

BAD RIVER BAND OF LAKE SUPERIOR TRIBE OF CHIPPEWA INDIANS

CHIEF BLACKBIRD CENTER

P.O. Box 39 Odanah, Wisconsin 54861

REQUEST FOR PROPOSALS

FOR A

Workflow Management System for MNRD Review Processes

Bad River Band of Lake Superior Tribe of Chippewa Indians is seeking proposals through solicitation for a workflow management and tracking system (WM&TS). Specifically, a cloud-based platform is being pursued to streamline and comprehensively track project reviews and approvals for the benefit of applicants and Mashkiiziibii Natural Resources Department (MNRD) staff during and after the COVID-19 pandemic. The project review process was adopted to efficiently and comprehensively review project proposals within the external boundaries of the Bad River Reservation to ensure compliance with the Tribe's Environmental Codes and Regulations and help applicants develop environmentally friendly projects. The cloud-based WM&TS should include the following: 1) Establish a cloud-based platform to host a WM&TS with customer and staff interfaces; 2) Provide applicants with the means to review the status of projects and respond to requests for information (RFIs) as their applications are processed through the department in an online customer interface; 3) Enable automated emails (both to the applicant and within MNRD) as project and site information are updated or uploaded; 4) Create a library of fillable, Adobe forms, that will be used to initiate different project review modules in the WM&TS and any additional forms identified during in-progress reviews; 5) The staff interface must be configured in a manner that would allow MNRD staff members to submit RFIs to applicants and automatically notify applicants when RFIs that require their action are submitted 6) Establish a tracking and notification system within the WM&TS to help MNRD staff prioritize and complete tasks in a timely manner.

The scope of work for the project includes:

- 1) Work with the MNRD Environmental Specialist (and other staff, as appropriate) to plan and develop a cloud-based WM&TS to host the project review and approvals process, that will (in no particular order):
 - a. Contain two interfaces, one for applicants and one for the MNRD staff,
 - b. Require users (i.e. applicant and MNRD staff) to create a user profile and password to access the system,
 - c. Contain Adobe Fillable Forms, for internal and external use, that will facilitate various workflow modules and support the submission of applications
 - d. Assigns tasks and set deadlines for MNRD staff based on the information submitted by the applicant
 - e. Facilitate and enhance collaboration between various stakeholders in the MNRD,
 - f. Generate real-time, automated feedback, via email to the applicant when MNRD staff respond to information submitted,
 - g. Design an upload function through which the applicant can submit additional data,
 - h. Build and integrate an interactive web map, in a platform approved by the MNRD GIS Specialist, that allows the Tribal community to see where projects have been approved, with some basic metadata for each point,
 - i. Integrate specific MNRD permitting review processes, and
 - j. Automate tracking, notification, and alerts of project progress, and permit condition fulfillment,
 - k. Create an analytical function that can generate reports to quickly show all pending applications, average time of completion, where projects are in the workflow process and identify areas where projects are stagnate,
 - l. The platform should be easy to manage and update in-house and have minimal—if any—annual maintenance or licensing fees. The platform should be accessible through the Natural Resources page of the Tribe's official website (www.badriver-nsn.gov).

- 2) Integration of all previous and current Project Reviews, which are currently hosted in Microsoft Teams, into the new system. (As of 7/28/2020 this includes 125 Project Reviews.)
- 3) Conduct and record training sessions with MNRD staff on the use, management, and modification of the developed platform. Training may be conducted virtually, in-person, or both, and should include user manuals.
- 4) The contractor will meet with Mashkiizibii staff at least four (4) times to discuss the scope of the project progress, and review the final product. Meetings will be conducted using GoToMeeting during the COVID-19 pandemic, but may be requested in-person after travel restrictions are lifted. (Regular correspondence with the MNRD project lead is expected to occur between formal check-in meetings.)
- 5) Monthly progress reports to ensure deliverables are on-track. Monthly progress reports will be emailed to Mashkiizibii staff to solicit feedback and show progress.
- 6) The contractor will provide one year of beta testing and maintenance of the system from the time it is launched. MNRD would prefer to launch the system for public use in January 2021, but would like each bidder to provide a projected milestone timeline as part of the bid and propose an earlier launch, if possible.

