

Upper Columbia United Tribes (UCUT)

Request for Proposal, Strategic Planning Consultant

PURPOSE

The Upper Columbia United Tribes (UCUT) is seeking proposals to identify professionally qualified consultants to guide and execute a strategic planning process for the development of a five-year strategic plan with a one- to three-year action plan. The UCUT seeks consultants who demonstrate a strong overall understanding of the structure and purpose of nonprofit organizations, have strong facilitation skills, and have proven experience with nonprofit strategic planning.

ABOUT THE ORGANIZATION

Our Vision

The Upper Columbia United Tribes ensure a healthy future for the benefit of all by protecting and enhancing the traditional territorial lands of our ancestors. Through the collaboration of five area tribes, we take a proactive, collaborative, and science-based approach to promote fish, water, wildlife, diverse habitat, and Indian culture in the Northwest.

Our Mission

To unite Upper Columbia River Tribes for the protection, preservation, and enhancement of Treaty/Executive Order Rights, sovereignty, culture, fish, water, wildlife, habitat and other interests and issues of common concern in our respective territories through a structured process of cooperation and coordination for the benefit of all people.

PROJECT OVERVIEW

The UCUT is seeking an external Strategic Planning Consultant to work with our Commissioners, Executive Director, Senior Managers, and organization staff, in a deliberative and robust process over the next several months, to discuss and establish the organizations' strategic priorities and needs.

OBJECTIVES

1. Identify priorities of the member tribes and narrow them down to focal areas for the UCUT organization.
2. Establish an organizational plan for the UCUT organization.
3. Draft a strategic plan for the UCUT organization that includes:

- Develop concrete goals for the organization that are measurable, supported by resources, and consider perspectives of the member tribes.
- Define SMART objectives for the UCUT organization.
- Identify available resources and flag gaps needed to be filled to achieve organizational goals and objectives.
- Incorporate assessment mechanisms to allow the organization to adapt as needed.

SCOPE OF SERVICES & DELIVERABLES

We expect the project to include:

1. **Productive Collaboration:** Work closely with the Executive Director to develop specific details of the planning process, including the timeline, logistics, and deliverables. Collaborative conversations should include the opportunity to provide suggestions and feedback with respect to the content and structure of both member Tribe engagement and Commissioner and Manager planning sessions.
2. **Member Tribe Engagement:** Engage a diverse group of member Tribe representatives including Senior Managers, Committee Members, the UCUT Executive Director, and UCUT organization staff to inform the strategic planning process. Stakeholder engagement may consist of focused listening groups, one-on-one interviews, and surveys. Your proposal should describe how you will engage the member Tribes, the anticipated time an individual representative might have to commit, and how you will provide the results of the representatives input as part of the process.
3. **Preliminary results:** Draft strategic planning results should include affirmation, revision of vision and value statements as well as strategic goals, strategies/action steps, and key performance indicators.
4. **Commission Planning Session(s):** Consultants are expected to conduct one session to discuss and receive feedback on the results and next steps with the Commission, the Senior Managers, and additional staff. The target group for the Commission Planning Session, not to exceed 20 people, would include a diverse group of those engaged in our work. It is projected that this could be a one-day session which could be in person or virtual. Other sessions could also be virtual with a few additional targeted representatives.
5. **Final results:** A final strategic plan will be developed and submitted based on feedback received at the commission planning session.

PROJECT GOALS

UCUT envisions a scope of work where the consultant helps UCUT identify strategic goals and creates an actionable strategic plan, which might include:

- A.) Shared Mission, Vision, and Core Values
- B.) Objectives
- C.) Strategies
- D.) Tactics

- E.) Listing of responsible parties & roles
- F.) Results
- G.) Measurables
- H.) Resource development strategies
- I.) Communication strategies

PROPOSAL FORMAT

Please outline your approach to incorporate the priority areas and scope of work/services (provided in this document) in a proposal addressing the items below:

1. Your proposed approach to working with the UCUT members tribes and organization
2. The services you would provide, deliverables, an estimated timeline, and an associated budget
3. Resources and support needed from UCUT organization and tribal staff (including estimate of needed staff, Commission, Manager, and committee time, if appropriate)
4. Statement of qualifications
5. Two professional references specific to strategic planning

General information

The proposal should provide the name of the consultant, title, address, phone number, email address, and website, if one exists.

