

REQUEST FOR PROPOSAL
Ho-Chunk Nation Financial Literacy Program
Division of Culture & Community Education
Department of Education
W9814 Airport Road – P.O. Box 667
Black River Falls, WI 54615-0667

Project Goal

To provide a web-based platform that will host the Ho-Chunk Nation’s required financial literacy course for Ho-Chunk tribal members who will graduate from high school and / or are 16-24 years of age.

Project Objectives

The statements below describe the overall objectives of this project. These should not be confused with the required response to this Request for Proposals (“RFP”) in terms of proposal format and content. Your proposal should cover your suggested approach to accomplishing each of these objectives, together with your estimated costs for doing so.

1. Provide the technology and security compatible with a wide-range of internet browsers to include the following implementation steps:
 - a. Assessment
 - b. Course Work
 - c. Evaluation
 - d. Reporting
 - e. American Disabilities Act considerations including but not limited to Individualized Learning Plans (IEPs), 504 Plans, and medical statements that support accommodations within programming.
2. Provide a web-based application for use on any mobile device that has a high level of security and technology.
3. Provide administrator rights to Ho-Chunk Nation Education staff to support student success of the online program and access to collected and recorded data to prepare reports to appropriate entities within the Nation.

Background

In 1963, the Winnebago Tribe of Wisconsin was recognized as a federal tribe pursuant to the Indian Reorganization Act of 1934. In November 1994, when our new Constitution was formally recognized by the Bureau of Indian Affairs, the Nation’s name legally changed to the Ho-Chunk Nation which the people have always called themselves. As a sovereign government, the HCN is dedicated to improving the lives of our members, socially and economically. Currently, gaming is the core business of the Nation. In addition to casinos and bingo halls, we operate convenience stores/gas stations, hotels, and other hospitality-based enterprises. We provide employment for

almost 3,400 persons in our government and enterprises. For additional information about the Nation, please visit: www.ho-chunknation.com.

Unlike many other native nations, the Nation does not have a single land base; and our trust land is primarily scattered throughout 14 counties in Wisconsin which constitute our primary service area: Adams, Clark, Columbia, Crawford, Eau Claire, Jackson, Juneau, La Crosse, Marathon, Monroe, Sauk, Shawano, Vernon, and Wood. The largest concentrations of Ho-Chunk members reside within these 14 counties and the urban areas of Madison and Milwaukee. A small percentage of our tribal population reside outside the state of Wisconsin.

Financial Literacy required course: Since 2016, the Ho-Chunk Nation Education Department has administered an online financial literacy course and wishes to continue providing the course with minimal interruption and change of current program capabilities.

Proposal Format and Content

Each proposal must include the following:

1. *Cover Letter.* A brief cover letter should summarize the key points of your proposal and stress your approach to addressing the project that is outlined above. It should address “what makes your proposal unique and why we should hire you.” Additional information must include the name of your organization, mailing address, telephone and fax numbers, e-mail address, name of a contact person, and background information related to the project. You are encouraged to suggest ways to simplify the project, improve the quality of the project, increase efficiency, and lower costs.
2. *Project Organization and Management Plan.* Your proposal must describe the functions of all personnel to be involved in the project, their roles, and the person designated to be the project leader. As specifically as possible, indicate the number of hours your staff expects to spend on the project. If a subcontracting or joint venture arrangement is proposed, support letters must be included from all parties. A description of any special requirements, innovations, or personnel needed to complete the project should also be included.
3. *Project Implementation Schedule.*
The implementation schedule of this project will begin in August 2023 and shall conform to the deadlines stated herein.
 - August 2023: Contract is signed between both parties.
 - September 2023: Coursework is ready for review by the Department of Education staff.
 - October 2023: Coursework is finalized and approved by Department of Education.
 - January 2024: Beta launch of online program
 - February 2024: Department of Education staff and students provide feedback to the vendor for potential revision of program.
 - April 2024: Revisions to the program, if any, will be complete.

- May 2024: Vendor reports Beta testing data and outcomes to the HCN Department of Education and the HCN Legislature.

If this timeline is not feasible, please propose and explain the timeline recommended by the company that encompasses the requirements explained herein.

Any anticipated meetings with the Ho-Chunk Nation should also be reflected in the timeline. We anticipate a minimum of four meetings to be held virtually or at the HCN Executive Office Building in Black River Falls, Wisconsin:

- a. a kick-off meeting with the selected vendor and HCN Department of Education staff who will be working on the project; and
 - b. one meeting to present the Financial Literacy proposal to HCN Department of Education staff; and
 - c. one in-person meeting to provide training of web-based financial literacy course for program administrator; and
 - d. one in-person meeting to present project details to the HCN Legislature
4. *Budget.* The following cost estimates are *required* when submitting your proposal:
 - a. costs related to preparing the web-based financial literacy course
 - b. cost rates for reimbursables
 5. *Recent Experience and Credentials.* This section of your proposal should include resumes of key personnel and a statement of qualifications with respect to recent relevant experience with similar projects. Please include brief descriptions of the services provided for at least three similar projects.
 6. *References.* Provide a minimum of three clients, including addresses, telephone numbers, and contact persons, for whom similar services have been performed.
 7. *Statement of Confidentiality.* Provide a signed and dated statement assuring the confidentiality of all documents, discussions, reports, and other information received and prepared as part of this project, inclusive of the contents of this RFP (“Confidential Material”). All work product of the proponent relating to this project is Confidential Material.
 8. *Trademark and Copyright Ownership of the Ho-Chunk Language Publications and Materials.* Provide a signed and dated statement assuring the understanding that the Ho-Chunk Nation will retain all copyright ownership and exclusive publishing rights as outlined in The Ho-Chunk Nation *Language and Culture Code 7HCC§4, Chapter 9,*

Trademark and Copyright Ownership of Ho-Chunk Language Publications and Materials and any other applicable laws of the Ho-Chunk Nation. (Provided as attachment).

