A close-up photograph of a woman with dark hair pulled back, wearing black-rimmed glasses and a light blue textured blazer. She is looking down at a smartphone held in her hands. The background is softly blurred, suggesting an indoor setting. The overall tone is professional and focused.







Nonprofit,
government
and education
solutions
guide

WIPFLI

Table of

contents

Key

-  Mission
-  Digital
-  Compliance
-  Financial optimization
-  Vision and strategy
-  Talent planning and development

Mission 3

Digital

IT health check	4
IT performance improvement	5
CIO advisory services	6
Constituent experience solutions	6
Technology deployment	7
Business intelligence	7
Cybersecurity	8

Compliance

Audit services	10
Form 990	10
Human capital management	11
Employee benefit services	11
Risk management	12
My Wipfli membership service	13

Financial optimization

Financial systems	14
Accounting outsourcing	15
CFO outsourcing	15
Fiscal policies and procedures	15

Vision and strategy

Strategy	16
Operations	16

Talent planning and development

Talent	18
Change	18
Training	19

Mission

You want to be the best service provider possible while remaining fiscally sound and compliant with all funders.

You want to have a workplace that continues to advance.

And you want to be able to sleep at night, knowing that your organization did everything it could to achieve its mission that day.

We can help.

Every day, our team works with nonprofit and government organizations like yours to help you meet your goals.

Our mission is to serve you so you can serve others.

At Wipfli, you'll find:

- 130+ partners and professional staff 100% devoted to nonprofit and government organizations
- 85+ years of industry experience and knowledge
- A dynamic line of training, audit and consulting services
- Trusted and innovative strategies to help clients be responsible stewards of funds
- Lifelong learners who are current with industry trends and ongoing issues
- Our passion for working with you

For more information on Wipfli, please visit us at wipfli.com/nonprofits.

Nonprofit

2,400+ clients

- Professional and trade associations
- Federally funded entities
- Community-based organizations
- Foundations

Government

430+ clients

- Municipalities and other units of government

Education

380+ clients

- School districts
- Post-secondary institutions
- Private schools

Nonprofit, government and education 2022 client experience survey results

94% "Wipfli understands my business needs."

94% "Wipfli shows respect for our relationship."

91% "Wipfli takes the time to listen and learn."

And 93% are likely to continue doing business with Wipfli.

Client testimonials

"The Wipfli staff we've worked with have been very supportive and helpful."

"I think Wipfli is an excellent company and I appreciate their partnership."

Digital

IT health check

Wipfli's specialists can help you reinvent and manage processes related to technology, finances, operations, employees and customers.

Our technology health check can help your organization:

- Achieve organizational goals with better alignment of technology

- Improve effectiveness of technology function by leveraging a technology roadmap
- Access domain expertise and industry best practices

Health check options	Standard	Select	Premier
Organizational health check			
High-level organizational review	■	■	■
Prioritized improvement recommendations	■	■	■
SWOT analysis		■	■
Organizational chart/role analysis			■
Technology health check			
High-level review of technology	■	■	■
Technology roadmap	■	■	■
Gap analysis	■	■	■
Prioritized improvement recommendations	■	■	■
Investment forecast		■	■
End-user surveys		■	■
Network discovery report		■	■
Process review			■
Expanded interview audience			■
Formal presentation of findings			■

IT performance improvement services

Partner with Wipfli and get the highest-quality technology consultants in the business.

Not only will we become a part of your team and help meet your organization's goals, we'll likely save you money too. Get the technology service you deserve at a predictable, monthly cost that works for your budget.

Services include:

- Technology planning and budgeting
- Monitoring and maintenance of your infrastructure

- Off-site data backup and disaster recovery capabilities
- 24/7/365 support through the Wipfli service center
- Client portal, dashboard and technology training opportunities
- Information security review and scheduled testing plan

Learn more at wipfli.com/nonprofittech or email us at wipfliinfo@wipfli.com to get started.



