



AMERICAN INDIAN CHAMBER OF COMMERCE OF WISCONSIN

April 15-16, 2015 WisDOT/Tribal/Federal Business Development Opportunities & Resources
Orientation – Featuring Lac du Flambeau 2015 Infrastructure Projects Pre-Bid Meeting
Hosted by: Lac du Flambeau Band of Lake Superior Chippewa Indians
Sponsored by: The WisDOT Inter-Tribal Task Force
Final Report – 4/24/2015

Background:

The WisDOT Inter-Tribal Task Force (I-TTF) developed a Business & Labor Action Plan as part of the overall I-TTF Strategic/Operational planning process. The Business & Labor Action Plan established the goal to deliver several I-TTF workshop events throughout the year – among other products and services - designed to present information on topics including but not limited to:

- how to position qualifying businesses to capitalize on competitive advantages offered by programs such as the WisDOT Disadvantaged Business Enterprise (DBE) certification, and tribal preference/Tribal Employee Rights Ordinances, SBA HUBZone, 8(a), WOSB, SDV, as well as maintain compliance with these programs
- how locate local, state (including WisDOT), tribal and federal project opportunities
- how to build networks and be included in solicitation outreach with prime contractors - to facilitate access to project work by submitting competitive sub-quotes, and
- targeted technical assistance designed to contribute to reaching the status of being ready/willing/able to win, perform and profit from project opportunities.

The 4/16 workshop offering was viewed as being complementary and supplemental to the content presented at the annual I-TTF Wisconsin Tribal Transportation Conference (WTTC) Business & Labor track workshops – which is also an element of the Business & Labor action plan. In addition, the I-TTF Business & Labor action plan envisions possibly developing a stand-alone Native Business Development Summit during the off-peak construction season to make it convenient for business owners' participation.

Objectives of the workshop events – and other products/services - offered by the I-TTF, focus upon providing access to current and relevant information regarding the diversity of contracting opportunities throughout the state in various government market segments (i.e. getting work) as well as building awareness of and access to the broad range of business capacity building resources and support services for Native-owned businesses in Wisconsin.

During a regularly scheduled 2015 first quarter I-TTF Business & Labor sub-committee meeting Emerson Coy, Planner for the Lac du Flambeau Band of Lake Superior Chippewa (LdF) announced that he would be holding a pre-bid meeting on April 16, 2015 to present infrastructure projects (roads, buildings and utilities) planned to be let and completed in 2015. This event was intended to build awareness of and interest in bidding/quoting these projects – including information on the LdF tribal hiring/sub-contracting process. The LdF pre-bid meeting was intended to attract prime contractors, Native-owned businesses and local labor interested in competing for and working on these project. Widely advertising this type of event contributes to potentially increasing the number of qualified bids received and can contribute to more competitive pricing and quality project completion. Mr. Coy suggested that the I-TTF could use this opportunity to incorporate a broader statewide 2015 business opportunities and resources workshop at Lac du Flambeau.

The I-TTF Business & Labor sub-committee agreed that this would be an excellent time and venue to implement elements of its action plan, and work begun to plan and develop the **2015 WisDOT/Tribal/Federal Business Development Opportunities & Resources Orientation – featuring 2015 Lac du Flambeau Construction Projects.**

The Agenda:

The American Indian Chamber of Commerce of Wisconsin (AICCW) – which is an advisory member of the I-TTF – was asked to help coordinate the 4/16 LdF event in part for continuity and experience associated with assistance in coordinating the business & labor elements of the annual WTTC. Working in coordination with Emerson Coy, Agnes Fleming, I-TTF Coordinator, Kelly Jackson/Danielle Yancey, WisDOT Tribal Liaisons; eight (8) elements were proposed and agreed upon for the 4/16 agenda (see attachment one):

- 1) Lac du Flambeau pre-bid meeting (morning)
- 2) I-TTF sponsored lunch – with several brief overview presentations on the history/purpose/services of the I-TTF
- 3) Working with WisDOT – focusing upon DBE certification and payroll compliance
- 4) Working with Tribal Governments – focusing upon tribal hiring preference programs and TEROs as they impact prime and sub-contractors competing for tribal projects
- 5) How to locate and compete for WisDOT/Tribal/Federal projects
- 6) Native business/labor loan and financial technical assistance resources
- 7) Other business capacity building support services – WisDOT/Tribal/Federal

