

**Request for Proposal (RFP)  
Consultant – TANF Research  
Klamath Tribes Social Services Department  
RFP # 18-01-KTSSDTANF**

**1.1 Introduction:**

The Klamath Tribes is seeking qualified consultants to develop and negotiate caseload and funding for service area/population expansion of the federally funding block grant, Tribal Temporary Assistance for Needy Families (TANF). The primary function of this RFP will consist of three phases and will be detailed in the Scope of Work.

The Consultant will be responsible to review the Klamath Tribes existing Tribal Family Assistance Plan and in compliance with Section 412 of the SSA PL 104-193, 45 CFR Part 286, OFA/ACF Program Instructions (PI), Policy Announcements and other relevant regulations, laws, and case studies to determine best strategy for program expansion.

Consultant will provide alternative eligibility criteria and associated relevant case estimates by utilizing, in part, Native American/Alaskan Native census demographic data and other data sources such as Indian Health Services, and Tribal census to prepare a feasibility plan to expand the Klamath Tribes TANF program; prepare a Letter of Intent; and assist in case number negotiations with State, Federal and the Klamath Tribes. Consultant will work independently in researching the TANF program but can expect to receive collaboration from the Social Services Department. Consultant will work with the Klamath Tribes Social Services Department on implementation strategies of the expanded TANF program.

**1.2 Background and Timeline:**

The Klamath Tribes TANF Program has been in existence since 1997 when a MOU between the Kamath Tribes and State of Oregon was implemented. Funding originally derived from 1994 information as outlined in 45 CFR Subpart B §286.20. The Klamath Tribes TANF Program receives annual funding from the federal government and the State of Oregon but funding has not increased since inception of the TANF Program (over 21 years). The Klamath Tribes submits a TANF Plan every three years and has a Plan submitted to start July 1, 2018. The mission is to assist its Klamath County Native American needy families to move toward and achieve self-sufficiency through gainful employment. According to the existing Plan, the TANF program will serve Klamath Tribal members who reside in Klamath County, Oregon and who meet the Tribes TANF program eligibility.

<b>Date</b>	<b>Schedule of Information</b>
<b>06/22/2018</b>	<b>Solicit RFP 18-01-KTSSDTANF</b>
<b>07/25/2016</b>	<b>Questions regarding RFP</b>
<b>08/01/2018</b>	<b>Closing date for RFP 18-01-KTSSDTANF 4 p.m.</b>
<b>08/02/2018</b>	<b>Opening of RFP 18-01-KTSSDTANF 1:30 p.m.</b>

**1.3 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 which it must meet to satisfy its intended use.

1.3.1 The Klamath Tribes would like to engage with an individual or firm who can productively research, coordinate, orchestrate, and produce a feasibility plan to assertively expand the Klamath Tribes TANF Program.

To accomplish an effective expansion plan, the consultant must be able to develop and negotiate caseload and funding for service area/population expansion of the federally funded block grant, Tribal Temporary Assistance for Needy Families (TANF). The Scope of Work shall include the use of Native American/Alaskan Native census demographic data using multiple data sources including Indian Health Services Clinics, Census Bureau and any other relevant data sources to obtain the most beneficial outcome for the Klamath Tribes Social Services Department, TANF Program.

It is anticipated the Plan will be developed in three (3) phases and there are several key capacities that the consultant must have and be able to address in the submitted RFP:

- a. Knowledge and/or familiarity of The Klamath Tribes, its mission, strategy, and structure/hierarchy.
- b. The Consultant must have extensive knowledge in TANF; Tribal TANF; Tribal TANF caseload; and funding methodology.
- c. Knowledge of data and statistical analysis principles.
- d. The Consultant must have experience in relationships/negotiations with Tribes, Federal and State agencies.
- e. Ability to research and gather information relating to TANF regulations and TANF programs in order to develop the Letter of Intent and Feasibility Plan.
- f. Ability to understand and execute complex instructions to define problems, collect data, establish facts, and draw valid conclusions. Experience in Statistical Analysis is a must.
- g. Effective research techniques and powerful negotiation skills.
- h. Knowledge of 45 CFR Part 286 and other regulations related to Temporary Assistance for Needy Families (TANF).
- i. Above average organizational skills to plan, prioritize, and coordinate the Caseload/Funding Feasibility Plan; Program Assessment /Program Development; Policy change and Implementation and execution.
- j. Consultant must have five (5) years' experience in working with statistics.

#### 1.3.2 Phase I. – Caseload Feasibility/Funding Project:

- Consultant will spend time on research and review of the Tribes current TFAP: 1) Federal Plan; and 2) State of Oregon Plan.
- Consultant may meet with the General Manager, Social Services Department Director, TANF Manager, TANF staff and Chief Finance Officer to obtain historical and current information on the TANF Plan and its inception.
- Consultant will review 45 CFR Part 286, Tribal laws and other regulations that relate to the TANF Plan.
- Specifically Consultant will review 45 CFR Subpart B, 286.20 and assist the Tribes in redefining “Indian Family” that will be negotiated in the TFAP amendment.
- Specifically Consultant will assist the Tribes in defining the “Eligible Population” that will be negotiated in the TANF Plan amendment.
- Specifically Consultant will assist the Tribes in defining eligible Households and what a Household encompasses.
- Consultant will develop a Letter of Intent that justifies expanding the TANF program and includes the new definitions of “Indian Family” and “Eligible Population”.
- Consultant will use appropriate Census' to include:
  - Klamath enrolled including those on the 1954 Roll;
  - Klamath descendants;
  - Other Indians from Federally recognized tribes living in Klamath County;

- Descendants of Federally recognized tribes;
- Other.