CIO advisory services

Demystify technology strategy and execution for CEOs, CFOs, CIOs and CTOs with our advisory services that will:

- Empower the overall strategic plan with technical execution
- Provide benchmarks against industry standards
- Set strategies for successful management of infrastructure
- Guide application paths and roadmaps
- Lead innovation efforts to enable organizations to pivot and adapt

- Leverage industry best practices
- Manage vendor relations, negotiations and escalations
- Lead and staff key projects as needed
- Educate on important trends in the industry

Learn more at wipfli.com/CIOadvisory or email us at wipfliinfo@wipfli.com to get started.

wipfli.com/industries/nonprofits/form-sample-rfps-for-nonprofits

Constituent experience solutions

Wipfli brings integrated relationship management to nonprofit organizations. Our industry expertise allows us to focus on key issues and trends, which include:

- Client, member or volunteer engagement and outreach
- Reporting on outcomes
- Centralized intake
- Consolidated client data

- Effectively onboard new leaders
- Gather volunteer availability and schedule resources
- Scale to support new locations and programs
- Open API to connect to core systems

Learn more at wipfli.com/CRM or email us at wipfliinfo@wipfli.com to get started.

Our solutions are built to:

- Analyze interactions across constituent relationships
- Easily manage inquiry and intake processes
- Communicate across programs with referrals and a shared knowledge base
- Generate awareness and manage fundraising
- Engage your constituents with portals and self-service
- Manage programs and services
- Plan and execute events
- Track social case interactions and history

CRM Solutions

Microsoft Dynamics 365 Sales

Microsoft Dynamics 365 Customer Insights

Salesforce consulting services

Salesforce products

Technology deployment

Accelerate your technology projects with advice, ideas and implementation from industry specialists.

Our teams develop and install the technology solutions you need, including:

- Network infrastructure
- Wireless networking and security
- Virtualized and cloud-based servers
- Office 365 implementation

- Email and server migrations
- Collaboration platforms
- Mobile device management

Learn more at wipfli.com/ITSolutions or email us at wipfliinfo@wipfli.com to get started.

Business intelligence

You can unlock the true potential of stored data with Power BI.

Power BI can harness multiple silos of disparate data and create a single view of reliable information to measure outcomes across multiple programs, evaluate progress on strategic goals, improve processes and drive smarter decisions.

Learn more at wipfli.com/BISolutions or email us at wipfliinfo@wipfli.com to get started.

Cybersecurity

Taking a proactive approach to security management is every nonprofit organization's obligation.

Our security professionals have the extensive experience in bringing practical solutions and real-world perspective to cybersecurity that you need to help keep your information safe.

Working with us, you'll benefit from:

- A seasoned network of security engineers
- 24/7 access to our team
- Customized, easy-to-read reports

- Actionable recommendations
- Tests tailored to the unique risk and control environment of your business

Learn more at wipfli.com/nonprofitcybersecurity or email us at wipfliinfo@wipfli.com to get started.



Wipfli offers the following packaged services to meet your security needs:

Service	Frequency	Package		
		Silver	Gold	Platinum
Perimeter vulnerability assessment from the perspective of an outside attacker.	Annual	■	■	■
Cybersecurity rapid assessment with custom surveys and interviews to get a snapshot of your overall security.	Annual	■	■	■
Internal vulnerability scan roots out configuration issues and weak policies and passwords.	Annual	■	■	■
Perimeter scans identify vulnerabilities with out-of-date software and misconfigured systems.	Monthly		■	■
Perimeter configuration review provides a deep dive into essential network devices such as firewalls, switches and routers.	Annual		■	■
Email phishing test examines your employees' awareness of and compliance with your security policies.	Annual		■	■
NIST cybersecurity assessment evaluates your maturity levels for the U.S. Dept. of Commerce's five key domains of cybersecurity.	Annual			■
Incident response and handling includes a dedicated email and phone number to reach us 24/7.	Annual			■
Comprehensive vulnerability analysis prioritizes gaps in your technical, physical and administrative controls.	Annual			■
Security briefings each quarter cover new trends and threats, plus give you a chance to ask questions.	Quarterly			■

Compliance

Audit services

You need an audit that is more than a sheet of numbers.

We understand, and every day we help our clients face increasingly strict regulatory compliance issues, increased emphasis on transparency and accountability and limited resources.

Audit services include:

- Financial statement audits
- Single audits
- Program-specific audits
- Financial statement reviews and compilations

Form 990

The IRS Form 990 can be intimidating. It's challenging to gather information, prepare the form and review it — while making sure it puts your organization's best foot forward.

