



MONTANA CONSORTIUM FOR URBAN INDIAN HEALTH (MCUIH) IS SEEKING QUALIFIED PROFESSIONAL SERVICES TO DEVELOP A STRATEGIC PLAN.

Total Budget: \$15,000

Projected Start Date: June 1, 2023

Projected End Date: December 1, 2023

RFP Due Date: Friday, May 12 at 5:00 PM MST

Jason Smith, Executive Director

jsmith@nadc-nabn.org

Lisa James, Project Director

ljames@nadc-nabn.org

7 West 6th Ave.,
Suite 4-E Helena,
MT 59601 406-457-5535

REQUEST FOR PROPOSAL (RFP)

SECTION 1 – GENERAL INFORMATION

1.1 Purpose

Montana Consortium for Urban Indian Health (MCUIH) is soliciting quotes from qualified consultants for the development of a five-year strategic plan that will guide the organization's priorities and investments. The selected consultant will provide support to the MCUIH leadership team and its Board of Directors. The strategic planning process is estimated to take six months, beginning on June 1, 2023, and ending on December 1, 2023, and the quote is inclusive of all work, including the completion of a written plan detailing goals, strategies, priorities, and performance measures.

1.2 General Submission Information

MCUIH intends to award a single contract for professional services in an amount not to exceed \$15,000, including travel. Qualified individuals must have the knowledge and capacity to deliver the Scope of Work in its entirety.

1.3 Questions

Written questions regarding this proposal shall be submitted to:

Lisa James, Project Director
ljames@nadc-nabn.org

Deadline for questions: May 10, 2023, at 5:00 pm MST.

1.4 Intent to Propose

Prospective Consultants are not required to submit an e-mail notice of *Intent to Propose*, however, MCUIH will distribute submitted questions and answers to prospective Consultants who make a proposal declaration on or before May 8, 2023, at 5:00 pm MST.

1.5 Preparation Costs

MCUIH shall not be responsible for proposal preparation costs, nor for costs including attorney fees associated with any (administrative, judicial, or otherwise) challenge to the determination of the highest-ranked Proposer and/or award of contract and/or rejection of the proposal. By submitting a proposal each Proposer agrees to be bound in this respect and waives all claims to such costs and fees.

SECTION 2 – RULES GOVERNING COMPETITION

2.1 Examination of Proposals

Proposers should carefully examine the entire RFP, any addenda thereto, and all related materials and data referenced in the RFP. Proposers should become fully aware of the nature of the work and the conditions likely to be encountered in performing the work.

2.2 Proposal Acceptance Period

Award of this proposal is anticipated to be announced within **fifteen (15) calendar days**, although all offers must be completed and irrevocable for **sixty (60) days** following the submission date. Notice to proceed will be given upon timely, successful contract negotiation between MCUIH and Consultant.

2.3 Proposal Format

Proposals are to be prepared in such a way as to provide a straightforward, concise delineation of the Proposer's capabilities to satisfy the requirements of this RFP. Emphasis should be placed on:

- Conformance to the RFP instructions
- Methodology and timeline utilized to complete Scope of Work
- Previous experience with Indian Country projects

2.4 Signature Requirements

All proposals must be signed. An officer or other agent of a corporate vendor, if authorized to sign Contracts on its behalf; a member of a partnership; the owner of a privately owned vendor; or other agent if properly authorized by a Power of Attorney or equivalent document may sign a proposal. The name and title of the individual(s) signing the proposal must be clearly shown immediately below the signature.

2.5 Proposal Submission

Electronic submission of the proposal must be received by MCUIH no later than **5:00 pm MST on Friday, May 12, 2023**. Proposals shall be delivered to:

Lisa James, MCUIH Project Director
ljames@nadc-nabn.org

2.6 News Releases

News releases pertaining to the award resulting from the RFP shall not be made without the prior written approval of MCUIH.

2.7 Disposition of Proposals

All materials submitted in response to this RFP become the property of MCUIH.

2.8 Modification/Withdrawal of Proposals

A respondent may withdraw a proposal at any time prior to the final submission date by sending written notification of its withdrawal, signed by an agent authorized to represent the agency. This notification shall be submitted as an email attachment. The respondent may thereafter submit a new or modified proposal prior to the final submission date. Modifications offered in any other manner, oral or written, will not be considered. A final proposal cannot be changed or withdrawn after the time designated for receipt, except for modifications requested by MCUIH after the date of receipt.