1.3.3 Phase II – Program Assessment/Program Development Project:

- If feasible, prepare a Letter of Intent based statistical analysis and information derived from Phase I.
- Prove that the 1994 census information is inaccurate and provide a report.
- Provide a Feasibility Report that includes all findings from Phase I above to use as a negotiation tool with the State of Oregon to redefine the TANF Plan.
- Assist the Tribes in negotiation efforts, including preparing and redefining the Caseload/Funding Feasibility Plan and taking the lead in negotiations.

1.3.4 Phase III – Implementation

- Assist the Tribes with implementation of the new Policy for TANF.
- Assist the Tribes in development of staffing, training and re-training plans.
- Amend the TFAP to include new “eligible population”, new definition of “family” and new “household”.
- Assist the Tribes in setting up new services.

1.3.5 The Klamath Tribes understand that most of the work can be done at the contractor’s place of business, but there may be times when the contractor must attend meetings by teleconference, Skype, or in person. Address any barriers or recommendations to this requirement.

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

1.3.7 Consultant must meet all deadlines in a timely manner.

1.3.8 The Consultant will abide by Klamath Tribes confidentiality requirements.

1.3.9 The Consultant must be respectful to the Klamath Tribes and their possessions and is encouraged to ask questions for clarification.

1.3.10 Questions regarding requirements of the project can be directed to Mr. George López, General Manager at [george.lopez@klamathtribes.com](mailto:george.lopez@klamathtribes.com). Questions must reach Mr. López no later than July 25, 2018.

**1.4. Quality Requirements:**

The Klamath Tribes Administration will award contracts to responsible prospective contractors who have the ability to perform successfully under the terms and conditions of the proposed contract. In determining the responsibility of a party, the Klamath Tribes Administration 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. At least five (5) years’ of direct and relevant TANF work experience, including statistical analysis.
2. Must provide resume or job qualification papers showing five (5) successful years in the field.
3. Must provide 3 references for the last 2 relevant jobs completed (Name, number/email).

4. Must not be debarred or suspended from doing business with the federal government.

Preferred or If Applicable for RFP

1. Strong written and negotiation skills will be a plus in selection.
2. Provide Federal ID#, Social Security or TIN # and State Registry# or equivalent.
3. Provide certificate of insurance for general liability coverage. If selected, insurance must be provided and maintained during contract administration.
4. If qualified, provide proof to claim Indian preference (Indian Enterprise Qualification Statement).
5. It is preferred that party is registered with the System for Award Management (sam.gov) (Cage Code is acceptable.)

**1.5. Evaluation Factors and Scoring:**

1. Selection Procedures: The Klamath Tribes' Administration 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. Klamath Tribes' Administration 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: The Klamath Tribes Administration and its authorized representatives will review all proposals received on time and may contact the party to request further information. The Klamath Tribes' Administration may accept any given RFP as submitted or may negotiate with the party to establish terms most advantageous to the Tribes. The decision of the Klamath Tribes Administration 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. (0-55 points) Proposal Preparation and Requirements. The RFP must fully demonstrate ability to carry out each requirement listed in the Sections above. Responder must detail experience and ability to carry out each question or requirement.
  - b. (0-35 points) Cost: Cost will be determined by formula method, if possible.
  - 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 reviewed 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)

**1.6. 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 (all can be printed on both sides of paper). Alternate proposals will not be accepted.

2. Proposals can be submitted in person, through US Postal Service, or by ground delivery to:

The Klamath Tribes  
Administration Office  
**Attention: Jackie Galbreath, Purchasing Agent**  
P.O. Box 436  
501 S. Chiloquin Blvd.  
Chiloquin, OR 97624

3. Do not submit RFP by email or Fax.

4. On outside of sealed envelope write:

**“Consultant – TANF Research RFP # 18-01-KTSSDTANF”**

For any questions on the proposal and requirements, please contact Jana DeGarmo, Grant and Contract Compliance Officer by email at [jana.degarmo@klamathtribes.com](mailto:jana.degarmo@klamathtribes.com).

**1.7. Closing/Opening Date and Time and Method of Solicitation:**

1. Proposals will be accepted at the address above up to **4 p.m. on 08/01/2018**. All timely responses to this RFP will be considered. The Klamath Tribes 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, The Klamath Tribes 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.
2. Proposals will be opened at **1:30 p.m. on 08/02/2018** at the Klamath Tribal Administration office, 501 S. Chiloquin Blvd., Chiloquin Oregon. The Klamath Tribes reserve the right to reject any and all proposals during opening that do not meet stated criteria. If, at the time of the scheduled closing date, The Klamath Tribes 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.
3. This RFP has been published by:

	Publication in a Newspaper of general circulation
<b>X</b>	Direct solicitation of proposals from an adequate number of known sources
<b>X</b>	klamathtribes.org

**1.8. Indian Preference:**

1. To the greatest extend feasible, preference and opportunities for training and employment shall be given to Indians, and preference in the award of contracts and subcontracts shall be given to Indian organizations and Indian-owned economic enterprises.  
Indian Preference is given to 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.

**1.9. Provisions:**

1. All contractors must observe the Klamath Tribes 'Indian preference policy as set forth in the Klamath Tribes Procurement Policy.
2. The Klamath Tribes shall conduct all procurement transactions in a manner that provides fair and open competition.
3. The Klamath Tribes 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 wish to assure that supplies, services, and construction are procured efficiently, effectively, and at the most favorable prices available.
5. The Klamath Tribes 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 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 The Klamath Tribes' Administration 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.