- 8) **Networking Opportunities** – Because it was anticipated that some people would be traveling 4/15 to participate in the 4/16 event, Emerson Coy arranged for a block of 25 rooms at the LOTCR. At the suggestion of several event planning committee members arrangements were made for an informal networking room beginning at 7:00 pm at the LOTCR Bad River room. Table tents were made identifying the key business development and resource organizations represented which were placed at tables around the Sokaogon room used for the 4/16 event. And, Mr. Coy added a more formal prime contractor ‘speed networking’ opportunity for both sub-contractors and participating TRANS students to meet with representatives of prime contracts at the event – held from about 11:15 – 11:45 am.

Targeted Participants/Evaluation Process:

Part of the reason for designing this agenda as a broad overview of, or orientation on statewide business development opportunities, resources and networking opportunities was that it was recognized that a key focal point and draw for the 4/16 event were the more than 10 2015 LdF infrastructure projects – estimated at some \$2,000,000 in contracting opportunities - which Mr. Coy scheduled 10:00 am to 11:45 am – i.e. people looking for contract work. As such, it was anticipated that a broad and diverse audience would be attracted to this event, potentially including:

- Area Prime Contractors/Professional Services businesses wanting to learn about upcoming project opportunities (vertical and horizontal given the diversity of projects being presented)
- Native owned businesses interested in sub-contracting opportunities and meeting participating primes (both NADBEs and non-certified firms)
- Area Native construction labor looking for work opportunities
- Other local small businesses looking for contracting opportunities
- Tribal program representatives
- Others?

This was the first time the I-TTF presented a workshop that included both a pre-bid meeting with complementary business development training topics so there were several unknowns such as how many people would be attracted, what percent of those attending the morning pre-bid meeting would stay for the lunch program and afternoon workshops, would attendees take advantage of networking opportunities, and how would the topics being addressed be viewed as relevant to the diversity of participants? Therefore, this event was treated as a pilot project to not only deliver statewide business development project opportunities and resources

but also to collect information from attendees that would be helpful to evaluation this delivery model and content.

To accomplish this data collection piece, it was decided to have attendees complete evaluations on each segment of the agenda to help organizers determine which topics were well received and justifying inclusion in future workshops and which were of less perceived value.

Presenters:

The workshop organizers were fortunate to get the cooperation and participation of key WisDOT, tribal and federal program representatives who serve as their respective programs point of contact and program managers/decision makers, including:

- SBA – District Deputy Director
- BIA – WI Tribal Roads Representatives Coordinator
- WisDOT – DBE Certification Program Central Office, Northwest and North Central Regional EROs, NW Tribal Liaison, and Tribal Affairs Liaison
- Ho-Chunk TERO program representatives
- TLAC coordinator
- WPI – WI’s only federally funded Procurement Technical Assistance Center
- GLITCI – Small Business TA program
- Two Native Community Development Financial Institutions – certified by the US Dept. of the Treasury

The intended attraction of including these individuals in the agenda was hopefully to draw additional attendees relative to taking advantage of the opportunity to meet face-to-face with these key state resource people.

It was also decided to use the no cost WPI’s workshop registration system for this event in part as a test of also using their outreach and distribution infrastructure to broaden marketing efforts.

Marketing/Outreach:

In the spirit of being a pilot program, a diversity of outreach techniques were used to build awareness of and interest in this business development event. Again, recall that the targeted attendees – given the pre-bid meeting – was diverse by design so various outlets were used to broaden outreach, as follows:

- **LdF Planner** – normal pre-bid outreach to area prime contractors/professional services firms & local ‘TRANS’ construction labor training program – Mr. Coy included the 2015 LdF project list in his outreach which was subsequently included in I-TTF outreach

- **I-TTF** – distributed workshop announcements to the I-TTF (with the request to forward) and to several available listservs from past I-TTF events & the I-TTF assistant distributed via social media outreach
- **AICCW** – distributed workshop announcements to NADBEs, other Native-owned business and membership lists, as well as resource partners, and posting on website
- **WTBA** – was requested to distribute the workshop announcement to their membership
- **WPI** – distributed workshop announcement through their statewide list of businesses interested in government contracting/procurement, and targeted regional outreach
- **Workshop presenters** were asked to distribute the workshop announcement to their respective networks/listservs but it is unclear if/who announcements when to from these sources.

