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Karen Lynch Harley, Secretary
Rev. Micheal Richardson, Treasurer
Karen Franco
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Shalene Kanseah
Tribal Administrator

REQUEST FOR PROPOSAL (RFP)
TRIBAL STRATEGIC PLAN
Second Notice
BID NUMBER 2402201-A

PURPOSE: This RFP provides prospective respondents with sufficient information to enable them to prepare and submit proposals for consideration.

SCOPE: This RFP contains the instructions governing the proposal to be submitted and the material to be included therein; mandatory requirements which must be met to be eligible for consideration; and other requirements to be met by each proposal.

SCHEDULE OF ACTIVITIES DEADLINE

<u>1. Public Advertisement</u>	August 15, 2024
<u>2. Prospective respondent's written question deadline (no questions accepted after this date)</u>	August 29, 2024
<u>3. Responses to questions</u>	September 5, 2024
<u>4. Due date for proposals (5:00 p.m.)</u>	September 16, 2024
<u>5. Opening of proposals and evaluation by Review Team</u>	September 18, 2024
<u>6. Award date for contract</u>	September 24, 2024

INQUIRIES: Prospective respondents shall make written questions concerning this RFP to obtain clarification of requirements through Email: Shalene Kanseah, Tribal Administrator at (252) 248-3747 and/or skanseah@haliwa-saponi.org. No inquiries will be accepted after the inquiry deadline listed above.

PROPOSAL SUBMISSION: Proposal must be received on/before 5:00 p.m., September 16, 2024. Respondents who are mailing their proposals should allow sufficient time for mail delivery to ensure receipt by the time specified. No electronic submittals. Late proposals will not be accepted. Four (4) sets of proposals are required.

COST PROPOSAL: Cost proposals shall be **sealed separately**. Only when the bidders have met the minimum qualifications will the cost proposals be opened. If the bidder fails to submit cost separately from proposal, the package will be deemed non-responsive and disqualified.

REJECTION OF PROPOSALS: The Haliwa-Saponi Indian Tribe (HSIT) reserves the right to reject any and all proposals. This RFP may be canceled at any time and all proposals may be rejected in whole or in part when the HSIT determines it is in the best interest of the Tribe. All material submitted regarding this RFP shall become the property of the HSIT and will not be returned to the bidder.

EVALUATION PROCEDURES AND CRITERIA

1. An evaluation team will judge the proposals received in accordance with the general criteria used herein. Each bidder should be prepared to provide any additional information the team feels necessary for the fair evaluation of proposals.
2. Failure of a bidder to provide any information requested in the RFP may result in disqualification of the proposal. All proposals must be endorsed with the signature of a responsible official having the authority to bind the bidder to the execution of a contract.
3. The sole objective of the review team will be to select the bidder who is most responsive to the needs of the HSIT.
4. Evaluation Criteria: The following will be used to determine the selection process for the contract award.
 - a. Company Credential & qualifications in performing services0-10
 - b. Professional Resume/description of qualifications or relevant experience & knowledge0-15
 - c. Responsiveness to Scope of Work0-25
 - d. List of similar services provided to other clients in the last five (5) years0-10
 - e. Registered Sam.gov Contractor0-10
 - f. Haliwa-Saponi owned vendor0-10
 - g. Tribal owned vendor0-10
 - h. Minority owned vendor.....0-10
 - i. Woman owned vendor0-10

POSSIBLE TOTAL: 110*

*Vendor must obtain a minimum score of 80 points to qualify for opening of cost proposal. Otherwise, the bidder is disqualified.

- h. Delivery of all services at a reasonable cost0-30

SCOPE OF WORK: Proposals for the requested Strategic Planning Services should include but are not limited to: The Consultant will collaborate with the Tribal Council to finalize the Tribe’s Vision and Mission statements. This will primarily occur in-person and electronic communication. The Tribe anticipates the planning process will take several months with the Tribal Council, administration, and key stakeholders. The Consultant will facilitate the development of performance metrics and key indicators and outcomes that serve as performance measurements. The Consultant will assist the Tribal Council in defining the over-arching goals and priorities for the Council and the Tribe. The Consultant will collaborate with the Tribal Council, including smaller Council Committees, Tribal Administrator, and Department Directors on setting and achieving priorities, as required by specific funding sources and in accordance with the newly created Tribal mission, vision, goals, and priorities. It is anticipated that this work will occur through a combination of in person and electronic communications, such as through email and zoom. The Consultant will produce and deliver with a presentation to the Tribal Council a written Strategic Plan document that presents the

planning process, research, analyses, opportunities and strategies, and an implementation plan that will guide the Tribe for the next three to five years.

The Consultant will assist the Tribe to form a Project Team (“Team”) to guide project direction and oversee project activities. The Consultant will collaborate with the Team on the planning process, validate the Tribes project objectives, and outline management, staff, and consultant roles. The Consultant will develop a work plan to guide project activities. The Consultant will provide necessary presentations to the Tribal Council and Team on the final Strategic Plan.

The Consultant will collaborate with the Tribe to identify strengths, weaknesses, opportunities, and threats (SWOT) of the organization. The Consultant will facilitate a process to keep Tribal Members engaged to retain connection between the Tribe and its Members during the Strategic Plan period. The Consultant will propose recommendations to relevant policies, procedures, and administrative guidelines that promote and empower the overall vision, mission, and goals of the Tribe. *Include proposed land use along with final report.

Proposal Content and Requirements:

Proposal Format: Proposals should be organized according to the following outline:

1. Labeling and Table of Contents

The proposal will have appropriate labels and headings, with page numbers, for all documents. The proposal may include a table of contents that corresponds to the proposal page numbers.

2. Introduction

The proposal will include a brief introduction, which includes:

- a. The proposer’s name and address.
- b. Statement that the proposal is valid for at least 90 days from the proposal submission deadline.
- c. Statement that indicates the proposer’s willingness to perform the services described in this RFP and demonstrates the proposer’s qualifications to perform the full scope of work.
- d. Provide a detailed and precise discussion of services and positions being offered.
- e. Examples of relevant experience and strategic planning work successfully completed.
- f. Statement demonstrating that the personnel and other resources are required to perform the services described in this RFP will be qualified and available over the anticipated contract life.
- g. Statement that the signatory has authority to bind the proposer; and
- h. Signature of authorized individual.

3. Firm Profile The proposer shall provide the firm’s organizational structure, chain of supervision, and lead for the project. Include, both the respondent firm and any sub-consultant firms/subcontractors. Indicate whether the firm is licensed to conduct business in North Carolina or will obtain an North Carolina business license if selected. Copies of the current Business License shall be provided.

4. Professional Qualifications Proposal must include professional qualifications and resume of the firm’s proposed Project Lead, other key personnel, and/or team members necessary for satisfactory performance of required services.

5. Past Performance and References Please provide a description of examples of the firm’s three recent past successful strategic planning efforts, and at least three (3) references for individuals and/or organizations for whom you have provided services to. Please include reference contact names, phone numbers and email addresses.

6. Price Proposal Provide a detailed timeline, hourly fee, and total budget. This includes a detailed breakdown of the rates for each of the services and a realistic statement of estimated costs, including travel.

****Native American Contracting Preference***

The Tribe shall give preference to qualified Native American owned organizations. Proposals shall include a statement agreeing to provide preference in subcontracting, training, and employment. Proposers must provide documentation of Native American ownership, if claiming eligibility for preference.

-Any other evidence of Indian participation in the administration and technical development of the project.