

**CHEROKEE NATION
REQUEST FOR PROPOSALS
PROFESSIONAL CONSULTING SERVICES
DIGITAL GOVERNMENT STRATEGY
ADDENDUM 01**



**CHEROKEE NATION
PURCHASING DEPARTMENT**

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PROJECT DESCRIPTION: The goal is to develop and deliver a coherent digital business strategy to deliver the customer experience that our citizens want. This system will digitize the Nation’s Government and be designed and operated to take advantage of digital data and technology to create, optimize and transform digital government services.

Goal or objective: Develop and deliver a coherent digital business strategy to deliver the customer experience that our citizens want, focus on three key areas:

- An end to end digital experience developed from the customers point of view, accessible anywhere, anytime and from any device.
- A unique, uniform digital ID that grants agencies and or departments access to the appropriate data and services.
- Mechanisms that allow departments to share data across the enterprise.

The goal of creating one seamless environment for a tribal government that still operates largely in silos, with limited cross-department governance.

Use customer personas and customer journey mapping to better understand the varied needs of the people who use its services.

Digital optimization - to enable the capabilities to use data to significantly improve what they are already doing. Digital transformation to provide potential new services and or capabilities.

MINIMUM QUALIFICATIONS (as stated in RFP): A section must be clearly indicated as “Qualifications”. For this project, a firm must have completed at least three (3) projects similar in size and scope in the last five (5) years. In this section, state the project, company size, timeframe of project, and contact name, phone number, and email for the company served.

The following questions were received by the deadline stated in the Request for Proposal.

GENERAL RESPONSIBILITY SECTION

QUESTION: The request requires our team to develop and provide a video. Can this be elaborated on?

RESPONSE: Disregard.

QUESTION: Who is the intended audience for the resulting application/service: Cherokee Nation officials only, citizens, or both?

RESPONSE: Both.

QUESTION: Which specific systems are used by the different departments involved (Salesforce, MS Dynamics, Google Cloud, AWS, Azure, etc.)?

RESPONSE: Among the systems currently in use are OneTribe, Eaglesun, and Salesforce. Proprietary internally-built systems are used for Tribal Registration and Tag Office. This is not an inclusive list and it is intended that this engagement will discover other data sources.

QUESTION: Are there restrictions on providers we can use to implement this?

RESPONSE: Include the information on any proposed provider in the proposal submittal.

QUESTION: What are the specific IT department requirements regarding information security, technologies, etc.?

RESPONSE: PII data is involved. No PHI data will be involved.

QUESTION: Are there any certifications required?

RESPONSE: No certifications are required.

Phase 1:

QUESTION: How many active assistance programs are there? How many departments are there?

RESPONSE: The exact number will be determined. Refer to the Cherokee Nation website www.cherokee.org for more information.

QUESTION: How much data is there to review and document?

RESPONSE: Unknown

QUESTION: Can you provide examples of the types of data sources currently in use?

RESPONSE: Microsoft SQL databases, Cloud data sources, and spreadsheets.

QUESTION: What is the sensitivity and privacy level of the existing data?

RESPONSE: Confidential. PII data will be involved, but no PHI data will be involved.

QUESTION: Will our team require training or certification to handle existing data?

RESPONSE: No.

QUESTION: What current security measures are in place to prevent unauthorized access?

RESPONSE: Role-based access permissions.

QUESTION: How is the current data accessed?

RESPONSE: Varies by data source.

QUESTION: What specific security frameworks or standards will guide the data security model?

RESPONSE: NIST standard applies.

QUESTION: How will access be managed and monitored across different departments?

RESPONSE: Role-based access permissions should be developed for anything that is developed and those will be managed within the Cherokee Nation IT department.

QUESTION: What software platforms and frameworks are currently in use by the Nation?

RESPONSE: Answered in previous question.

QUESTION: Is external access to the network and infrastructure possible?

RESPONSE: Yes, in joint sessions monitored by Cherokee Nation IT.

QUESTION: What level of access will we have to key CN IT staff throughout the project?

RESPONSE: Cherokee Nation IT will be actively involved.

QUESTION: What is the key output for the data in phase 1?

RESPONSE: Data Gathering.

Phase 2:

QUESTION: What specific roles will CN-IT have during phase 2?

RESPONSE: Cherokee Nation IT will provide oversight and input. Cherokee Nation IT can also provide assistance in development where it would be beneficial.

QUESTION: What is the current architecture of the system?

RESPONSE: Siloed data sources.

QUESTION: What preferred method do you have for citizen data entry (app, web, etc.)?

