

Request for Proposals (RFP): 5-Year Comprehensive Strategic Plan

Entity: Catawba Indian Nation (“CIN”)

Release Date: January 29, 2026

Closing Date: February 27, 2026

1. Project Overview

CIN is seeking proposals from qualified consulting firms or individuals to facilitate the development of a 5-Year Comprehensive Strategic Plan. This plan will serve as the roadmap for CIN’s growth and focus on two critical pillars:

1. **Community Needs:** Improving the quality of life, health, and cultural preservation for tribal citizens.
2. **Organizational Needs:** Strengthening tribal government operations, departmental efficiency, and leadership-staff alignment.

2. Scope of Work

The selected consultant will be expected to guide CIN through a three-phase process:

Phase I: Discovery & Engagement (Community & Data)

- **Citizen Engagement:** Facilitate town halls, focus groups (Elders, Youth, Veterans), and digital surveys to identify community priorities.
- **SWOT Analysis:** Perform a comprehensive analysis of CIN’s Strengths, Weaknesses, Opportunities, and Threats.

Phase II: Strategy Development

- **Goal Setting:** Define 5-year goals for key areas including Economic Development, Health & Wellness, Education, Cultural Preservation, and Infrastructure.
- **Departmental Alignment:** Create specific "Action Plans" for departments to ensure daily operations support the broader tribal vision.
- **KPI Development:** Establish measurable Key Performance Indicators (KPIs) to track progress annually.

Phase III: Final Plan & Presentation

- **Strategic Roadmap:** Deliver a professional, easy-to-read Master Plan.

- **Implementation Guide:** Provide a "Year 1" execution schedule with assigned responsibilities.
- **Executive Presentation:** Present the final plan to the Executive Committee and the General Council for approval.

3. Submission Requirements

Interested firms must submit a proposal including the following:

- **Executive Summary:** A brief overview of the firm's philosophy and approach to tribal strategic planning.
- **Experience:** Evidence of previous work with Tribal Nations or similar government entities.
- **Proposed Methodology:** A detailed description of how you will engage with CIN community and staff.
- **Timeline:** A proposed schedule from kickoff to final delivery (ideally 6–9 months).
- **Budget:** A detailed cost breakdown for each phase of the project.

4. Evaluation Criteria

Proposals will be evaluated based on:

1. **Experience with Tribal Sovereignty:** Understanding the unique legal and cultural landscape of a Tribal Nation.
2. **Community-First Approach:** The quality of the plan for engaging tribal citizens.
3. **Clarity & Feasibility:** The practicality of the proposed timeline and budget.
4. **References:** Feedback from previous government or tribal clients.

5. Additional Provisions

1. CIN reserves the right to reject any or all proposals, waive technicalities, and be the sole judge of the suitability of the proposed services for its intended use and further reserves the right to make the contract award in the best interest of the organization. CIN also reserves the right to modify the scope of work, add or delete tasks, and modify the proposed project budget in contract negotiations with the top-ranked firm.
2. CIN exercises Indian Preference in accordance with Catawba Nation Preferential Hiring Ordinance and the Indian Self-Determination and Education Act (24 U.S.C.

450, et seq.), 25 CFR 271.44 and other relevant laws (title 25, U.S. Code, Section 472 & 473).

3. Depending on the proposals received, CIN may determine that interviews with the top-ranked firms or individuals are necessary. If interviews are unnecessary, firms and individuals will be ranked, and CIN will initiate contract negotiations with the highest ranked firm or individual.

Submission Instructions

Please submit digital copies of your proposal to:

Chief of Staff, Brittany Beck at Brittany.Beck@catawba.com

Subject Line: RFP Submission – 5-Year Strategic Plan

The Catawba Nation reserves the right to reject any and all proposals. Indian Preference will be applied in accordance with tribal law.