Proposal Submission

An electronic or hard copy of the proposal must be received by Ms. Michelle Cloud by 4:00 p.m. on June 23, 2023, at the following address:

Michelle R Cloud, Division Manager
Culture & Community Education Division
Ho-Chunk Nation Department of Education
P.O. Box 667
Black River Falls, WI 54615-0667
E-mail: Michelle.Cloud@ho-chunk.com

The HCN reserves the right to reject any or all proposals it receives as part of the selection process. All proposals must be complete, accurate, and in conformance with the RFP. Any material omission, inaccuracy, or misstatement may be cause for rejection of the proposal. The HCN will not assume any liability or costs associated with the completion of a proposal pursuant to this RFP. Please contact Culture & Community Education Division Manager Michelle R Cloud at 715-284-4915 extension 11269 should you have any questions regarding this RFP.

GENERAL REQUIREMENTS

This procurement will be conducted in accordance with the following procurement process:

1. *Incurring Cost*
Any cost incurred by the respondent in the preparation, transmittal, and presentation of any proposal or material submitted in response to this RFP shall be borne solely by the respondent.
2. *Amended Proposals*
A respondent may submit an amended proposal before the receipt deadline of proposals. Such amended proposals must be complete replacements for a previously submitted proposal and must be clearly identified as such in the transmittal letter. The Ho-Chunk Nation will not merge, collate, or assemble proposal materials.
3. *Respondent's Right to Withdraw Proposal*
A respondent will be allowed to withdraw its proposal at any time prior to entering into agreement with the Nation. A respondent shall do so by written request to the Principal Contact.
4. *No Obligation*
This Request for Proposal in no manner obligates the Ho-Chunk Nation to use any proposed professional services until a valid written contract is awarded and approved by the appropriate authorities.

5. Termination
This RFP may be canceled at any time and any and all proposals may be rejected if the Ho-Chunk Nation determines such an action to be in the best interest of the Ho-Chunk Nation.
6. Sufficient Appropriations
Any contract awarded as a result of this RFP process may terminate if sufficient appropriations or authorizations do not exist. Sending written notice to the respondent will affect such termination. The Ho-Chunk Nation's decision as to whether sufficient appropriations and authorizations are available will be accepted by the respondent as final.
7. Legal Review
The Ho-Chunk Nation requires that all respondents agree to be bound by the General Requirements contained in this RFP. Any respondent concerns must be promptly brought to the attention of the Principal Contact.
8. Governing Law
The laws of the Ho-Chunk Nation shall govern this procurement and any agreement with respondents that may result.
9. Basis for Proposal
Only information supplied by the Ho-Chunk Nation in writing to the Principal Contact or in this RFP shall be used as the basis for the preparation of respondent proposals.
10. Contract Terms and Conditions
The contract between the Ho-Chunk Nation and a respondent will follow the format specified by the Ho-Chunk Nation and contain the terms and conditions contained in this RFP. However, the Ho-Chunk Nation reserves the right to negotiate with a successful respondent, provisions in addition to those contained in this RFP. Should a respondent object to any of the Ho-Chunk Nation's terms and conditions, the respondent must propose specific alternative language. The Ho-Chunk Nation may or may not accept the alternative language.
11. Respondent's Terms and Conditions
A respondent must submit with the proposal a complete set of any additional terms and conditions that it desires to have included in a contract negotiated with the Ho-Chunk Nation.
12. Respondent's Qualifications
The Ho-Chunk Nation may make such investigations as it deems appropriate to determine the ability of a respondent to adhere to the requirements specified within this RFP. The Ho-Chunk Nation will reject the proposal of any respondent deemed not to be a responsible respondent or that fails to submit a responsive offer.
13. No Employment Benefits
Pursuant to Contract Terms to be agreed upon, the successful respondent will be an independent contractor, not an employee of the Ho-Chunk Nation. Accordingly, the

successful respondent will not be entitled to the benefits provided by the Ho-Chunk Nation to its employees.

14. *Confidentiality & Right to Publish*

Throughout the duration of this procurement process and any contract term, potential respondents must maintain strict confidentiality regarding the *Financial Literacy Program*. Respondents must secure written approval from the Ho-Chunk Nation prior to release of any information that pertains to the potential work or activities covered by this procurement or the subsequent contract. Failure to adhere to this requirement may result in disqualification of the respondent's proposal or termination of the contract.

15. *Electronic Mail Address Required*

Some or all of the communication regarding this procurement will be conducted by electronic mail (e-mail). Therefore, a respondent must provide a valid e-mail address.

16. *Use of Electronic Versions of this RFP*

This RFP is being made available by electronic means. If accepted by such means, the respondent acknowledges and accepts full responsibility to ensure that no changes are made to the RFP. In the event of any conflict between a version of the RFP in the respondent's possession and the version maintained by the Ho-Chunk Nation, the version maintained by the Ho-Chunk Nation shall govern.