

# **Tender for Consultancy Services: Development of a Strategic Plan for Exchange House Ireland National Traveller Services 2025–2030**

## **Introduction**

### **Exchange House Ireland National Traveller Service**

Exchange House Ireland National Travellers Service is an organisation of Traveller and non-Travellers and a leading provider of front line and support services to some of the most marginalised Travellers in Ireland since 1980.

We are a multi-disciplinary frontline service provider offering Education and Training Services, Children and Young People Services, Family Support and Crisis Intervention Services, Addiction Services and the National Traveller Mental Health Service. We also deliver partnership services through training, provision of expertise and collaborative working with other organisations providing services to Travellers in Ireland. Our aim is to break down barriers and discrimination in order to facilitate Travellers to access the range of services they need in an equitable way.

Exchange House Ireland has been providing a professional standard of practice that has been shown to produce good results with our client group for over 40 years. Exchange House Ireland utilises a distinctive multi-disciplinary approach. Clients are facilitated to address their individual situation and needs under one roof where possible, and link them into additional services when this is beneficial. We work with a service user group who often face multiple social issues and barriers and have a skilled staff team throughout the organisation who can work with members of the Traveller community to facilitate positive outcomes.

## **Objectives**

The main objectives of Tribli Company Limited by Guarantee, trading as Exchange House Ireland National Travellers Service, as set out in our constitution are:

- a) to provide a range of family support services for Travellers; to support Travellers in their struggle against oppression and discrimination in promoting equal opportunities for Travellers in the areas of health, education, training, accommodation, employment and enterprise and access to leisure opportunities of their choice.
- b) with subsidiary objectives:
  - (i) to act as agents, representatives, advisors, consultants for community organisations, whether voluntary or not, for companies, partnerships, firms and all those involved in the development of the above main objectives
  - (ii) to engage in providing facilities such as health and educational programmes, housing projects,
  - (ii) the promotion and development of equal opportunities for Travellers

## **Current Plan**

The current Strategic Plan 2019 – 2022 has been extended to allow us to fully evaluate progress compared to the plan and assess where the organisation is now. The organisation has been going

through a period of growth and wants to make sure that we have all of the structural needs to continue to grow.

The current Strategic Plan has five Strategic Priorities:

- To deliver frontline services of excellence to the Traveller community that are professional and trusted
- To provide information and promote our services as one of expertise and best practice in our field
- To provide services including advocacy for individuals and families in the Traveller community and celebrate their achievements
- To work in partnership with Traveller specific and mainstream services, representative structures and funding partners to increase the capacity to deliver best services to the Traveller community
- To bring together people with a range of skills, knowledge and experience to deliver best practice in all our services. To invest in people and provide support and advancement for those in the organisation.

We want to evaluate how well these priorities have been achieved over the past 6 years and how they might inform the next 5 years in terms of our strategic priorities.

### **Our Current Vision**

To live in an Ireland where Travellers are fully valued as a distinct ethnic minority receiving equitable treatment and access to all supports and services without barriers

### **Our Current Mission**

Exchange House Ireland is an organisation of Travellers and non-Travellers working together to provide frontline services of excellence to the community. We also strive to work with partner agencies to improve service standards and accessibility for the Traveller community to all services

### **Core Principles**

In all of our work, we are guided by the principles of:

- Professionalism
- Equality
- Diversity
- Excellence

### **Context**

The Exchange House Ireland Board see 2025 as a time to take stock of our progress against the current strategy as well as identify achievements and shifts since the creation of the last plan in 2019. Added to this, the external context (political, economic, social, technological, environmental, legal) has changed, and we want to understand how to best respond.

### **Requirements**

We are seeking to retain a Consultant(s) to support the development of a Strategic Plan for the years 2025 to 2030. We require the strategic planning process to be trauma-informed, in order that we can live the values we wish to see embedded across our organisation.

