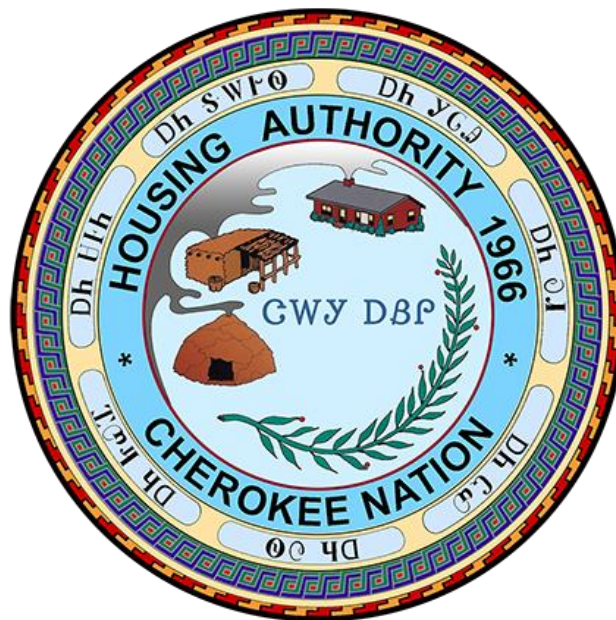


REQUEST FOR PROPOSALS (RFP)

# Asset Tracking & Labeling



Due Date: Friday, May 17th @ 5:00 PM (Central)

## Housing Authority of the Cherokee Nation

Department: Finance Department

Mailing Address: PO BOX 1007 • Tahlequah OK 74465-1007

Contact: 918-456-5482 | Dennis Fine

Contact Email: [dennis.fine@hacn.org](mailto:dennis.fine@hacn.org)

## REQUEST FOR PROPOSALS (RFP)

### Introduction:

The Housing Authority of the Cherokee Nation (HACN) was created in 1966 to provide decent, safe, and sanitary housing within the Cherokee Nation. Today, HACN continues that original mission of providing housing assistance through several diverse programs ([www.hacn.org](http://www.hacn.org)).

HACN is an entity of the Cherokee Nation and functions independently from the Cherokee Nation federal government. HACN operates on a separate infrastructure in all aspects. HACN has approximately 250 staff and covers the same 14-county reservation area of the Cherokee Nation in Northeastern Oklahoma.

### General Provisions

**Purpose of the REQUEST FOR PROPOSALS (RFP):** HACN is soliciting detailed proposals from interested parties with qualifications, credentials, and previous experience providing services for organizations similar in size and scope. The complete scope of work and specifications are included in this REQUEST FOR PROPOSALS (RFP).

**Other Licenses and Registrations Requirement:** All consultants are required to hold any and all necessary applicable professional licenses and registrations required by law. Proof of professional licenses are required with the proposal. Obtaining and ensuring compliance with all licensing and registering requirements is the complete responsibility of the contractor.

**Cherokee and Indian Preference:** HACN will be accepting proposals from Indian and Non-Indian parties. Indian preference will be given only to Vendors who provide proof of current certification from the Cherokee Nation Tribal Employment Rights Office (TERO) located in Tahlequah, OK. Proof of TERO certification must be included with the submission. The awarded contract is subject to Section 7(b) of the Indian Self-Determination and Education Assistance Act, which requires in part that to the greatest extent feasible, preference in the award of contracts and subcontracts shall be given to Indian Organizations and Indian Owned Economic Enterprises.

**Conflict of Interest and Restrictions:** If any contractor, contractor's employee, subcontractor, or any individual working on the proposed contract may have a possible conflict of interest that may affect the objectivity, analysis, and/or performance of the contract, it shall be declared in writing upon discovery, via contact information posted in this REQUEST FOR PROPOSALS (RFP). HACN will determine in writing if the conflict is significant and material and if so, may eliminate the contractor from submitting a proposal.

**Verbal Instructions:** Interested parties shall not initiate or execute any negotiation, decision, or action arising from any verbal discussion with any HACN employee. Only written communications from the designated Contact Person at HACN may be considered a duly authorized expression on behalf of HACN regarding this REQUEST FOR PROPOSALS (RFP). Additionally, only written communications from interested parties are recognized as duly authorized expressions on behalf of the vendor. The same instructions shall apply to any subsequent award and agreement communications.

