

Southwest Tribal Housing Alliance (SWTHA) is seeking an experienced strategic planning consultant to facilitate a strategic planning process and help develop a new Three-Year Strategic Plan for SWTHA.

Introduction

Through this RFP, SWTHA seeks a qualified consultant who is experienced with working with nonprofits similar to SWTHA in size and scope in the facilitation of a strategic planning process and development of a three-year strategic plan. The consultant will work in partnership with SWTHA's Executive Committee, the SWTHA Board members, and the SWTHA Member Representatives to complete the scope of work at SWTHA's Triannual Meeting at Twin Arrows Resort in Flagstaff, Arizona on May 14-15, 2025.

The deadline to submit is Friday, April 25, 2025, by close of business Mountain Standard Time.

Background

Southwest Tribal Housing Alliance is a 501(c)(3) non-profit organization headquartered in Albuquerque, N.M. that envisions no matter where you live or who you are, you can enjoy living in a place that is healthy, prosperous, and resilient. It is our mission to be the voice for Tribal housing by providing relevant, timely information, resources and a valuable network for SWTHA. Our team of 10 Board Members works with various entities to empower Housing Authorities through technical assistance, advocacy, and thought leadership.

Our Members

Southwest Tribal Housing Alliance is comprised of the Indian Housing Authorities in Arizona, New Mexico, and West Texas. For 2025, SWTHA consists of 28 different Tribes. Our Board is 10 members with 4 being the Executive Committee.

Additional Information and Resources

<https://www.swtha.org/>

With those building blocks in place, we seek a consultant with significant experience working with similar non-profits who can help us create an agile, inspiring, and implementable Three-Year Strategic Plan.

RFP Purpose

Through this RFP, SWTHA seeks a qualified consultant who is experienced with working with nonprofits similar to SWTHA in size and scope in the facilitation of a strategic planning process and development of a strategic plan. The consultant will work in partnership with SWTHA's Executive Committee, the SWTHA Board members, and the SWTHA Member Representatives to complete the scope of work at SWTHA's Triannual meeting at Twin Arrows Resort in Flagstaff, Arizona on May 14 - 15, 2025.

Project Goals

We seek to create a strategic plan that leverages the building blocks we've already put in place to guide, clarify, and harmonize the work and focus of SWTHA over the next 3 years. The plan's goals should inspire SWTHA's staff and stakeholders, as well as provide a road map of activities that can be implemented to achieve those goals. We want the plan to be short enough to make it usable by

staff yet long enough to include narratives that inspire passion around our organizational direction. We'd also like a one-page version of the Plan for external posting, distribution, and easy consumption. Ultimately, think of the Plan as more of a compass than a turn-by-turn by GPS.

Scope of Work

With those Project Goals in mind, we desire a consultant to execute the following scope:

- **Project Prep-Work and Kickoff**
 - Review documents and resources identified by SWTHA, including our prior Strategic Plan, programmatic priorities, and other key organizational documents
 - Create and manage an overall project work plan in collaboration with SWTHA.
 - Lead kickoff meetings with SWTHA Board.
 - Lead kickoff Zoom calls with the SWTHA Board.
 - Introduction to Planning Process presentation at existing SWTHA monthly meeting.
- **Facilitate Targeted Board, Members, and Stakeholder Input**
 - Interview SWTHA Board Members and SWTHA members
 - Potentially interview 2-10 other key SWTHA Associate members.
 - Lead a ½ day convening with the SWTHA Board and SWTHA Members for input on initial Plan outline
 - Summarize the findings from the input above.
- **Lead in person the drafting and development of 3-Year Plan aligned at SWTHA's Triannual Meeting at Twin Arrows Resort in Flagstaff, Arizona, on May 14th and 15th 2025**
 - 3-5 Measurable and achievable strategic goals and objectives
 - Specific initiatives and activities designed to achieve the established goals and objectives
 - Key performance indicators used to assess whether success was achieved
 - Action steps to operationalize the plan, measure results and ensure accountability
 - Creating an overall initial high-level outline/framework of the Plan, preparing a draft full plan and then draft final plan, and facilitate the editing and feedback process
 - Create a one-page infographic-centric version of the final plan suitable for placement on SWTHA's website and distribution to its stakeholders
 - Participate in internal presentation of final Plan to SWTHA.