Specifically, the outputs we require are:

- Evaluate the organisations ability to withstand any further growth and identify areas of specific risks in current structure, communication and decision making.
- Outline a clear, updated organisational structure with which to implement the new strategic plan, given the growth and future aims of the organisation.
- Evaluate success of current plan - to complete a review of our performance against the current strategy and to facilitate Board and Staff engagement with the results. The review outcomes will form the basis for the priorities selected in the Strategic Plan.
- To facilitate the development of a 5-year Strategic Plan for Exchange House Ireland (2025-2030) and to facilitate Board and Staff engagement with the outline proposals.
- To engage effectively with the Board, all staff, service users and other key stakeholders to develop a shared vision, mission, and strategy.
- To strengthen learning for key staff and board members with respect to leadership, teamwork, culture, developing and implementing strategy, effective communication, collaboration and structures.
- Together with the CEO to present a completed strategy document (which must include “plan on a page” methodology), to the Exchange House Ireland Board by the start of February 2026.

### **Scope of Work / Tasks**

The consultant(s) will be expected to:

#### *Desk Review*

1. Review internal documents (current strategy, annual reports, evaluations)
2. Analyse relevant national policies and literature (e.g. National Traveller and Roma Inclusion Strategy).

#### *Stakeholder Engagement*

1. Design and conduct culturally appropriate consultations (focus groups, interviews, surveys)
2. Include Traveller community members, staff, board, funders, and partners.

#### *Organisational Analysis*

1. Utilise internal analyses already completed (SWOTs, values exercise, feedback culture exercise, staff survey, organisational lifeline exercise), conduct organisational capacity assessment
2. Assess governance, funding base and operational capacity.

#### *Strategic Framework Development*

1. Facilitate workshops to refine mission, vision, and values
2. Identify strategic priorities, objectives and indicators
3. Draft a costed implementation plan with timelines and responsibilities.

#### *Validation and Finalisation*

1. Present draft strategy to board/staff for feedback
2. Finalise and submit a full strategic plan, executive summary and presentation deck.

### **Deliverables**

1. Inception report (approach, methodology, work plan, timelines, tasks)
2. Stakeholder consultation report
3. Draft strategic plan
4. Final strategic plan (visual, accessible, culturally appropriate) \*Must include “plan on a page”
5. Executive Summary (2–3 pages)

6. Presentation deck for board and community.

### **Timeframe and Process**

It is envisaged that the successful tenderer will deliver work in two phases:

- November 2025 – January 2026: support the creation of the next Strategic Plan.
- Provide a draft strategic plan by the start of February 2026
- The new Strategic Plan should be ready to be launched in conjunction with the CEO by the start of February 2026.

### **Accountability and Management**

The contract for services lies with Exchange House Ireland. The primary point of contact for the successful tenderer will be Kerry Cuskelly, CEO, Exchange House Ireland. The successful tenderer will be expected to:

- Maintain regular contact with the CEO, responding to communications in a timely manner
- Be flexible and responsive to the needs of the organisation as they arise
- Be proactive in seeking clarification, information or guidance as needed.

### **Competency and Expertise Requirements**

- an understanding of development issues generally
- be trauma-informed and have experience in supporting the development and implementation of trauma-informed organisations
- an understanding of organisational issues
- a proven track record in project management
- insight and empathy
- authority/credibility
- experience in running strategic planning processes
- a good reputation with previous clients
- conflict management skills and confidence about handling conflict
- ability to help clarify our outcomes
- a commitment to helping us reach our desired outcomes
- honesty and fairness
- logic, self-discipline and the ability to operate systematically
- commitment to deadlines
- verbal and written skills
- a style that suits our organisation, and
- reasonable rates, measured against market prices.

### **Tender Requirements**

Tenders for this work must include:

- Name of applicant / organisation name, address and contact details. In the case of an organisation, please assign one person as the principal contact
- A statement outlining the understanding of the brief (max 1000 words)
- Personnel involved – details of all personnel who will be involved, including a CV which outlines their qualifications/experience
- Description of proposed project approach, methodology, actions and timeframe (max. 1500 words)

- Examples of two relevant previous projects along with a separate referee for each, including contact details, for both projects
- Costs – detailed costs including any associated costs, VAT inclusive
- Notification of any potential conflicts of interest
- An up-to-date copy of the tenderer’s Tax Clearance Certificate and relevant insurances.
- Signed Declaration of all the above.