**Binding Contract:** This REQUEST FOR PROPOSALS (RFP) does not obligate HACN or the selected contractor until a contract is signed and approved by both parties. If approved, it is effective from the date of final approval. HACN shall not be responsible for work done, even in good faith, prior to final approval of the proposed contract. Any and all costs incurred by contractor's preparing and submitting a proposal are the contractor's responsibility and shall not be charged to the HACN or reflected as an expense of a resulting contract.

**Cancellation of the REQUEST FOR PROPOSALS (RFP):** HACN retains the right to cancel, modify, amend, or withdraw, the REQUEST FOR PROPOSALS (RFP) process at any time, at HACN's sole discretion. HACN shall not be responsible for costs incurred by contractors for proposal preparation.

**Disclosure of Proposal Contents:** HACN will not disclose the list of vendors that have responded to the posted REQUEST FOR PROPOSALS (RFP), or any content from a submission, throughout the review process. Once a contract has been awarded, the winning vendor will be listed with the original post online (cherokeebids.org).

## **Acceptance**

Submissions will be accepted from Indian and Non-Indian Vendors. HACN reserves the right to determine if the submission meets stated requirements, in the best interest of the HACN, to further the discussion with scheduled demonstrations and interviews. To be considered, submissions must be received by the specified date and time. HACN reserves the right to reject any and all submissions.

**Method of Award:** After reviewing all submissions received and HACN has determined the ability to move forward, a purchase order will be awarded to the responsible Vendor whose submission is determined to be the lowest, in the best interest, and most responsive in accordance with the HACN Procurement Policy.

**Non-Appropriation Termination Clause:** Must be agreed to with multi-year contracts. The HACN's obligation for payment under any contract/agreement is contingent upon the availability of appropriated funds from which payment for services can be made. Funds are available for the Fiscal year budget only when appropriated or authorized by the Tribal Council of the Cherokee Nation and/or the Board of Commissioners of the Housing Authority of the Cherokee Nation. The HACN's designated officer shall use their best efforts to obtain the annual appropriations of the Base Payments throughout the Lease/Contract Term.

No legal liability on the part of the HACN for any payment may arise until funds are made available by the designated officer of the HACN for performance and until the CONTRACTOR/VENDOR receives notice of availability from the HACN's designated officer through issuance of a purchase order (PO).

## Communication

**Contact for this REQUEST FOR PROPOSALS (RFP):** All communication regarding this REQUEST FOR PROPOSALS (RFP), including questions, additional information, notifications, document attachments, etc., must be submitted, by specified deadlines outlined below:

- **Email:** [dennis.fine@hacn.org](mailto:dennis.fine@hacn.org) With email subject line including the “2024-001-050” & **Subject Matter**. Replies to email may come from project individuals with @hacn.org domain. ALWAYS include this email contact with ALL communications regarding this RFP to be considered as a valid RFP communication.
- **Phone:** Contact Phone **918-456-5482**, Ask for “**Dennis Fine**” from the attendant or operator.
- **Fax:** [Company Fax]
- **Physical:** Mailing Address:

Housing Authority of the Cherokee Nation  
Finance Department  
PO BOX 1007 • Tahlequah OK 74465-1007

**Deadline for Receipt of Proposals & Submission Details:** Responses must be submitted to the contact listed. It is the Vendor’s responsibility to ensure delivery of responses by the due date listed. Responses received after the deadline will not be considered.

- ✓ **Email method only** for submissions and communications ([dennis.fine@hacn.org](mailto:dennis.fine@hacn.org))
- ✓ Questions (Project specific or Provisions listed within) must be submitted no later than end of day **5/10/2024**.
  - HACN will list all questions and answers and Blind Carbon Copy (BCC) all initial inquiries, within 3 business days.
- ✓ Response Submission Deadline no later than **Due Date: Friday, May 17th @ 5:00 PM (Central)**

### REQUEST FOR PROPOSALS (RFP)

## Asset Tracking & Labeling

The Finance Department of the Housing Authority of the Cherokee Nation is seeking a REQUEST FOR PROPOSALS (RFP) from interested parties for **Asset Tracking & Labeling** as specified below. To be considered a responsive submission, the mandatory response sheet must be fully completed and submitted no later **Friday, May 17th @ 5:00 PM (Central)** to [dennis.fine@hacn.org](mailto:dennis.fine@hacn.org).