RESPONSE: Both.

Phase 3:

QUESTION: What types of reports and dashboards are required?

RESPONSE: Reports on citizen journey and dashboard. High level with ability to drill down to details.

QUESTION: Who should have access to these reports (specific roles or access levels)?

RESPONSE: To be determined at a later date by Cherokee Nation.

QUESTION: Should reports be differentiated based on user roles (citizens, officials)?

RESPONSE: Yes.

QUESTION: Is there a need for report download or export functionality?

RESPONSE: Yes.

QUESTION: Please clarify the breakdown of departments/services/programs to be assessed and that the vendor will meet with. Is this list correct

[\(https://www.cherokee.org/all-services/\)](https://www.cherokee.org/all-services/)?

RESPONSE: This will be formalized after award.

QUESTION: How many onsite meeting days do you anticipate by Phase (to determine travel allowance)?

RESPONSE: To be determined. Provide approximate cost for onsite meetings.

QUESTION: Can you estimate the current number of unique data sources?

RESPONSE: 50 - 100

QUESTION: Please provide a system architecture. And, as possible, identify which departments use which systems.

RESPONSE: Undetermined – full inventory of departments’ systems to be discovered during initial phase.

QUESTION: Is Salesforce or Microsoft more prevalent in the Nation’s current architecture? Is there a preference for the core platform moving forward?

RESPONSE: Salesforce is currently more prevalent.

QUESTION: What are the expectations for the overall timeline for performance on this engagement by Phase?

RESPONSE: Provide a general timeline estimate in the proposal based on information in the RFP.

QUESTION: Is there a budget allocated for this engagement? Please provide the budget or range.

RESPONSE: This information will not be provided. The Cherokee Nation is seeking competitive proposals. Funding is available to support this venture.

QUESTION: What are the Nation's primary goals for the project? What are the KPIs and success metrics for this engagement?

RESPONSE: Refer to RFP and Project Description. We want to better serve our citizens.

QUESTION: Is the external/web user experience to be assessed and improved as part of this engagement?

RESPONSE: Yes.

QUESTION: Are there new experiences you want to create and build out along with migrating existing systems to more modern ones?

a. For example, The process to intake citizen data and match to assistance programs - is this existing or new functionality?

b. Are there other new software components you're looking to implement?

RESPONSE: Yes. This will be a new functionality. New software components will be implemented in the future. See Project Description.

QUESTION: Are you looking to leverage AI in reporting or other uses?

RESPONSE: Yes, it is desired to leverage emerging technologies where possible, including generational AI.

QUESTION: Are you expecting that the selected vendor be able to implement any technology recommendations that come out of Phases 1 & 2?

RESPONSE: See Project Description. Guide implantation as stated in Phase 3.

QUESTION: Does the price estimate need to be presented as a separate document/attachment, or can it be included as part of the proposal document?

RESPONSE: Separate/clearly defined.

QUESTION: Please clarify what pricing must be included. Is a total project estimate range (Phases 1-3) acceptable? Is a Time and Materials proposal acceptable?

RESPONSE: Pricing per phase based on resources identified to deliver stated objectives, with high level timeline.

QUESTION: What is the preferred submission format (e.g., Word document, Powerpoint, etc)?

RESPONSE: Open to any format as long as one (1) USB is provided as outlined in RFP.

QUESTION: Do respondents need to meet insurance requirements prior to responding to the RFP or can they obtain insurance after award (and before work)?

RESPONSE: Include current COI with submittal.

QUESTION: What is the budget for this project?

RESPONSE: See previous response.

QUESTION: What is the preferred pricing structure for this project (e.g., time and materials, deliverables-based)?

RESPONSE: See previous response.

QUESTION: Is there an incumbent vendor or consulting provider?

RESPONSE: No.

QUESTION: What is the current state of the internal digital transformation and/or IT team (e.g., personnel, plans for hiring)

RESPONSE: To be determined. This is a new endeavor.

QUESTION: Does the nation have an existing systems integration (SI) vendor? Specifically, for phase 3, will the awardee manage an existing systems integrator, or provide direct development work?

RESPONSE: It is possible that an existing systems integrator could be used for later phases.

QUESTION: What is the timeline for the award?

RESPONSE: The Nation wants to move forward as soon as possible.

QUESTION: Would the nation accept a hybrid work model, with some work done in-person and some remote?

RESPONSE: Yes.

Phase 1:

QUESTION: Our understanding of “customer journey” is a specific department process or use case (E.g., tribal registration). Is this the correct way to think about the term?

