concerning this request for qualifications should be directed to: Bruce Stenslie, President/CEO, (805) 794-0455, bruce@edcollaborative.com.

IV. SUMMARY, NEGOTIATION, ENGAGEMENT LETTER

EDC reserves the right to reject any and all proposals submitted and to request additional information from those making proposals.

The award will be made to the consultant, which, in the opinion of EDC, is best qualified.

After selection of the contractor, EDC reserves the right to enter into negotiations with the contractor for this scope of work as presented, and/or for additional work, and/or to further define work requirements for the engagement period.

While the initial engagement is intended for 13 months (December 1, 2025 – December 31, 2026, with EDC's discretion for extension, EDC may elect to negotiate an engagement for a shorter or longer term.

No services may be authorized or invoiced without a jointly agreed-upon and approved engagement letter.

Project Area #2: Advisory and technical assistance for improving the integration of program and financial management systems

I. SCOPE OF WORK/KNOWLEDGE AND EXPERIENCE:

A. Scope of Work

Phase 1: Administrative Structure Review

- The main goal of this phase is to develop and propose options for an efficient decentralized administrative structure to replace a management system that is currently too centralized.
- This phase should include a detailed organizational assessment examining the current staffing structure, reporting lines, and workflow evaluation to identify areas needing improvement.
- Based on this assessment, the consultant will develop a recommended organizational chart with clearly defined roles, responsibilities, and reporting lines that support a more decentralized management approach. Additionally, an implementation roadmap will be created, outlining specific steps and timelines for organizational change.
- Finally, a succession planning framework will be put in place, focusing on executive roles to guarantee organizational continuity and leadership growth.

Phase 2: Financial Systems and Business Model Optimization

- This phase aims to align a new financial management system with the EDC's diverse programming and knowledge infrastructure. In partnership with the Financial Systems consultant, the consultant will develop flexible project planning, evaluation, and management practices that enhance program planning and forecasting.
- The consultant will examine existing processes and offer recommendations for improving information flow and financial reporting to support timely and accurate financial decision-making. A key part involves developing an integration strategy for EDC's anticipated on-boarding of a new outsourced accounting and fractional CFO team, ensuring a smooth transition and optimal use of the contractor's capacities.
- Key deliverables include developing financial dashboards and KPI tracking systems that offer real-time insights into organizational performance. The phase will conclude with implementing procedures that enable cost center analysis across all programs, including the Small Business Development Center, Workforce Development, Lending, and Regional Economic Development initiatives.

B. Knowledge and experience:

1. **Organizational Development for Nonprofits:** Extensive experience in shifting centralized management structures to efficient decentralized administrative

models, including skills in organizational assessment, workflow redesign, and change management processes. Proven ability to develop clear reporting lines, role definitions, and implementation plans for structural change in complex multi-program organizations.

2. **Executive Leadership and Governance Structure Optimization:** Demonstrated capacity for designing and informing executive-level positions and succession planning frameworks within public/private partnership environments. Experience working with diverse governance structures that include multiple governmental entities, educational institutions, and private sector stakeholders to ensure effective administrative coordination and accountability.
3. **Financial Management System Integration and Optimization:** Possess technical expertise in deploying and enhancing financial and program management systems, especially QuickBooks and Blackbaud FinancialEdge or similar platforms. Skilled in creating dashboards, KPI tracking tools, and responsive reporting processes that support diverse funding structures and enable real-time decision-making.
4. **Multi-Program Cost Center Analysis and Forecasting:** Skilled in conducting thorough cost center analysis across various program portfolios. Experienced in improving information flow between different operational areas and developing integrated project management and evaluation methods for organizations with multiple revenue streams and program delivery models.
5. **Regional Partnership Analysis and Success Metrics Development** - Expertise in stakeholder mapping, regional resource constellation analysis, and developing comprehensive success metrics frameworks. Experience in creating measurable indicators for business impact, workforce development outcomes, and partnership effectiveness, including benchmarking methodologies and data collection systems for performance evaluation.

II. **SELECTION PROCESS, EVALUATION CRITERIA**

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 - a. Include for each of these a reference, contact information to include name, title, phone number, and organizational affiliation.
 - b. Provide three references, contact information to include name, title, phone number, and organizational affiliation.

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