### Problems to Solve

HACN is looking for an **Asset Tracking & Labeling** solution. HACN is required to track purchased assets in excess of \$100, where and to whom it was assigned, and produce various types of reports for auditing and financial needs. The asset management staff will need a way to label an asset (such as a barcode/QR code) to identify the asset within the system once it has been assigned or distributed.

### Minimum Specifications & Solutions Requirements:

- 1) Barcode/QR code labeling and scanner system
  - a. Create Asset ID
  - b. Preference for mobility
  - c. Ability to use serial or model numbers in lieu of barcode for small items
- 2) Customizable fields for information based on categories
  - a. Example: Construction tools have different information (and reporting) than electronics, heavy equipment, or vehicle type categories
- 3) Customizable fields for tracking and reporting
  - a. Example: We may want to add fields such as Purchase Order (PO#) asset was purchased under, dollar value, and asset type (depreciable) for financial reporting.
  - b. Example: Reporting by assigned person, department, location (building, room, vehicle, etc.)
  - c. Ability to self-customize as needed
- 4) Simplified Check In/Out process
- 5) Drill down/pivot search capabilities
  - a. Example: Search ID/Code# to find where it is assigned and display other assets also assigned, drill down to asset information.
- 6) System interface configurable
  - a. Example: Finance department would require access to specific reports where IT staff may require access to enter technology specific assets not handled by the main asset management staff. Contracts department may need to enter contract or procurement specific information to an item, separately from the asset management staff.
- 7) Additional consideration (non-requirement added value for evaluations)
  - a. Software integrations with current systems
  - b. License/seat flexibility and central account management (user assignment changes)
  - c. Workflow capabilities (approvals, notifications, etc.)
  - d. Contingencies, data ownership, data privacy

## Additional Information

- HACN:
  - 23+ locations throughout 14 county Cherokee Nation reservation (Northeastern Oklahoma)
  - Users:
    - Asset Management/Contracts staff (5 users)
    - Finance (3 users)
    - Account/Licensing Administration, computer support (2 non-user)
  
- Technology:
  - HACN-IT supports Microsoft based (Hyper-V) servers, (SQL) Database, SSO, Azure.
  - Computer operating systems are Microsoft Window 10, 11; MS Edge browser; Office 365 & TEAMS fully integrated.
  - Mobile devices are (Samsung) Android.

## Review of Submissions

**Acceptance of Conditions Governing the Procurement:** Vendors must indicate their acceptance of conditions governing this procurement in their cover letter.

**HACN is Tax exempt.** Please include acknowledgement of Tax exemption status.

**Non-Appropriation Termination Clause:** Vendors must indicate their acceptance of the non-appropriations clause with multi-year contracts.

**Incurring Cost:** Any costs incurred by the vendor in preparation, transmittal, or presentation of any proposal, or material submitted in response to this REQUEST FOR PROPOSALS (RFP) shall be the responsibility of the vendor. The vendor is responsible for all costs associated with travel for on-site demonstrations upon the request of HACN.

**Responsiveness:** Prior to evaluation, each submission shall be reviewed to determine whether it is responsive. Nonresponsive submissions shall be eliminated and will not be evaluated. Factors that may result in a submission being declared nonresponsive are:

- 1) Not providing evidence of meeting the Minimum Requirements.
- 2) When applicable, Not attending mandatory meetings or site visit.

- 3) Substantive and material conflicts of interest which were not declared and/or were declared and determined to be significant enough that the HACN requested the potential contractor not submit a REQUEST FOR PROPOSALS (RFP).
- 4) Substantive and material noncompliance to requirements listed or adherence to submission guideline.
- 5) Not providing a price or timeline, if applicable.
- 6) Not meeting established deadlines

**Evaluation Process:** An evaluation committee consisting of HACN employees shall evaluate responsive submissions. Each member of the evaluation committee shall independently evaluate each submission. The evaluation will be based on the evaluation factors and values stated in this REQUEST FOR PROPOSALS (RFP). Discussions, presentations, and/or site visits, if held, may result in individual evaluation committee members changing their scores.