Proposals are required to contain the following information:

- 1) A total cost of the proposed contractual services;
- 2) A cost summary of the proposed contractual services, which provides budget details broken down for each project deliverable based on the breakdown provided in the scope of work (above);
- 3) A proposed project schedule;
- 4) A demonstration illustrating how the company proposes to accomplish the request, including example(s) of similar project work previously completed. A 10-minute virtual presentation is also required at the Bid Opening; and,
- 5) Qualifications of the person(s) anticipated to be involved in the project.
- 6) The expected ongoing costs of the workflow system being proposed, including possible maintenance and licensing costs, if applicable.

The Bad River Band of Lake Superior Tribe of Chippewa Indians is a federally recognized Indian Tribe organized under Section 16 of the Indian Reorganization Act of 1934, U.S.C. Section 476. This entitles the Tribe to government pricing and exempts the Tribe from state sales and use taxes and from federal excise taxes. Therefore, price quotations should not include such taxes.

This Request for Proposals is open to all qualified, responsive bidders. Indian Preference will apply in the selection process in accordance with the Tribal Employment Rights Ordinance (TERO) or the Indian Preference Act of 1934 (Title 25, USC, Section 47), based on funding source requirements. Questions regarding TERO, and if the TERO fee applies to the RFP, may be directed to the Bad River Band's Human Resource office at 715-682-7111.

Firms or persons applying for Indian preference must provide evidence in its proposal of 51% or more Indian ownership. In addition, the firm or person must provide evidence of structure, management and financing affecting the Indian character of the firm. Documentation of and compliance with Indian Preference must accompany the proposal.

Sealed bids must be labeled 'WORKFLOW SERVICES FOR MNRD REVIEW PROCESSES' and submitted by ~~Friday, October 20, 2020 at 4:30pm~~ to: **Wednesday, November 4th, 2020 @ 4:30 PM**

Bad River Tribe
Chief Blackbird Center
Attn: Executive Secretary
PO Box 39/72682 Maple St

Odanah, WI 54861

Questions regarding this project can be directed to Jessica Strand, Environmental Specialist, at environmental@badriver-nsn.gov or 715-685-8860.

Friday, November 6 @ 1:00 PM

Bid opening is scheduled on ~~Tuesday, October 27, 2020 at 1:00 PM~~. As restrictions are still in place due to the COVID-19 pandemic regarding travel and/or access to Tribal Buildings, GoToMeeting information for the bid opening will be distributed to all those who submitted bids to allow for remote participation in the bid opening. Firms submitting bids must email Jessica Strand (see contact information above) no later than the close of the RFP to request GoToMeeting information.

Any or all bids may be rejected when in the best interest of the Bad River Tribe.

Program:	<u>\$ 9/23/20</u>
Accounting:	<u>PA</u>
Posted:	<u>9/24/20</u>
	<u>8:15</u> am/pm

Reposted 10/21/20

10/1/20

Follow-Up on RFP for a Workflow Management System for MNRD Review Processes

On 9/29/20, Mashkiiziibii Natural Resources Department (MNRD) staff received some follow-up inquiries regarding the above referenced RFP. These inquiries were to share copies of the forms that MNRD currently uses as part of their Project Review and permitting processes. Most of these forms can be found on our website (<http://www.badriver-nsn.gov/natural-resources/projectreviews/>), and the links are provided below.

1. Project Review Packet: http://www.badriver-nsn.gov/wp-content/uploads/2020/01/202001_NRD_ProjectReviewPacket-1.pdf
2. Project Review Response: See attached.
3. Access Permit: http://www.badriver-nsn.gov/wp-content/uploads/2019/11/TribalOps_NRD_AccessPermit_Form.pdf
4. Antidegradation Demonstration for ORWs and ERWs: http://www.badriver-nsn.gov/wp-content/uploads/2020/01/NRD_AntiDeg_ORW_ERW_Tier2_Tier2.5_2020.pdf
5. Antidegradation Demonstration for OTRWs: http://www.badriver-nsn.gov/wp-content/uploads/2020/01/NRD_AntiDeg_OTRW_Tier3_2020.pdf
6. Bad River THPO Section 106 NHPA Compliance On-Reservation Request for Review Form: http://www.badriver-nsn.gov/wp-content/uploads/2019/11/TribalOps_NRD_THPO_RequestforReview.pdf
7. Wetland and Watercourse Protection Ordinance Permit Application: http://www.badriver-nsn.gov/wp-content/uploads/2019/11/TribalOps_NRD_ElectronicWetlandApplicationForm_v.2012.pdf
8. Burning Permit: See attached