When asked in the registration form “How did you hear about this event?” about 40% responded, with sources ranging from:

- ITTF/Agnes Fleming
- Emerson Coy/LdF
- AICCW
- WPI
- Ho-Chunk TERO
- Social Media (e.g. Facebook)
- Word of mouth

Outcomes:

Attendees:

A total of 47 people pre-registered via the provided WPI registration website link in for the 4/16 event, of which 45 or 96% were actually confirmed as being present. This is noteworthy as it is not uncommon for events like this to have more than 25% who register not actually show up for the event for various reasons. An additional 18 event participants were walk-ins (i.e. not pre-registered) making a total of 63 documented participants. In addition there were about 10 local LdF TrANS students (i.e. people being trained for the labor positions in the construction industry, two instructors that arrived just before lunch and were able to participate in the networking event with area prime contractors.

A total of 15 unique entity types were represented at the 4/16 LdF event (see list below), which can be grouped into the following categories:

- 1) 14 - Prime Contracting Businesses
- 2) 9 - Individual Native Owned Businesses
- 3) 8 - Tribal Enterprises
- 4) 2 – Small Business
- 5) 12 - Tribal Government
- 6) 6 - State Government

- 7) 2- Federal Government
- 8) 10 - Resource Providers

Summarized as 33 Business (prime/Native/tribal/small); 20 Government (state/tribal/federal), and 10 Resource organization (non-profit/tribal) representatives – including 12 presenters. The distribution of participants by type of business/organization is as follows:

- 9 Professional Services business representatives – (engineers, architects, developers)
- 9 Native-owned business representatives (truckers, HVAC, suppliers, general contractors)
- 8 Tribal enterprise/service representatives (general contractors, professional services, suppliers, transit)
- 6 Tribal labor/preference/TERO representatives
- 6 WisDOT representatives
- 5 Business Development Resource organizations (financing, procurement, technical assistance)
- 5 Prime contractor representatives
- 2 I-TTF representatives
- 3 Tribal roads representatives
- 3 Other Tribal program representatives
- 2 Federal government representatives (BIA & SBA)
- 2 area small business representatives
- 1 TLAC representative
- 1 THPO representatives
- 1 area college student

Evaluations:

As stated earlier the 4/16 WisDOT/Tribal/Federal Business Development Opportunities & Resources event was presented as a pilot so evaluations were requested from participants for each workshop element – with the exception of the:

- > 4/15 informal networking event (estimated to have had a mix of about 15 primes, native businesses, resource and government reps stop in to informally visit);
- > The morning LdF pre-bid meeting;
- > The pre-lunch prime networking event with Musson Bros, Marion, and Michels representatives generously providing nearly 45 minutes of networking opportunities for about 14 individuals – including area TRANS students; and the
- > WisDOT/I-TTF lunch program.

Following is the summary of the overall evaluation for the five workshop sessions presented in the afternoon of 4/16 – note that the LOTCR venue evaluations were consistently excellent:

- **Working with WisDOT/DBE Orientation:**
14 Responses – 72% Excellent / 21% Good / 7% Fair

Comments: Had a chance to speak 1-on-1, gave useful information that I can use while putting together my DBE application; Was very informative, good people, will be utilizing all of the information I received, thank you; This is a first time visit for me, very informational; Met some great people to network with; Whole thing overall was really good! Good job!

➤ **Working with Tribal Governments/TERO & Tribal Preference Program Compliance**

11 Responses – 64% Excellent / 27% Good / 9% Fair

Comments: Was very comfortable and very informative speakers; Need more time to be able to go into more detail; Seem like a short overview; Presenters need to know material and not read; Ho-Chunk presentation of TERO very interesting; I would like to see if further training could be provided with the Tribal and State representatives

➤ **Business Development Opportunities**

10 Responses – 60% Excellent / 40% Good

Comments: This one was great! Learned to navigate on the WisDOT page – can't wait to get in there; Was good – short but informative; Very interesting

➤ **Native Business/Labor Loan Opportunities:**

9 Responses – 56% Excellent / 44% Good

Comments: Very informative regarding finding a bank through the SBA – like the interest rates

➤ **Other Business Development Services:**

8 Responses – 50% Excellent / 50% Good

Comments: None

Note: Given the diverse audience not each topic was completely relevant to all attendees.

