REQUEST FOR PROPOSALS
Strategic Planning Services
Proposals will be received until Friday, October 1, 2021  5:00 pm

This RFP is also available at our website www.klamathtribalhealth.org

Federal Contractor
Equal Opportunity Employer & Programs – Minorities/Women/Disabled/Veterans
Reasonable accommodations will be made upon request.

Request for Proposals
Strategic Planning Services
Klamath Tribal Health and Family Services (KTHFS) is seeking proposals from interested and qualified organizations and firms to provide Strategic Planning Services.

A. INTRODUCTION
Klamath Tribal Health & Family Services (KTHFS) is a department of The Klamath Tribes, a federally recognized sovereign Indian tribe located in South Central Oregon. KTHFS advances the overall mission of The Klamath Tribes, and the trust responsibilities of the United States government, by providing quality, comprehensive, patient-focused health care in a culturally sensitive manner while eliminating disparities and barriers to health.

B. GENERAL INFORMATION
KTHFS is seeking a consultant to define and facilitate a strategic planning process that will result in the development of an organizational - year plan as well as annual plans. The final plan will provide structure, organizational guidance and continuous development for future decision-making and the achievement of critical goals. The strategic planning process will be designed to activate the Leadership Team, staff and various stakeholders in (1) determining organizational priorities and related measures. (2) developing a comprehensive and effective five year strategic plan that builds upon organizational strengths and successes to support organizational growth and contribute to the prosperity of KTHFS; (3) establishing annual plans which identify, communicate and monitor progress of key priorities for each year to assist in the advancement of the strategic plan.
C. SCOPE OF WORK

Described below are the technical requirements for the material, product, or service to be procured, including the minimum essential characteristics and standards that it must meet to satisfy its intended use.

The Klamath Tribes would like to engage with an individual or firm who can productively implement a **Strategic Plan Work Session and five-year plan**. In order to accomplish the plan, there are several key capacities that the **Strategic Plan Vendor will need**:

a. Knowledge and/or familiarity with the services provided by Klamath Tribal Health & Family Services (KTHFS), Youth and Family Guidance Center.
c. Excellent technical writing skills.
d. Must meet stringent deadlines and work with numerous individuals.
e. Ability to plan, prioritize, and coordinate work in teams to meet timelines.
f. Research potential federal, state, local and foundation funding sources through various sites and methods.
g. Coordinate with Klamath Tribal Health and Family Services to ensure there is no duplication or supplanting of grants and services.
h. Prepare status reports and other documents as needed for completion of the work.

*Responses should demonstrate the ability to meet the requirements listed in C. Scope of Work, a-h above.*

The selected vendor will:

a. Review the quality, effectiveness and efficiency of services rendered to KTHFS registered patients (consider interviews, policy & procedure review, etc.)
b. Review the timeliness, comprehensiveness and correctness of services rendered
c. Identify core challenges, gaps in services, barriers and opportunities for improvement towards the delivery of quality of services
d. Make recommendations on strategies and best steps towards better quality of care (trainings, equipment etc.)
e. Develop and submit a comprehensive Strategic Plan based on the responses to the above.
f. Develop and submit annual operational plans based on the responses to the above.
The Klamath Tribes understand that most of the work may be done at the contractor’s place of business, but will require at least a two-three day work session with the leadership team in person to address any barriers or recommendations to this requirement.

The proposal must show the total cost for labor, travel, supplies, or other costs necessary to complete the project.

The selected vendor shall meet all deadlines set by KTHFS. To ensure these timelines are met, the selected vendor will need to work closely with the KTHFS General Manager and Administrative Officer. The vendor must be available from start of the project to completion.

The Vendor must understand that project information will be confidential in nature and the KTHFS, and their clients and patients privacy must be protected at all times during the project.

The vendor must be willing to enter into a Vendor Contract with KTHFS.

D. QUALITY INFORMATION

Klamath Tribal Health & Family Services (KTHFS) will award contracts to responsible prospective vendors who have the ability to perform successfully under the terms and conditions of the proposed contract. In determining the responsibility of a party, KTHFS will consider such matters as the party’s

- Integrity;
- Compliance with public policy;
- Record of past performance;
- Financial and technical resources

Required information needed in the response of this RFP

1. Must have minimum of five (5) years’ work experience in related field of Strategic Planning.
2. Must provide resume or job qualification papers showing 5 five successful/progressive years in the field.
3. Must provide 3 references for the last 2 relevant jobs completed (Name and number).
4. Must not be debarred or suspended from doing business with the federal, state and/or tribal governments.
Preferred or If Applicable
1. Provide Federal ID#, Social Security or TIN # and State Registry# or equivalent.
2. Provide certificate of insurance for general liability coverage. If selected, insurance must be provided during contract agreements.
3. Must provide proof to claim Indian preference (if applicable).
4. It is preferred that party is registered with the System for Award Management (sam.gov) (cage code is acceptable.)

E. EVALUATION FACTORS AND SCORING

1. Selection Procedures: KTHFS uses this formal advertisement for RFP’s to award to the most highly rated proposal subject to negotiation of fair and equitable compensation. All timely responses to this RFP will be considered. KTHFS reserves the right to reject any and all proposals based on documented reasons including determining any or all proposals to be non-responsive.