The above list of forms is not exhaustive, and other forms exist. These are examples for interested firms to use to understand how our process currently operates and to provide a refined bid for the RFP.

A staff directory for MNRD staff can also be found at our website, if firms are interested in seeing contact information for different Programs and staff. <http://www.badriver-nsn.gov/natural-resources/>

PROJECT TRACKING#/NAME: _____



PROJECT REVIEW - NRD FEEDBACK FORM

Bad River Tribal Access Permit Needed: Yes No (please contact DNRrecept@badriver-nsn.gov)

AIR	DATE REVIEWED:	STAFF INITIALS:
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Comments/Requirements:

BROWNFIELD	DATE REVIEWED:	STAFF INITIALS:
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Comments/Requirements:

CLIMATE CHANGE	DATE REVIEWED:	STAFF INITIALS:
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Comments/Requirements:

ENVIRONMENTAL	DATE REVIEWED:	STAFF INITIALS:
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Comments/Requirements:

FISHERIES	DATE REVIEWED:	STAFF INITIALS:
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Comments/Requirements:

FORESTRY	DATE REVIEWED:	STAFF INITIALS:
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Trust Land Harvest Permit Needed: Yes No
 Timber Harvest Plan Needed: Yes No
 Comments/Requirements:

GIS	DATE REVIEWED:	STAFF INITIALS:
Comments/Requirements:		
INVASIVE SPECIES	DATE REVIEWED:	STAFF INITIALS:
Equipment Inspection Needed: <input type="checkbox"/> Yes <input type="checkbox"/> No		
Comments/Requirements:		
POWTS	DATE REVIEWED:	STAFF INITIALS:
POWTS Application Needed: <input type="checkbox"/> Yes <input type="checkbox"/> No		
Comments/Requirements:		
REALTY	DATE REVIEWED:	STAFF INITIALS:
Comments/Requirements:		
THPO	DATE REVIEWED:	STAFF INITIALS:
Tribal Historic Preservation Office Review Needed: <input type="checkbox"/> Yes <input type="checkbox"/> No		
Comments/Requirements:		
WATER RESOURCES – WATER QUALITY STANDARDS	DATE REVIEWED:	STAFF INITIALS:
Antidegradation Demonstration Needed: <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Maybe		
Clean Water Action Section 401 Certification of Federal Permit Needed: <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Maybe		
<ul style="list-style-type: none"> Antidegradation demonstration forms are available for download from the MNRD website or can be picked up in the MNRD office: http://www.badriver-nsn.gov/natural-resources/projectreviews/. Please contact the Water Regulatory Specialist (WaterReg@badriver-nsn.gov or 715-682-7123 ext. 1548 cell 715-979-1370) to determine which demonstration (ERW/ORW or OTRW) needs to be filled out. Both actions involve 30-day public notice postings and approval by Tribal Council. Antidegradation demonstration forms should be returned to Lorrie Salawater, Water Regulatory Specialist, or 		

dropped off/mailed to the MNRD office.

Comments/Requirements:

WATER RESOURCES – WETLANDS

DATE REVIEWED:

STAFF INITIALS:

Bad River Wetland and Watercourse Protection Ordinance (WWPO) Permit Needed: Yes No Maybe

- Permit application is available for download from the MNRD website or can be picked up in the BRNRD office: <http://www.badriver-nsn.gov/natural-resources/projectreviews/> (Please note that we currently share a form with the Army Corps of Engineers, so it is their form on our website.)
- Applications should be returned to Shea Schachameyer, Wetlands Specialist: wetlands@badriver-nsn.gov, or dropped off/mailed to the MNRD office.