Lessons Learned:

By many measures – number of participants, diversity of businesses represented, event partners, networking opportunities – the 4/16 WisDOT/Tribal/Federal Business Development Opportunities and Resourced event was significant and worthy of examination as to what was learned when planning and delivering future I-TTF workshop events.

➤ **Aligning Tribal Infrastructure Projects pre-bid meeting with educational Workshops –**

Without a doubt most, but not all, of the business attendees were drawn to this event given the opportunity to learn more information on contracting and subcontracting opportunities – including some \$2,000,000 of roads, buildings, utilities and special projects - presented by Emerson Coy. However, a significant number of business representatives did stay for both the doing business with WisDOT and Tribes/TERO afternoon workshops and a surprising number stayed for the 2:15 pm statewide WisDOT/Tribal/Federal Business Development Opportunities session.

- **Key business development agenda topics and quality/relevant presenters** – Another draw for this event was having key WisDOT/Tribal/Federal program managers on the agenda presenting relevant topics, including the WisDOT DBE Certification program representative and NW region ERO; the SBA District Deputy Director, BIA Roads Coordinator, TERO and TLAC representatives among others.
- **Time in the construction season** – The mid-April timing of this event was just in time for businesses to explore additional project opportunities before the 2015 construction season went into full production.
- **Workshop partners/venue** – The two main sponsors and hosts of this event were the Inter-Tribal Task Force and the Lac du Flambeau Band of Lake Superior Chippewa. The Lake of the Torches venue and assigned event staff were excellent. Additional event planning, development and delivery support was provided by the American Indian Chamber of Commerce of WI and the Wisconsin Procurement Institute. This team approach did provide an opportunity to broadly market and promote this event which also contributed to increasing workshop participation.
- **Timing, length and sequencing of agenda** – The 10:00 am start-time was conducive to allowing participants to drive considerable distance in the morning to attend (e.g. several came from Oneida Nation in the morning). The prime networking event worked very well just before lunch – in fact, people continued networking meetings well into the lunch program. Essentially all morning participants stayed through lunch will provided a great audience for the I-TTF presentation. Relatively few people left for the day up to the 2:00 pm break, after which less than ½ of the morning participants remained, and rapidly reduced through the program close at 4:00 pm.
- **Opportunity for follow-up** – Understanding that this event provided the opportunity to really only introduce presenters and the topics covered, the event folders included a point of contact information sheet for each presenter to facilitate follow-up.

Next Steps:

- **Build upon success** – It is recommended that lessons learned from this event be built upon to refine and repeat similar events , perhaps regionally to include logical groupings of presentations or pre-bid meetings for tribal construction projects
- **Pre-bid meetings** – perhaps WisDOT personnel could facilitate an overview of how typical WisDOT project pre-bid meetings are managed and specifically examine mandatory WisDOT mega-project pre-bid meeting models to replicate

- **Timing** - Future Business Development Opportunities & Resources events could begin as soon as tribal roads, procurement and development staff are ready with to present funded/planned for construction season projects, coordinated with regional WisDOT, local/municipal and area federal projects - with the workshop condensed to a timeframe running from 10:00 am – 2:30 pm or no later than 3:00 pm – including a planned for speed networking event, again held just before lunch
- **Breakout rooms for 1-to-1 meetings** – It may be helpful to facilitate the opportunity for people to meet for more in-depth one-to-one meetings – perhaps including a scheduling process or sign-in sheet to pre-register for specific one-to-one meetings
- **Post event evaluation** – An interesting ‘value-added’ metric would be a post event follow-up questionnaire for both participants and presenters (e.g. for presenters, how many follow-up inquiries did they receive from the event; for tribes, how many new bids/quotes did they receive on subsequent project lettings, etc.)
- **Complementary Business Summit** – Given the limited time available at these orientation events will allow only overviews of subject matter, requiring individuals to follow up with identified points of contact for presented subject matter. Based upon event evaluations a longer (e.g. one and one-half day) Native Business Development Summit event may be considered during the construction slow season (e.g. late January or mid-February) allowing for high priority business development and management topics to be addressed in more depth. Perhaps the annual WTTCC Business/Labor track and these orientation workshops could be used to promote and provide overviews of topics to be covered in depth as the business summit event.