Our team can help to ensure your 990:

- Is updated with the most recent changes
- Answers all applicable questions in an impactful manner
- Reports independent contractors correctly
- Lists the correct employees, including their classification
- Reports compensation correctly

- Employee benefit plan audits
- Agreed-upon procedures
- Regulatory filings
- Projections and forecasts
- Tax compliance
- Form 990 preparation

Find your next auditor with ease. Download a free sample RFP online at wipfli.com/rfp.

- Has the applicable attachments
- Is filed electronically, including time frames
- Properly reports unrelated business income

And last — but not least — you need to understand how to safeguard your tax-exempt status, including knowing what activities should be avoided. Let us help you. Wipfli offers IRS Form 990 training and preparatory services to help your organization remain compliant.

Email us at wipfliinfo@wipfli.com to learn more.

Human capital management

Creating — and keeping — a roster of high-performing, passionate people is far from simple. Time, training and technology all play a role in cultivating a qualified workforce but are difficult to balance against stringent regulations and budgetary requirements.

You don't have to go it alone. Our specialists will help you develop a full-service human capital program that ensures employee engagement, gives you competitive leverage and allows you to focus on what you do best — pursuing your mission.

Our services include:

- Recruiting
- Onboarding
- Payroll management and compliance
- Navigating employee benefits

Learn more at wipfli.com/hcm or email us at wipfliinfo@wipfli.com to get started.

Employee benefit services

Staying one step ahead of the myriad of ever-changing employee benefit laws is a challenge.

That's why, every day, we help our clients with their day-to-day responsibilities and long-term planning related to their employee benefits.

Our services include:

- Retirement plan assessment
- Recordkeeping and third-party administration (TPA) services for 403(b), 457(b) and 401(k) retirement plans

- Investment advisory services
- Preparation of Form 5500 for retirement and welfare plans
- Retirement and welfare plan design consulting and plan documents
- Cafeteria plan document and administration services
- Affordable Care Act consulting and compliance services

Learn more at wipfli.com/employeebenefits.

Risk management

Occupational fraud threatens the vitality and survival of every organization, including yours.

Our team works with yours to ensure your fraud prevention remains vigilant to identify and mitigate threats and risks before they occur.

We provide:

- Internal controls review and assessment during all financial audits
- Review and implementation of appropriate antifraud practices, systems, policies and controls
- Training of board members, senior management, department heads and supervisors

Email us at wipfliinfo@wipfli.com to learn more.

“We need to make an investment and make sure that we’ve got the right partners. Microsoft made the investment. Team Rubicon made the investment. And it all pointed toward Wipfli. They were able to bring the expertise we needed.”

- Art delaCruz
CEO
Team Rubicon

My Wipfli membership service

Our My Wipfli team is ready to help you understand the regulations, work through your human resource challenges and get your leadership questions answered.

With access 24/7 in My Wipfli, you can get the support you need when it's convenient for you.

Join now for:

Answers: Get your questions answered with our guidance regulations library, or send us an email and we will research them for you.

Templates: Access customizable policies and procedures updated with the Uniform Guidance in the areas of finance, human resources and technology.

Team access: The membership includes access for you and your leadership team for one flat fee.

Learn more about all the ways we can help your organization online at wipfli.com/mywipfli.

My Wipfli Team



My Wipfli members can get answers on:

- Regulations
- Policies and procedures
- Internal controls
- Human resources
- Head Start/Early Head Start
- Community Action
- Technology
- Leadership
- And more

