



# Pathways to Prosperity

## Request for Proposals

### I. Introduction

The Sovereign Equity Fund (SEF) is seeking proposals to develop and implement a training program aimed at improving the financial management capacity of Tribal Colleges and Universities (TCUs). This initiative, part of the **Pathways to Prosperity** initiative, will enhance TCU staff's ability to understand Generally Accepted Accounting Principles (GAAP), prepare for audits, and secure funding from both federal and private sources.

### II. Project Description

The **Pathways to Prosperity** project will develop a comprehensive training program that equips TCU staff with the tools and knowledge necessary for successful financial management and audit preparation. This program will be designed to enhance TCU competence as grantees for both federal and private funding sources, supporting their long-term success and sustainability.

### III. Scope of Services

The selected vendor will be responsible for developing and delivering the following services:

#### 1. Training Program Development

- Create a robust training program tailored to the specific needs of Tribal Colleges and Universities (TCUs).
- The program must include:
  - **Workshops** on Generally Accepted Accounting Principles (GAAP) for staff at varying levels of experience.
  - **Seminars** on audit preparation, compliance, and best practices for managing audits successfully.
  - **Resources for ongoing learning and development** including materials for continual reference.

#### 2. Training Materials Development

- Develop and distribute training manuals, guides, and other supporting resources, which may include a combination of newly created materials and compiled prior resources.

- Provide digital resources for easy distribution among TCU staff.
- 3. **Ongoing Support and Follow-Up**
  - Ensure the training program includes a framework for ongoing consultation or support services post-training.

#### **IV. Project Timeline**

- **RFP start date:** April 15, 2025
- **Proposals due:** May 15, 2025
- **Selection period:** Late May 2025
- **Notification period:** Early June 2025
- **Contract start date:** June 15, 2025
- **Training program start date:** August 2025
- **Training program end date:** March 2026

#### **V. Budget**

The estimated budget for this project is **\$15,000 - \$20,000**. Proposals should include a detailed budget that outlines costs for program development, delivery, and materials production, as well as any additional expenses.

#### **VI. Proposal Submission Guidelines**

All proposals must be submitted by **May 15, 2025** to the following email address:  
[cchavis@sovereignequityfund.org](mailto:cchavis@sovereignequityfund.org)

Proposals must include the following:

- A brief overview of the company/organization and relevant experience
- A detailed description of the proposed training program, including topics, structure, and methods of delivery
- A timeline of milestones and deliverables
- A breakdown of the budget, including costs associated with program development, delivery, and materials
- A list of personnel who will be involved in the project, along with their qualifications and relevant experience
- Examples of previous work or case studies demonstrating successful training program development and implementation
- References from previous clients or partners, if available

#### **VII. Evaluation Criteria**

Proposals will be evaluated based on the following criteria:

1. **Relevance and Quality of the Proposed Program (30%)**
  - How well the proposed program addresses the needs of Tribal Colleges and Universities, particularly with regard to GAAP understanding and audit preparedness.
  - The quality and comprehensiveness of the training materials.
2. **Experience and Qualifications (25%)**
  - Experience in developing and delivering training programs for organizations or educational institutions, particularly in fiscal management or compliance training.
  - Expertise in working with nonprofit organizations or higher education institutions, ideally with TCUs.
3. **Cost-Effectiveness and Budget (25%)**
  - The proposal's alignment with the estimated budget and a clear breakdown of costs.
4. **Implementation Plan and Timeline (20%)**
  - The clarity and feasibility of the proposed timeline, with realistic milestones and deliverables.

## **IX. Selection Process**

SEF will review all proposals and select a vendor based on the evaluation criteria outlined above. The selected vendor will be notified by early June 2025, and contracts will be finalized by mid-June. SEF reserves the right to request further clarification or modifications to any proposals before making a final decision.

## **X. Additional Information**

If you have any questions or require clarification on any aspect of this RFP, please contact:

**Courtney Chavis, Executive Director**

Email: [cchavis@sovereignequityfund.org](mailto:cchavis@sovereignequityfund.org)

Thank you for your interest in contributing to the success and sustainability of Tribal Colleges and Universities. We look forward to reviewing your proposal.