Site Visit Needed: Yes No

- Please contact Shea Schachameyer, Wetlands Specialist to schedule a site visit: wetlands@badriver-nsn.gov or 715-682-7123 x. 1602.

Comments/Requirements:

WILDLIFE

DATE REVIEWED:

STAFF INITIALS:

Comments/Requirements:

Comments provided by NRD staff are based upon the information provided by the applicant and NRD staff may reevaluate their comments if significant new information surfaces which was not considered in reaching the original decisions. Additionally, changes may occur that require the review to be modified (such as a new occurrence or listing of an endangered species). This review is only valid for three (3) years.

This is an initial project review form and additional information may be required from the applicant by NRD staff which may result in additional forms and/or applications needing to be completed by the applicant. Additionally, site visits may need to be performed by NRD staff, and though coordination will be attempted to limit the number of visits necessary, NRD staff may need to visit the site on multiple days.

The applicant is responsible for notifying NRD of any changes to the scope, intent, or execution of the proposed project or activity.

Failure to complete the Project Review Form, any additional reviews called for by NRD staff, or follow any other conditions placed upon the project or activity by NRD will result in enforcement action being taken under applicable Tribal Codes and Ordinances.

Bad River Band of Lake Superior Tribe of Chippewa Indians
Burning Permit

Type:	Address/ Location Description: _____
<input type="checkbox"/> Barrel Burning	_____
<input type="checkbox"/> Open Burning	_____

_____ is hereby authorized to set fire on that land owned or controlled by him/her as described above. Burning shall be limited under the restrictions outlined in Chapter 376 of the Bad River Conservation Code for the *Open Burning, Burn Barrel and Fire Prevention Ordinance*.

- 1) This permit is valid from ___ / ___ / ___ to ___ / ___ / ___. * Burn Barrel permits expire May 31 of each year. Open burns expire upon completion and in no case beyond 30 days from permit issuance. Refer to section 376.6 (a)10-11 and (b)8- Permitted Burning, for burning times.
- 2) No burning of materials outlined in section 376.7- Prohibited Burn Items.
- 3) Material to be burned _____.
- 4) Volume/quantity to be burned _____.

I hereby agree to use all possible care in setting fires under this permit and to be responsible for all damages done by such fires. *I further understand this permit is revoked upon violation of its restrictions. This permit is subject to ALL provisions outlined in Chapter 376 of the Bad River Conservation Code for the Open Burning, Burn Barrel and Fire Prevention Ordinance.*

Signature of person to whom permit is issued

Telephone #

Date

Authorizing agent

Telephone #

Date

If this permit is for a burn barrel:

I have performed an inspection of the burn barrel.

I have waived the inspection of the burn barrel pursuant to my authority under 376.4.

10/8/2020

Follow-Up (#2) on RFP for a Workflow Management System for MNRD Review Processes

On 10/6/20, Mashkiiziibii Natural Resources Department (MNRD) staff received a follow-up inquiry regarding the above referenced RFP. This inquiry asked how many MNRD staff would need to interact with the workflow management system (i.e., need a login and password). Based on this question we are providing the following additional details:

- We expect that 25 MNRD staff will need to be able to access the workflow management system at the beginning with a unique login in and password. However, as our Department continues to grow, this number may increase.
- We expect our customers (i.e., applicants) will have a separate interface for the workflow management system and need the ability to create a login and password for access to the site. We will need a lot of capacity on this side of the site as we expect that perhaps up to 100 customers a month might be accessing the site (both new customers and return customers).
 - One question that has arisen is how long the customer logins are good for, as some customers may never need to access the site more than once. We would like the system to be able to retire logins after a set period of time due to inactivity once a project has been closed out in the system.
 - Another aspect to keep in mind is that some projects may need to be accessed by more than one customer as oftentimes both a landowner and their contractor will need to access the site and submit/retrieve information.