2.9 Oral Change/Interpretation

No oral change or interpretation of any provision contained in this RFP is valid. Written addenda will be issued when changes, clarifications, or amendments to proposal documents are deemed necessary by MCUIH.

2.10 Late Submissions

PROPOSALS NOT RECEIVED BY THE DATE AND TIME SPECIFIED IN THIS DOCUMENT WILL NOT BE CONSIDERED AND WILL BE DEEMED UNRESPONSIVE.

2.11 Rejection of Proposals

MCUIH reserves the right to reject any or all proposals if determined to be in the best interest of the organization.

SECTION 3 – SCOPE OF WORK

1.1. Overview:

The Montana Consortium for Urban Indian Health (MCUIH) is a non-profit organization created to improve the quality of health care provided to American Indians. The organization was founded in 2021 and currently has 5 member organizations across the state.

The consortium provides training and technical assistance for Urban Indian Organizations (UIOs), including guidance on how to implement culturally competent practices. MCUIH works with local communities to reduce barriers to care and increase access to health services.

MCUIH collaborates to educate and inform project partners, elected officials, government agencies, and other stakeholders on challenges and opportunities in the healthcare field impacting Urban Indian populations. MCUIH develops projects and programs to enhance MCUIH's capacity and efforts to assist the members in the delivery of services.

This strategic plan will guide MCUIH by defining our mission, vision, and plan. The strategic plan is necessary to determine the direction and sustainability of MCUIH as we move into the coming years and focus our efforts on ensuring that we are working towards our common goal of supporting UIOs in Montana.

1.2. Scope of Work:

Stage 1- Pre-planning

This stage requires the consultant to research and provide a written report on the following in preparation for the strategic planning session.

- Review of the organization's history and overall assessment through a business analysis followed by a gap analysis to evaluate opportunities and/or challenges.
- Conduct an environmental scan benchmarking MCUIH in alignment with other Urban Indian organizations with a similar focus, regionally or nationally.
- Conduct an on-site organization assessment for each UIO.
 - Provide a detailed written report of assessment findings for each UIO.
- Interviews and surveys to receive input from stakeholders and board members (should also include but not be limited to current, past, and potential funders).
- Assess the current and future direction of the field.

Stage 2- Strategic Planning Creation

At this stage, the consultant helps MCUIH identify strategic goals and create an actionable strategic plan. The plan will include:

- An executive summary
- A comprehensive plan that identifies:

- Shared Mission and Vision.
- Proposed priorities, innovative strategies, synergistic approaches, etc.
- SMART (specific, measurable, achievable, realistic, and time-limited) Goals.
- Opportunities for including staff, leadership, and the Board (e.g., staff retreats, Board retreat, leadership strategic planning meetings, etc.).
- Objectives and tactics.
- Early action items demonstrate progress and create momentum and buy-in.
- Listing of responsible parties & roles.
- Metrics and measurable outcomes.
- Resource Development strategies.
- Recommendations for enhancement of current financial, technological, and human capital.
- A fundraising plan (including but not limited to a mix of potential donors, grants, corporate sponsorships, and other sources).
- Communication strategies.
- Sustainability strategies.

Stage 3- Implementation & Evaluation follow-up

This stage will be an optional addendum to the original contract.

This stage will require the consultant to assist the nonprofit by providing oversight of the implementation & evaluation process. This process should include:

- Follow-up sessions with MCUIH leadership to gauge the progress of the implementation at 3 and 6-month points after plan delivery.
- Continued identification of early action items.
- Review of metrics to determine the effectiveness of implementation.

1.3. Project Schedule:

Activity	Date
Release of RFP	April 17, 2023
Submission Due	May 12, 2023
Project Awarded	May 29, 2023
Project Activities Occur	June 1, 2023 – Sept 1, 2023
Strategic Planning Session	TBD
Meet with Board for draft review	TBD
Delivery of strategic plan	December 01, 2023

SECTION 4 – PROPOSAL AND SUBMISSION REQUIREMENTS

To achieve a uniform review process and obtain the maximum degree of comparability, the proposals shall be organized in the manner specified below. Proposals shall not exceed nine (9) pages in length (excluding resumes, attachments, or dividers). Information in excess of those allowed will not be evaluated/scored. One page shall be interpreted as one side of single-spaced, typed, 8½" X 11" sheet of paper.