RESPONSE: Yes.

QUESTION: What is the estimated number of “customer journeys” 1-20, 20-100, 100+ that will be digitized?

RESPONSE: Plan for 100+. Refer to previous response.

QUESTION: Has the Cherokee Nation performed any previous research that can be leveraged for this project? (E.g., digitization needs, citizen expectations, etc.)

RESPONSE: No.

Phase 2:

QUESTION: Are the integration points across systems known? (E.g., will there be required integration with the Cherokee Health System?)

- What are the known integration points? Or would this be defined in Phase 1?

RESPONSE: No. This would need to be defined in Phase 1.

QUESTION: There is no mention of solution prototyping in phases 1 and 2 to test idea concepts. Would you be open to design of digital tools and platforms during these phases to further refine the Phase 3 scope?

RESPONSE: Yes.

Phase 3:

QUESTION: Is there a desire to address all departments in parallel or can some be done in series?

RESPONSE: Combination may be possible.

QUESTION: Is there a hypothesis for which journeys to focus on first for digitization?

RESPONSE: The focus will be on the larger divisions first. Specific information will be shared with awarded party.

QUESTION: Are we focusing only on user journeys and data needs, or will there be back-office process optimization as well?

RESPONSE: There will be back-office process optimization.

QUESTION: Can you clarify the deliverable on “Develop reports, dashboards and actionable intelligence” on page 13? Is this primarily for the Nation to better understand how the citizens are using the services?

RESPONSE: Yes, this is to help the Nation better understand how citizens are using services.

QUESTION: What is the current state architecture?

RESPONSE: Answered in previous question.

QUESTION: What on-prem technologies are you using currently?

RESPONSE: Answered in previous question.

QUESTION: How many data sources are there currently looking to be integrated?

RESPONSE: Answered in previous question.

QUESTION: Are any data sources currently integrated and how much data is across them?

RESPONSE: Tribal Registration data is integrated with Salesforce.

QUESTION: Do any data sources have specific ingestion file format requirements?

RESPONSE: To be determined during engagement.

QUESTION: Are there any current data models being leveraging across system?

RESPONSE: No.

QUESTION: What tool are you currently using for reporting?

RESPONSE: No overarching tool is used. Each system has its own reporting mechanism.

QUESTION: How many reports need to be created or reproduced for implementation?

RESPONSE: Unknown: will be developed throughout project.

QUESTION: Are you looking for a cloud solution and do you have a preference for cloud vendor?

RESPONSE: Cloud solutions are preferable.

QUESTION: Is there a current security model in place?

RESPONSE: Answered in previous questions.

QUESTION: How was the application need to manage users, will different users have different access requirements?

RESPONSE: Yes.

QUESTION: How many different custom interfaces are you expecting in the application?

RESPONSE: Unknown.

QUESTION: What are systems we would be evaluating outside of Salesforce, Microsoft as stated in the RFP?

- Can you provide a list of them?

RESPONSE: This is a new project.

QUESTION: What are the downstream activities you would want to do with unified data outside of what is stated in RFP? (for example: marketing/engagement journeys, analytics dashboards, executive communications, reporting, etc.)

- Are there other use cases that you envision?

RESPONSE: Refer to RFP.

QUESTION: Is it safe to assume Data Cloud (Salesforce) will be the product we are to utilize for implementing in Phase 3?

- If so, is there a specific business value/ROI you are seeking to achieve with Data Cloud?

RESPONSE: This engagement should consider Data Cloud as an option and help us understand whether it is the best tool to use.

QUESTION: Are we also evaluating Cherokee Nation Health information/data? Or just Cherokee Nation Government services data?

RESPONSE: No regarding Health Information. Yes regarding Government Services.

QUESTION: How many parties will we be meeting with (how many groups of stakeholders)?

- If you can provide precise numbers of stakeholders, that will help us further refine our estimates.

RESPONSE: Unknown. Refer to the Nation's website for services offered.

QUESTION: What is your funding for each phase of this proposed project?

RESPONSE: See previous response.

QUESTION: Are there internal IT resources that would support this project?

RESPONSE: Yes.

QUESTION: “Design/Build process to intake citizen data and match citizens to recommended assistance”

- Can you expand on this bullet included in phases 2& 3? What is the vision of how to achieve this? Is this something you would seek recommendations around from the chosen vendor for this project?

RESPONSE: Seeking recommendations.

QUESTION: Do you intend to choose the same vendor for phases 1 - 3?

RESPONSE: Yes.

QUESTION: Given the quick turn around for this response. Can The Cherokee Nation allow for an email submission?