### **Evaluation of Tender Submissions**

Evaluations of Tender submissions will be based on criteria specified in the Tender requirements, using the following award criteria:

- Understanding the Brief 20%
- Relevant Knowledge, Expertise, Experience, Project Management and Resources Allocated 30%
- Content and Quality of Proposed Plan and Methodology 30%
- Cost 20%.

Total marks 100%.

Tenderers must achieve a minimum score of 60% of the total marks available for each of the individual qualitative criteria. Any Tender which does not meet this minimum threshold shall be excluded from further consideration.

A Tender assessment panel will assess the applications under the criteria outlined below and to award the contract to the successful tenderer. The panel will have to be satisfied that the method and programme of work meet the requirements outlined and are cost effective. The panel does not commit itself to accepting the lowest Tender and will not accept any responsibility for any expenses incurred in the preparation and submission of a Tender. The panel may cancel the process at any time. Exchange House Ireland will not engage in any discussions or negotiations in advance of adjudication. Following completion of the Tender evaluation, the successful tenderer will be notified in writing by email. Once the offer is accepted, emails will be issued to the unsuccessful tenderer/s notifying them of the result. Exchange House Ireland is not in a position to provide feedback on unsuccessful tenders.

### Criteria for tender assessment

#### 1. Understanding the Brief

Those tendering should demonstrate in their proposals a good understanding of the brief and issues which this strategic plan is seeking to address, including an excellent understanding of issues relating to strategic planning, NGOs, the Traveller community in Ireland and the main issues they face.

#### 2. Relevant Knowledge, Expertise, Experience and Resources Allocated

The highest scores will be awarded to the tenderers with the most appropriate knowledge and experience in delivering similar projects. The tenderer must supply a CV of the person who will be carrying out the work.

#### 3. Content and Quality of Proposed Plan and Methodology

This refers to the proposed approach to the design and development given the content in this Request for Tender. Tenderers must demonstrate their capability to bring the contract to a satisfactory conclusion by describing the methodology of approach to accomplish the project's required outcomes within the stated timeframe. This should be outlined clearly, concisely and sequentially.

#### 4. Cost

This must include all costs and expenses for the work. Quotations should be inclusive of VAT and in Euro. All prices quotes must remain valid for the duration of the work.

### **Shortlisting**

A shortlist of applicants may be invited to present or provide further information on their bid prior to selection. An invitation to interview will not be an indication that a contract has been awarded. Applicants attending such interviews will do so at their own cost.

### **Budget and Schedule of Payments**

A payment schedule will be agreed with the successful tenderer prior to the commencement of the work based on project deliverables.

### **Insurance**

The successful tenderer must produce evidence of professional indemnity as part of the Tender submission and this cover needs to be in place for the duration of the contract for work.

### **Conflicts of Interest**

Any conflicts of interest involving a tenderer must be fully disclosed in a timely manner to Exchange House Ireland. Failure to disclose a conflict of interest may disqualify a bidder or invalidate an award of contract, depending on when the conflict of interest comes to light. If no conflict of interest exists, tenderers must indicate that in writing.

### **Ownership of Material Resulting from this Work**

Exchange House Ireland will retain ownership of research, materials and/or documentation resulting from the development of the strategic plan. All research, materials and/or documentation must be returned to Exchange House Ireland on request or in the event that the contract is terminated. No part of the research, materials and/or documentation may be used without the prior consent of Exchange House Ireland.

**Tenders should be sent by email to [ceo@exchangehouse.ie](mailto:ceo@exchangehouse.ie) by Friday November 21<sup>st</sup> 2025 @ 5pm.** Any tenders received after this time and date will not be considered for adjudication.