In addition, we just want to include a reminder that all questions received on the RFP will be responded to in-writing to assure a fair and transparent bidding process. Also, any materials received electronically from any interested firms will not be viewed until the bid opening, and only sealed bids submitted as instructed in the RFP to the Tribal Secretary by the deadline will be considered.

Miigwech (thank you) for your interest.

~~10/8/2020~~ 10/20/20

Follow-Up (#3) on RFP for a Workflow Management System for MNRD Review Processes Updated

On 10/13/20, Mashkiiziibii Natural Resources Department (MNRD) staff received follow-up inquiries regarding the above referenced RFP. Please see below for the questions and their answers.

1. What is the current issue with your process in Teams? Is it a design problem? Scalability concerns?

- a. Our current process in Teams relies heavily on staff to constantly monitor, update, and follow-up on project reviews, processes that we believe could be automated for greater efficiency, saving both staff time and providing more frequent updates to applicants. Also, in Teams, there is not an easy tracking system that tracks all the various pieces of information. For example, it takes quite a bit of digging and possible back and forth with applicants and other MNRD staff to find out the answers to some of these example questions: Did the applicant follow-up on an information request? Which programs still need to issue permits under the different ordinances they are charged with for a project to proceed? Has the applicant submitted information required in a permit in the timeframe necessary?

We would expect the new system to do things like automatically confirm with an applicant that their application is complete and received, to let applicants know immediately if more information is requested from MNRD staff, to let MNRD staff know when the applicant uploads more information, etc. This will hopefully expediate the review process for projects by not relying on a single MNRD staff member to constantly check into and send out updates on Projects, or have the applicant waiting on all Programs to provide comments (which sometimes can span months), before hearing that one of the first programs to comment requires additional information to finalize their review.

2. Are you open to staying with Microsoft and moving to SharePoint?

- a. If an automated system with tracking abilities, online fillable forms, unique logins, and all our other requirements can be created with Microsoft, then we would be willing to use SharePoint or any of the other Microsoft Apps to make this happen. We already currently have SharePoint that we have linked to our Teams site, and access to other Microsoft Apps that work with these two.

3. Please provide additional context regarding Scope of Work Item #1, Letter H on page 1 pdf the RFP. Is this a must have item?

- a. **Yes. This is no longer an essential item when preparing a bid. We are willing to accept bids that do not include the web mapping option, especially since we expect bids to be itemized enough we should be able to compare costs between bids that include and do not include this item (as requested in the RFP). For firms that have the capacity to include this item, here is additional detail:** We want certain information about ongoing and upcoming projects available to the tribal community to maintain transparency on activities ongoing within the Reservation boundary. We want this information in map format so that if someone observes an activity taking place within the Reservation boundaries, they can access this resource to understand whether it is a compliant activity or not. Oftentimes, many of our reports of violations of tribal codes and ordinances come from concerned community members and this map would help them know whether they need to take the time to report something or not. This could be as simple as taking a couple of pieces of information from the submitted online application (location, type of project) and status of

Reposted 10/20/20.

the review then dropping a pin on a web map with that information. This could be a Google Maps interface, something ArcGIS Online, etc.

10/21/20

Follow-Up (#4) on RFP for a Workflow Management System for MNRD Review Processes

After the 10/20/20 update, Mashkiizibii Natural Resources Department (MNRD) staff received follow-up inquiries regarding the above referenced RFP. Please see below for the questions and their answers.

1. What does the MNRD want/or expect with the one year of beta testing?

MNRD expects the firm selected to include in their bid at least one year of support when the Management and Tracking System is launched to address needed modifications, address encountered errors, and make the tweaks necessary to ensure the product is functioning as expected.

2. Based on the fact that the postal systems have been functioning less than optimally because of the current COVID-19 pandemic, and that additional clarifications have been released by MNRD within a week of the original RFP deadline, the deadline for the RFP has been extended 10 days to Wednesday, November 4, 2020 @ 4:30 PM central time.

The bid opening will occur on Friday, November 6th at 1:00 PM central time. Please follow the instructions in the RFP if you wish to participate in the bid opening.

3. At this point, no additional questions will be answered if received after 12:00 PM (central) on Friday, October 23, 2020.