2. Method of Review: KTHFS and its authorized representatives will review all proposals received on time and may contact the party to request further information. KTHFS may accept any given RFP as submitted or may negotiate with the party to establish terms most advantageous to the Tribes. The decision of KTHFS shall be final and not subject to appeal.

3. Method of Scoring: All proposals received on time will be evaluated and scored as follows:
   a. (0-45 points) Technical Proposal Preparation and Requirements. The RFP must fully demonstrate ability to carry out each requirement listed in the Sections above.
   b. (0-30 points) Financial Proposal: Cost will be determined by formula method.
   c. (0-10 points) References: A record of integrity, judgment, performance and timeliness in the execution of previous jobs will garner higher points.
   d. Indian preference: At minimum 15% of the evaluation points shall be granted to parties who demonstrate entitlement to Indian Preference, which points shall not be available to non-Indian bidders when using Method #3 of the Klamath Tribes Procurement Policy.
e. In the case of duplicate proposals the earliest postmarked envelope will be considered for award unless otherwise advised in writing by the applicant that the later proposal is the appropriate one to review.

100 TOTAL POINTS POSSIBLE (without Indian Preference)

F. INSTRUCTIONS FOR SUBMITTING PROPOSALS

1. Return proposal in an envelope clearly marked according to the following instructions below. One original and three (3) copies must be submitted. Alternate proposals will not be accepted.

2. Proposals can be submitted in person, through US Postal Service, or by ground delivery to:
   Klamath Tribal Health & Family Services
   Attention: Rebecca Jackson, Executive Assistant
   3949 S. 6th St.
   Klamath Falls, OR 97603

3. Do not submit RFP by email or Fax.

4. On outside of sealed envelope write:
   “Strategic Plan RFP #KTHFS-2021-01”

For any questions on the proposal and requirements, please contact Kimberly Kent, Administrative Officer, at (541)882-1487 ext. 220, or email
kimberly.kent@klm.portland.ihs.gov
G. CLOSING/OPENING DATE AND TIME and METHOD OF SOLICITATION

1. Proposals will be opened **August 31, 2021, 8 am PST** at the KTHFS Administration office, 3949 S. 6th St., Klamath Falls, Oregon. If, at the time of the scheduled opening date, KTHFS Administration is closed due to uncontrolled events or administrative closures, RFP’s will be opened at 10 a.m. on the next normal business day.

2. Proposals will be accepted at the address above up to **October 1, 2021 at 5:00 pm PST**. All timely responses to this RFP will be considered. The Klamath Tribes - KTHFS reserve the right to reject any and all proposals including those proposals received after the closing date and time. If, at the time of the scheduled closing date, KTHFS Administration is closed due to uncontrolled events or administrative closures, RFP’s will be accepted until 4 p.m. on the next normal business day.

3. This RFP has been published by:

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H. INDIAN PREFERENCE

To the greatest extent feasible, preference in the award of contracts and subcontracts shall be given to Indian persons, organizations and Indian-owned economic enterprises.

1. Indian Preference is given to Indians and Indian-owned enterprises that provide proof of at least 51 percent ownership of the enterprise submitted on an Indian Enterprise Qualification Statement showing:
   - ownership, control, and interest;
   - certification by a tribe that bidder is an Indian;
   - evidence of stock ownership, structure, management, control, and financing affecting the Indian character of the enterprise;
   - provide evidence that the contractor has the technical, administrative, and financial capability to perform contract work of the size and type involved.
2. Preference and opportunities for training and employment in connection with the administration of these activities shall be given to Indian and Alaskan Natives.

I. PROVISIONS

1. All vendors must observe the Klamath Tribes’ Indian preference policy as set forth in the Klamath Tribes Procurement Policy.
2. The Klamath Tribes – Klamath Tribal Health & Family Services shall conduct all procurement transactions in a manner that provides fair and open competition.
3. The Klamath Tribes – Klamath Tribal Health & Family Services shall provide fair and equitable treatment for all persons or firms who are in the business of supplying goods and services.
4. The Klamath Tribes – Klamath Tribal Health & Family Services wish to assure that supplies, services, and construction are procured efficiently, effectively, and at the most favorable prices available.
5. The Klamath Tribes – Klamath Tribal Health & Family Services shall take reasonable affirmative steps to assure that DBE’s, WBE’s and MBE’s are used when possible but without infringing on Indian preference where Indian preference is applicable.
6. The Klamath Tribes – Klamath Tribal Health & Family Services shall not use federal grantor funds to do business with any entity who is disbarred in accordance with the Federal Government Disbarment list.
7. Request for Proposals may be terminated by KTHFS at any time for cause.
8. Each party submitting a proposal is certifying that he/she has not colluded with any other person, firm or corporation in regard to securing the services being solicited.
9. No employee, officer, or agent of the Klamath Tribes may solicit or accept gratuities, favors, or anything of monetary value from contractors, potential contractors, or parties to subcontractors.
10. Negotiation: Provisions not addressed by this solicitation will be negotiated with the professional once a selection has been made.
11. Agreement: The selected professional will enter into an enforceable agreement that fully conforms to the contracting provisions pursuant to 2 CFR. Copies of these requirements are available for review at the grantee’s offices.
RFP Mailing List *(For internal use only)*

Provide list of names/firms that were solicited

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