RESPONSE: Sealed proposals must be submitted as outlined in the RFP.

QUESTION: Aside from the required data listed, is there a specified format (e.g. MS Power Point, MS Word, etc.) requested for the body of RFP response, or can the bidder decide?

RESPONSE: See previous response.

QUESTION: Can you provide detail on the data types within the scope of the envisioned program - Citizen, HR, G/L etc.? Is any unstructured data with scope?

RESPONSE: Reference RFP. This will be determined, but primary focus is on the citizen and the Nation’s programs.

QUESTION: Will bidders be permitted to adjust pricing, if selected for consideration, if it is determined later that there are significant additional factors that were unknown at the time of the bid?

RESPONSE: If this should occur, there would an amendment to the agreement.

QUESTION: Are there any restrictions on the use of offshore resources?

RESPONSE: Yes, this is a federally funded project. The utilization of offshore resources is not acceptable.

QUESTION: Are key stakeholders located in a common location? Do you anticipate challenges with gathering key stakeholders in one location for face-to-face workshops and working sessions?

RESPONSE: A centralized location will be provided by the Nation.

QUESTION: Is pricing to be on a Time and Materials basis, Fixed Fee, or can the bidder decide?

RESPONSE: See previous response.

QUESTION: Is there a current Data Governance committee in place? If so, what is the membership like? We only need titles, names not necessary.

RESPONSE: A Data Governance committee is in development, with executive sponsorship from Cherokee Nation Secretary of State and leadership from the Chief Information Officer. This committee will have members across departmental leadership.

QUESTION: Are there any Data Scientists on staff currently?

RESPONSE: No.

QUESTION: What is the total number of resources currently performing data analytics functions?

RESPONSE: Unknown. Due to lack of data, function prohibited.

QUESTION: Has your organization had conversations across all data generating, consuming, and supporting departments? Do the key stakeholders have consensus on common challenges?

RESPONSE: No. The Nation is united in the need for this service to help our citizens.

QUESTION: Do you have a Chief Data Officer? This is a leader that is dedicated to the demands of new and existing analytics requirements, champions the use of data across the entire organization, and fosters a culture of data literacy and data governance. This individual would be an equal but separate peer to other C-Suite officers such as the CIO, CFO and COO. Typically, this is the executive "Owner" and "Leader" for a successful Data Governance Implementation.

RESPONSE: No.

QUESTION: What are the expected timelines of the project? Kickoff, assessment, development, implementation, etc.

RESPONSE: See previous response.

QUESTION: Do you have any guidance on your preferred method for the information/requirements collection effort? More specifically, can you provide an estimate of the number of stakeholders that must be included in the process?

RESPONSE: No.

QUESTION: What is the anticipated decision date for the RFP?

RESPONSE: See previous response.

QUESTION: When is the anticipated start date of the engagement? Is there an expected timeline for this work?

RESPONSE: See previous responses.

QUESTION: Is there a desired end date for the engagement based on strategic priorities?

RESPONSE: The Nation will take into consideration the timeline included in submittal.

QUESTION: What is the current status/view regarding cloud-based data management platforms?

RESPONSE: Cloud-based solutions are acceptable.

QUESTION: Does the scope include analysis of underlying infrastructure/hardware to support the required functions - both current and future state?

RESPONSE: Yes.

QUESTION: Do you have any IT component regulations and/or restrictions surrounding things such as public cloud usage, open source software offerings, etc.? If so, what are they?

RESPONSE: No, but any agreements entered into must honor Cherokee Nation sovereignty.

QUESTION: Are there any analytics tools that are used for central reporting across all entities?

RESPONSE: Provided in previous answer.

QUESTION: Would you be able to provide your security policy so that we can determine whether we can leverage our offshore resources as necessary for project development?

RESPONSE: See previous response.

QUESTION: Could you describe your EDW and Enterprise Data Orchestration Layer? Examples: Data Marts, ODS, CDR & etc.

RESPONSE: Not in this project. See Project Description.

QUESTION: Are there any MDM requirements? Deduplication of records prior to reporting needs?

RESPONSE: Not in this project. See Project Description.

QUESTION: What ETL tools are being used currently? How is data governance currently being integrated into the ETL process if any?

RESPONSE: Not in this project. See Project Description.

QUESTION: Are you currently performing any predictive analytics and prescriptive analyses?

RESPONSE: Not in this project. See Project Description.

QUESTION: Are there specific technologies, systems or reporting tools you intends to continue to use, stop using or start using for program?

RESPONSE: These decisions are subject to the findings of the engagement.