**Review Cycle:** HACN is aware that a final proposal may require product demonstrations, detail interviews, and further discovery meetings. Here is what to expect during the review process following the submission due date **Friday, May 17th @ 5:00 PM (Central)**. HACN reserves the right to extend or alter timelines if deemed necessary or beneficial to the HACN project:

Stage 1: The week following the submission deadline, the review committee will review all proposals and a project coordinator will schedule an introductory call that will allow a time for a detailed discussion and product demonstrations, to further define the scope of the project and allow vendor/contractor to revise proposals and estimated cost.

- Deadline for revised proposals and estimates will be the end of the second week (14 days) following the submission deadline.

Stage 2: (Week 3) After deadline for revised proposals and estimates, the review committee will review all submissions and choose the top 3 vendors accepted to continue to stage 3. Notifications will be sent to all contacts by end of week.

- Accepted proposals and estimates will be scheduled for a final meeting for the following week (week 4), to detail and finalize the scope of work and pricing.

Stage 3: (Week 4) Deadline for FINAL PROPOSALS, QUOTES/BIDS will be the end of the fourth week.

- Final review and vendor selection to be completed on the following week (week 5). Notifications will be sent to all contacts at conclusion.

Example calendar of events:

Deadline							Stage 1							Stage 2							Stage 3 (Final)						
Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
				X							X							X							X		
											X							X							X		
												X							X							X	
													X							X							X

**Evaluation Factors:** The evaluation factors listed below and must be clearly stated and addressed and stated in the submission. The Evaluation Factors and the value of each are:

EVALUATION FACTORS	Points
TERO Certification (certificate must be included)	10
Experience; Qualifications; Accreditations; Company history	20
Required and Minimum Solutions Requirements	10
Costs	10
<b>TOTAL</b>	<b>50</b>



# MANDATORY RESPONSE SHEET

## BASE REQUEST FOR PROPOSALS (RFP) Includes: (Check List)

- \_\_\_\_\_ Proposed Solution(s)
- \_\_\_\_\_ Company & Project Team Information (Experience & Qualifications)
- \_\_\_\_\_ Pre-Interview Estimated Costs
- \_\_\_\_\_ Contracts/Agreements/Support Assurances
- \_\_\_\_\_ References (with valid email/phone contacts)
- \_\_\_\_\_ Acceptance of Conditions Governing the Procurement
- \_\_\_\_\_ Acceptance of HACN is Tax exemption status
- \_\_\_\_\_ Acceptance of Non-Appropriation Termination Clause (applicable for multi-year contracts)

### INDIAN PREFERENCE

TERO Certified Vendor: \_\_\_\_\_ Yes \_\_\_\_\_ No  
 (Proof of certification **must** be included) Front & Back

SUBMITTED:

\_\_\_\_\_

Supplier Name & Phone Number

\_\_\_\_\_

Supplier Address

\_\_\_\_\_

Authorized Signature

**NON-COLLUSIVE AFFIDAVIT**

State of \_\_\_\_\_

County of \_\_\_\_\_

\_\_\_\_\_ being first duly sworn, deposed and says that he/she is a partner or officer of the firm of \_\_\_\_\_, the party making and foregoing proposal or bid, that such proposal or bid is genuine and not collusive or sham; that said bidder has not colluded, conspired, connived or agreed, directly or indirectly, with any bidder or person, to put in a sham bid or to refrain from bidding, and has not in any manner, directly or indirectly, sought by agreement or collusion or communication or conference, with any person to fix the bid price of affiant or any other bidder, or to fix overhead, profit or cost element of said bid price, or that of any other bidder, or to secure any advantage against the Housing Authority of the Cherokee Nation, or any person interested in the proposed contract; and, that all statements in said proposal or bid are true.

Signed: \_\_\_\_\_

(Bidder, if the bid is an individual;  
Partner, if the bid is a partnership;  
Officer, if the bid is a corporation)

Subscribed and sworn to before me this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_.

My commission expires \_\_\_\_\_, 20\_\_\_\_.

\_\_\_\_\_  
Notary Public Signature

\_\_\_\_\_  
Commission Number