Timeline: We desire to have the final plan ready to present to SWTHA's Members by September 2025.

Submission Requirements

Section 1. Company Experience/Qualifications:

(Please limit this section to no more than two pages. Bios attached to the submission will not count against this page limit.)

1. Describe your firm's experience and capabilities vis-a-vis the Project Goals & Scope of Work above. A key consideration will be experience working with nonprofits similar to SWTHA in size and scope in the development of a plan.
2. Identify the name and title of the primary consultant who will lead the work and any other key team members who will be assigned to the project. For each, provide a summary of relevant experience/bio.
3. Describe what differentiates your firm from other firms which do similar strategic planning work.

Section 2. Approach:

Respondents should provide a detailed project plan and timeline that outlines key activities and deliverables with consultant and/or SWTHA responsibilities clearly defined. The plan should identify the lead consultant for the work, their title and role, and the name, title and role of each additional team member who will work on the project. The plan should also include initial planning meetings with SWTHA Board and a detailed plan for collaboration that points out any approaches to executing the work, approximate deliverables, and a completion schedule that aligns with SWTHA's timeline for final Board approval of the Plan outlined above.

Section 3. Price Proposal:

Provide a proposed fixed-fee budget and accompanying narrative or notes aligning with the Scope of Work and your proposed approach. In addition to the proposed fixed-fee budget, please provide name, title, and hourly rates (good for one year) for 1) the lead consultant and 2) each additional team member who would help execute the Scope of Work under the budget. Also in the proposed budget should be the cost of travel to attend the SWTHA Triannual meeting in Flagstaff, Arizona on May 14 -15, 2025. For the proposed contract actions the expected price should not exceed \$12,000.

Section 4. References:

Respondents should provide contact information for references as follows:

1. For the lead consultant, at least two (2) references, and for each additional team member, at least (1) one reference that can attest to the quality and effectiveness of their relevant work;
2. The contact information should include the contact name, phone number, email address, and website address.

Evaluation Criteria

SWTHA is seeking a diverse pool of consultant candidates. All proposals will be evaluated based upon:

- Experience/Qualifications (25%)
- Proposed Approach (40%)
- Price Proposal (25%)
- References (10%)

Submission Instructions

Consultants interested in providing the services described above should submit a cover letter and proposal by **Friday, April 25, 2025, by close of business Mountain Standard Time** in accordance with these instructions. The proposal must include the prescribed format and content in the Submission Requirements section.

Adherence to the proposal format by all proposers will ensure a fair evaluation of SWTHA's needs. Proposals that do not follow the prescribed format may be deemed non-responsive.

Proposals should must be submitted electronically to Jamie Navenma (jamien@lagunahousing.org) with "SWTHA Strategic Planning Consultant Proposal" in the subject line.

Applications received after the submission deadline will be rejected. SWTHA reserves the right to award under this RFP without interviews or further negotiations. Proposers are encouraged to offer

their best terms and prices with their original submission. SWTHA reserves the right in its sole discretion to reject any or all proposals, in whole or in part, without incurring cost or liability.

Selection Process and Timing

Proposals will be promptly reviewed after the proposal submission deadline. SWTHA may select proposers to do an interview/presentation of their proposal to SWTHA. If interview presentations are desired, the presentations will be via video conference at SWTHA's discretion. SWTHA will not compensate and/or reimburse any selected consultants for their labor and/or expenses related to the presentations. Although SWTHA reserves the right to forego interview presentations, if we decide to interview any proposers, those interview presentations are targeted to occur by video conference by May 2, 2025. We'd anticipate a final decision shortly after those interviews and a project kickoff before the end of the year.

General Conditions

Limitation

This solicitation does not commit SWTHA to award a contract, pay any costs incurred in preparing a proposal, or to procure or contract for services or supplies. SWTHA reserves the right to accept or reject any or all proposals received, negotiate with all qualified sources, or cancel in part or in its entirety the solicitation when it is in SWTHA's best interest.

Equal Opportunity

In connection with the procurement of the specified services, the firm warrants that it shall not discriminate because of race, color, religion, sex, national origin, political affiliation, non-disabling physical and mental disability, political status, matriculation, sexual orientation, gender identity or expression, genetic information, status as a veteran, physical handicap, age, marital status, or any other characteristic protected by law.