



Lakota Funds' mission is to promote economic sustainability on the Pine Ridge Reservation and geographic service area, through business loans, technical assistance, and wealth building education for families and businesses.

## REQUEST FOR PROPOSALS FOR STRATEGIC PLANNING FACILITATION

Lakota Funds was established in 1986 as the first Native American Community Development Financial Institution (CDFI). Lakota Funds provides small business loans to new start-up and growing businesses. Helping entrepreneurs on and within the boundaries of the Pine Ridge Indian Reservation, Lakota Funds is improving life by helping the Oglala Lakota people have access to capital, technical assistance, business networks and infrastructure.

Lakota Funds evaluates and continually improves our products and services to meet the needs of our target market. Lending remains the core of our program, but we also continue to offer a wide range of asset building programs.

As we continue to grow, we need to evaluate our strategic planning process, examine our history, analyze successes and challenges, and formulate strategic directions and goals for the future.

### Scope of Work

Lakota Funds is seeking a consultant to provide the following services:

- Information gathering in preparation for strategic planning session (which may include key stakeholder/Board interviews and/or stakeholder/Board survey);
- Agenda development in collaboration with Executive Director and/or Board Members;
- Preparation of handouts and support materials;
- Facilitation of 2-day in-person session tentatively set for early October 2022; and
- Preparation of follow-up materials from the session, including a three-year strategic plan and one-year work plan.

### Proposal Guidelines and Requirements

Please submit a written proposal not to exceed five pages addressing the following items:

- **Experience of the Firm:** Identify the firm's experience with facilitating strategic planning processes with Native-led organizations working in the Native CDFI fields economic development and affordable housing fields.
- **Qualifications of Key Personnel:** Identify the professional qualifications of the firm's assigned key personnel.
- **Native American Ownership or Employment:** Please include any information pertinent to the ownership of the firm or employment of Native Americans.



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- **Approach:** Explain your intended approach to facilitating the strategic planning process for the Coalition, including examples of specific tasks you propose to perform in order to deliver the items outlined above in the Scope of Work.
- **Cost:** Describe the proposed cost to providing these services, including estimated travel expenses. If the cost is based on an hourly rate, please provide both the rate and the estimate of the number of hours required for the examples of specific tasks described in your approach.

#### Evaluation Criteria

- The proposal is presented in a clear, logical manner and is well organized and responsive to this RFP.
- Relevant experience and expertise.
- Approach to the strategic planning process.
- Pricing structure and price level.

#### Contact Information and Deadline for Submission

Please submit all information requested above no later than **August 1, 2022** to:

Tawney Brunsch  
Executive Director, Lakota Funds  
P.O. Box 340  
Kyle, SD 57752  
(605) 455-2500

Questions about this RFP should be directed to Ms. Brunsch.