Financial optimization

Financial systems

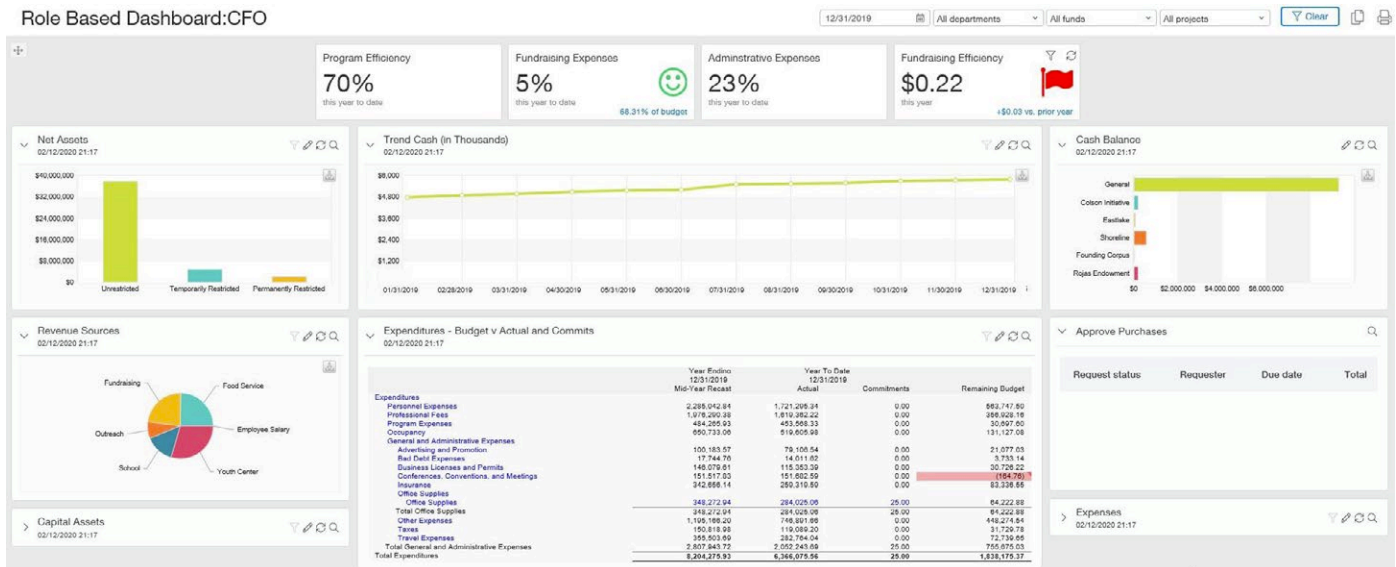
Our team crafts and implements accounting systems that offer:

- Easy-to-use interfaces
- Dashboards that empower you by giving you insight into the data you need, whenever you need it
- Simplified and/or automated workflows that replace manual processes, especially related to accounts payable
- On-demand training

We bring industry knowledge and best practices to help you evaluate your needs, select systems and implement sustainable solutions.

As a reseller of Sage Intacct – a best-in-class cloud accounting platform built to meet the needs of nonprofits – we have teams that can implement, maintain, train and support you in achieving the unique goals of your organization.

Learn more at wipfli.com/FinancialSolutions or email us at wipfliinfo@wipfli.com to get started.



"Thank you again for all the innovations you make to help us do our work more effectively and efficiently."

- Martha Velasco, Program Coordinator EHS
DDI VANTAGE

Accounting outsourcing

From day-to-day bookkeeping to complex analysis, let Wipfli help you meet your accounting needs with client-focused, outsourced financial services.

Our comprehensive accounting services are complemented by sophisticated yet easy-to-use web-based tools so you have access to your financial information – anytime, anywhere.

Our team can provide you with:

- Processing and payment of vendor bills
- Preparation and mailing of customer invoices
- Cash management support through the use of projected cash flow tools

CFO outsourcing

Our experts fill in as the CFO and work with management to ensure proper oversight of your overall financial structure and systems.

Wipfli will provide you with the core competencies an ideal CFO should have and will ensure there are appropriate strategies in place for:

- Financial strategic planning
- Cash flow planning

Fiscal policies and procedures

How do you ensure your policies and procedures meet the most current regulations, guidelines and best practices?

Turn to our experienced team, who can evaluate your policies and procedures to ensure they provide effective internal controls, are efficient and are in compliance with federal regulations.

Learn more at wipfli.com/nonprofitconsulting
or
email us at wipfliinfo@wipfli.com to get started.

- Preparation of sales and use tax returns
- Fixed asset maintenance
- Reconciliation of bank and credit card accounts
- Preparation of financial reports
- Annual 1099 reporting
- Analysis of financial results
- Proactive advice

Learn more at wipfli.com/FAO or
email us at wipfliinfo@wipfli.com to get started.