4.1 Cover Letter (Limited to 2 Pages)

- A.** Identify the RFP project for which the proposal has been prepared.
- B.** Briefly state your understanding of the services to be performed and make a positive commitment to provide the services as specified.
- C.** Provide the name(s) of the person(s) authorized to make representations for your firm, their titles, address, and telephone numbers.
- D.** The cover letter must be signed by a corporate officer or another individual who has the authority to bind the agreement. The name and title of the individual(s) signing the proposal must be clearly shown immediately below the signature.

4.2 Proposal Narrative (Limited to 7 Total Pages)

A. Firms Experience (0-25 Points)

- 1. Detail the firm's comprehensive planning knowledge and experience.
- 2. Detail the firm's experience with Native American consulting, project planning, project management, and/or project implementation.
- 3. Provide references for which the firm has provided the same or similar services. Include a point of contact, a current telephone number, and a brief description of the services provided.

B. Key Project Staff and subconsultants (0-25 Points)

Identify key project staff, and subconsultants expected to provide services on behalf of the firm, including their availability. Resumes should be included for each of the individuals and subconsultants referenced, which details their relevant experience. Performance on projects, especially Native American projects, should be noted.

C. Available Resources and Consultant Location (0-10 Points)

- 1. Provide information on personnel resources available to your firm, which indicates that you have access to the services necessary to perform the work in the time available and within the required standard.
- 2. Describe the firm's ability to meet in person with MCUIH program staff and each of the UIOs during the performance of the Contract.

D. Project Methodology and Approach (0-30 Points)

Work Plan: Detailed work plan, to include:

1. Major stages and milestones.
2. Specific activities to be conducted at each stage.
3. Timeline for the activities to be conducted at each stage.
4. List of milestones and deliverables tied to the activities to be conducted at each stage.

E. Project Budget

(0-10 Points)

Provide detailed information on the firm's budget allocation, by task.

ITEM DESCRIPTION	AMOUNT
Total:	

F. Total Possible Score (100 Points)

SECTION 5 – EVALUATION CRITERIA AND SELECTION PROCESS

5.1 Evaluation Criteria

Submittals will be evaluated in accordance with the following criteria:

A.	Firm Experience	0-25 Points
B.	Key Project Staff and Subconsultants	0-25 Points
C.	Available Resources and Consultant Location	0-10 Points
D.	Project Methodology and Approach	0-30 Points
E.	Project Budget	0-10 Points
	Maximum Score	100 Points

5.2 Qualitative Rating Factor

Firms will be ranked using the following qualitative rating factors for each RFP criterion:

1.0	Outstanding
0.8	Excellent
0.6	Good
0.4	Fair
0.2	Poor
0.0	Unsatisfactory

The rating factor for each criterion category will be multiplied against the points available to determine the total points for that category.

A committee of individuals will perform evaluation of the proposals. The committee will rank the proposals as submitted.

MCUIH reserves the right to award Contract(s) solely on the written proposal.

MCUIH also reserves the right to request oral interviews with the highest-ranked firms (short-list). The purpose of the interviews with the highest-ranking firms is to allow expansion upon the written responses. If interviews are conducted, a maximum of three firms will be short-listed. A second score sheet will be used to score those firms interviewed.

The final selection will be based on written proposals and oral interviews, if conducted. The same categories and point range will be used during the second evaluation as for the first. The highest-ranked Proposer, after the second scoring, if performed, will be invited to enter into contract negotiations with MCUIH for the purposes of Contract Award.

SECTION 6 – CONTRACT NEGOTIATION PROCESS

The highest-ranked Proposer may be invited to enter into Contract negotiations with MCUIH. If an agreement cannot be reached with the highest-ranked Proposer, MCUIH shall notify the Proposer and terminate negotiations. The second highest Proposer may be contacted for negotiations. This process may continue until successful negotiations are achieved. However, MCUIH reserves the right to terminate negotiations with any Proposer should it be in the organization's best interest. MCUIH reserves the right to reject any and all proposals submitted.