QUESTION: Have you identified the number of assistance programs that need to be accounted for in this project? If so, how many?

RESPONSE: No. See previous response.

QUESTION: How many departments are expected to be involved in the RFP during discovery and strategy conversation?

RESPONSE: To be determined.

QUESTION: Is there an overall timeline being sought for completion of the entire effort?

RESPONSE: No timeline determined.

QUESTION: Are there any specific technologies or platforms that CN prefers aside from Microsoft and Salesforce?

RESPONSE: No.

QUESTION: List of current software systems? Software System by Department if possible?

RESPONSE: To be determined as an output of this engagement.

QUESTION: What type of data exists in Salesforce and Microsoft data? Citizen, Assistance Programs, Department, etc.?

RESPONSE: Citizen and assistance application data.

QUESTION: What are the specific formats of the data in each of the Citizen and Assistance Program Data? Are there any other sets of data or data domains?

RESPONSE: Varies across systems and departments.

QUESTION: Are there any existing documentation relating to these data models or schemas for these data sources that can be reviewed?

RESPONSE: No.

QUESTION: Can CN provide more details on the existing technical standards and architecture of the current data source and associated applications. Per each source: Databases, environment, infrastructure, relational state of data

RESPONSE: No.

QUESTION: What is the estimated size of each data sources... Salesforce, Microsoft, others?

RESPONSE: No.

QUESTION: How many databases exist within the Microsoft environment and what versions of the database engine are in use for each?

RESPONSE: To be determined during engagement.

QUESTION: Can you list the applications currently utilized on Salesforce? Do any custom application exist on Salesforce and can you share descriptions or summaries of each and what data they interact with?

RESPONSE: 30 citizen assistance applications or surveys have been made available to citizens in Salesforce, with a primary focus on Human Services applications and Education programs (scholarships and housing assistance). Data collected in each varies.

QUESTION: Is there current integration between Salesforce and Microsoft data? What tools are used?

RESPONSE: No.

QUESTION: What services are utilized today to generate reports? How often are the reports refreshed with updated data?

RESPONSE: No current report. See Project Description.

QUESTION: Please describe the method of associating citizen to assistance programs today. Please provide the same information for other types of data matching that may be occurring.

RESPONSE: A method does not exist.

QUESTION: Can the department summarize the security protocols and access controls required with respect to the data? Does PHI exist?

RESPONSE: Answered in previous question.

QUESTION: Are there any specific regulatory compliance requirements for data handling and storage?

RESPONSE: Answered in previous question.

QUESTION: What level of detail is expected in the documentation of technical specifications, data mappings, and operational procedures?

RESPONSE: Detail should be sufficient to action upon in later phases.

QUESTION: How are changes to the project scope or technical requirements handled post-contract award?

RESPONSE: See previous response.

QUESTION: Is there a defined process for negotiating changes to the department's technical standards and architecture?

RESPONSE: Refer to Project Description.

QUESTION: What are the expectations regarding project management and progress reporting?

RESPONSE: Provide/propose information in submittal.

QUESTION: Are there any specific tools or platforms that the department prefers for project management and communication?

RESPONSE: Microsoft tools, including Teams for communications, are preferred but not required.

QUESTION: Can you describe current reporting services/software and a few report examples?

RESPONSE: See Project Description.

QUESTION: How many Assistance Programs are there? What Services, Software, or DB does this information reside in? Are there multiple locations?

Please provide any information available regarding the Assistance Program data source: DBs, Document, Currents Size

RESPONSE: See previous experience.

QUESTION: What type of training is expected for internal teams regarding the use and maintenance?

RESPONSE: Training is not in scope.

QUESTION: How many personnel will require training, and what is their technical proficiency or current skill set?

RESPONSE: See previous response.

QUESTION: What form of licenses and/or registrations are you referring to in item 2 of the RFP under "General Information"?

RESPONSE: Submit any licenses held by the organization in proposal. There are no additional certifications required.

QUESTION: Travel? Onsite? Requirements besides those specified for Discovery Workshops.

RESPONSE: See previous response.

QUESTION: Will an extension to the due date for the RFP response be considered to allow additional time to review answers to questions?

RESPONSE: Sealed proposals must be submitted as outlined in the RFP.

QUESTION: Can you confirm that the intent of Phase 3 is to perform the actual implementation or is the overall effort of the RFP strategy, planning and Design.

RESPONSE: The intent of Phase 3 is to develop strategy, planning, and design: collaboration to develop a RFP so seek the product/source for the implementation. See Project Description.