Consultant Qualifications & Roles

The proposal must describe the consultant's qualifications such as work activities, expertise, knowledge, and experience. Experience should include examples of related nonprofit or tribally connected work.

Some key qualifications that will be considered:

- 1.) Education (degree(s) and/or certificate(s))
- 2.) Experience in successfully developing strategic plans
- 3.) Knowledge of collective impact or collaborative strategic initiatives
- 4.) Strong facilitation experience
- 5.) Experience in creating a neutral environment for obtaining input
- 6.) Experience in gathering and utilizing data to drive the strategic process
- 7.) Ability to constructively challenge key stakeholders
- 8.) Experience in inspiring others to thinking innovatively
- 9.) Project management experience

Work Plan

The proposal should include a detailed description of the activities to be conducted by the consultant to complete the work.

- 1.) Specific activities to be conducted at each stage
- 2.) Sample timeline for the activity at each stage
- 3.) List of milestones & deliverables tied to the activities
- 4.) Proposed payment schedule tied to project milestones & deliverables

References

Information regarding each reference should include the individual's name, address, phone number and email address.

Previous Work Product

The proposal should include at least 1 sample of a previously completed strategic plan. Portions may be redacted to protect private information as needed.

OWNERSHIP AND CONFIDENTIALITY

All intellectual property will become the property of the UCUT organization. All data remains the sole property of the UCUT organization. The consultant shall agree to keep information related to this process in strict confidence, including, but not limited to, the terms of the contract and any confidential business information or proprietary information that has been gathered on this project.

PROCESS FOR PROPOSAL SUBMISSION AND EVALUATION

Closing Submission Date

Proposals are due by 5:00pm on Wednesday, March 16, 2022.

Inquiries

Inquiries concerning this RFP should be directed to lori@ucut.org.

Conditions of Proposal

All costs incurred in the preparation of a response to this RFP are the responsibility of the bidder and will not be reimbursed by UCUT.

Submission Instructions

Proposals should be submitted via e-mail to lori@ucut.org. Late or incomplete submissions will not be accepted. It is the responsibility of the bidder to ensure that the response is received by UCUT by the closing date and time. A response may be judged and excluded from further consideration if it is not received by the deadline or does not follow the format outlined above.

Right to Reject

UCUT has the right to reject all responses received in response to this RFP.

Confidentiality

If the bidder deems any material submitted to be proprietary or confidential, the bidder must indicate this in the relevant sections of the response.

Notification of Selection

It is expected that a bidder will be selected within two to three weeks of the closing submission date, although this timeline is subject to change. UCUT reserves the right to cancel the RFP at any time. Please note that due to the nature of the project, there may be a gap between a consultant being selected for the project and their start date.

Estimated Timeline

Notification of Finalists: March 21-25, 2022

Selections Made: April 1, 2022

Contract signed by both parties: April 7, 2022.

Project Begins: April 18, 2022

Delivery of Strategic Plan: September 1, 2022.

Criteria for Selection

UCUT will select the proposal based upon the one it feels will deliver the highest quality deliverable at the best value. Proposals will be initially reviewed by a selection committee designated by the ED.

Conflict of Interest

The bidder must disclose any possible conflicts of interest that may result from the award of this contract or services provided under this contract. Except as otherwise disclosed in the proposal, the bidder affirms that to the best of their knowledge there is no actual or potential conflict between the bidder, a bidder's team member working on the project or its family's business, or financial interests and the services provided under this contract. In the event there is a change in either interest or the services provided under the contract, the bidder will inform UCUT regarding the possible conflicts of interest, which may arise because of such a change and agrees that all conflicts shall be resolved to UCUT's satisfaction, or the bidder may be disqualified from consideration of this RFP.