- Key metric benchmarking and trend analysis
- Management of your banking and financial relationships

Email us at wipfliinfo@wipfli.com to learn more.

Vision and strategy

Strategy

There's no one-size-fits-all approach when it comes to strategic planning.

At Wipfli, you won't get a standard, out-of-the-box solution. We provide value-added, custom strategies specific to our clients.

Our strategic advisors can work with you on all facets of strategic planning, providing detailed comparisons and quantitative benchmarks to meet your specific needs.

Our services include:

- Strategic planning
- Fact finding
- Conference calls with chief executive officer and/or committee
- Facilitation of on-site strategic planning meeting
- Development of strategic action plan
- Support to implement and track your progress

Learn more at wipfli.com/nonprofitconsulting or email us at wipfliinfo@wipfli.com to get started.

Operations

Our team works with you to achieve sustainable results by aligning performance, revenue, profits, customers, team members, service and productivity.

Our services include:

- Lean Six Sigma discovery event
- Operational process improvement
- Process redesign workshops
- Value stream mapping

- Root-cause analysis workshops
- Process regulatory/standards review
- Guided software selection
- Financial process review

Learn more at wipfli.com/nonprofitconsulting or email us at wipfliinfo@wipfli.com to get started.



Talent planning and development

Talent

Our professional teams take pride in delivering innovative yet practical solutions aligned with your organization's overall business strategy and objectives.

We provide strategic human resources services to help you hire, develop, manage, reward and retain employees.

Services include:

- Salary structure assessment
- Strategic human resources review
- Organizational structure design and role alignment
- Talent assessment
- Compensation systems
 - ▶ Base
 - ▶ Annual incentive
 - ▶ Executive
- Recruitment and selection
- Succession management
- Behavioral assessment

Change

When the stakes are high and return on investment is nonnegotiable, change leadership is essential in your organization.

Wipfli's proven Prosci®-based change management methodology and experienced change consultants help ensure critical ideas and strategies are adopted, impactful and sustainable.

We collaborate with you to navigate a successful path to achieving your organization's goals using:

- Change management services
- Champion and sponsor coaching
- Leadership and management training
- Theory of change and logic modeling

Learn more at wipfli.com/nonprofitconsulting or email us at wipfliinfo@wipfli.com to get started.

- Change readiness and strategy
- Culture and climate assessments

Training

You want to invest in your staff and provide them the training they need to achieve their goals. That's why we provide flexible, affordable, quality training on more than 120 topics:



Online/live webinars

Your organization gets customized training (just for you) over the web in areas you choose, such as best practices, regulations, compliance and hot topics. Even better, it's at your location and on your schedule.



On demand

In today's fast-paced world, you need training when it's convenient for you. Wipfli offers our most popular recorded training topics for you to view when it works for you. Watch in short segments or all at once — it's your choice.



Head Start/Early Head Start Eligibility, Recruitment, Selection, Enrollment, Attendance (aka ERSEA) Training Series

Everyone working in a Head Start/Early Head Start program must follow a specific set of requirements in identifying, recruiting and selecting those children and families with the most need in their communities. There are also specific guidelines for attendance and enrollment. During these 16 micro-webinar recordings (ranging from 3-16 minutes), keep your existing and new staff up to date with the regulations. The webinars are great for governing bodies and policy council members too!



Training series

Get your organization and board the training they need with two valuable training series, which are available on demand or on DVDs.:

- Board governance training series
- HS/EHS in-kind training: Are you making the match?



Conferences

Attend our annual Stronger to Serve national training conference to learn from us and collaborate with each other.



On site

Sometimes you prefer to attend training in person. Some topics are so important that everyone in your organization needs to hear them, or at least your leadership team should. That's why we offer our on-site trainings covering fundamental topics like Uniform Guidance and HS/EHS regulations.

Get more information or register for an upcoming training online at wipfli.com/events#Nonprofits.

Perspective changes everything

Wipfli brings the curiosity needed to uncover what's been overlooked. Our ingenuity helps create unexpected results. Our team of more than 3,000 associates works together to bring integrated solutions to turn data into insights, to optimize workflows, to increase margins and to transform through digital innovation. Others see problems. We see possibilities.

Connect with us:

888 876 4992

wipfli.com/nonprofits

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