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**TAHOE REGIONAL PLANNING AGENCY
REQUEST FOR PROPOSALS (RFP)
RFP For Permitting Software
RFP 2100026**

Announcement: 8/4/2021 [\(revised 8/18/2021\)](#)

Project Description: Tahoe Regional Planning Agency Seeks Bids for Land Use Permitting Software

Questions: All questions should be submitted in writing to the RFP Coordinator no later than August 13, 2021

Ken Kasman
Tahoe Regional Planning Agency
kkasman@trpa.gov

Deadline: Submit proposals to bids@trpa.gov by close of business on [Wednesday, September 1, 2021.](#) ~~Friday, August 27, 2021.~~

BACKGROUND AND GOALS:

The Tahoe Regional Planning Agency (TRPA) strives to be a model of public service, with excellent customer service and fiscal efficiency. The Agency is committed to making its permitting and planning process for the Lake Tahoe Basin open, stakeholder-focused and results-oriented. To accomplish this task, a permitting software system is required for the submission, tracking, processing, and permitting of authorized structures and for the payment of fees.

Reduce Permit Data Entry Time- Current estimates are that TRPA staff spend an average of approximately 30 minutes on data entry per permit. We hope to reduce (or eliminate) this to less than 15 minutes.

Reduce Staff Preparation Time - TRPA staff spend between 30 and 60 minutes in preparation for daily travel and inspections. Through centralized storage of relevant documents, we hope to reduce this to 5-15 minutes.

Reduce Permit Review and Approval Cycle Time - Through integrated workflow, we will reduce the average turnaround time for all permits. Our goal will be to have no permits awaiting approval that are older than 120 days, unless the reasons for delay are outside the control of TRPA.

Improve Customer Service and Relations - Through simple, easy to use, guided (e.g., turbo-tax style) application processes, and live views of where applications are within the permit process for the public, we hope to improve our customer relations, increase transparency, and ensure permit processes are equitable and inclusive of underrepresented groups. This will include generation of permits within the permitting system itself, rather than manual creation outside of the system. Additionally, through app- or web-based services, we hope to be able to schedule inspections more efficiently. Creating understandable and processes that can be accessed through mobile platforms improves government transparency, and thereby accountability, and broadens the array of individuals that can easily do business with us. [e.g., https://www.urban.org/sites/default/files/publication/101360/technology_and_equity_in_cities_1.pdf].

TRPA has established memoranda of understanding (MOUs) with several local jurisdictions to perform some permit actions on TRPA's behalf. These MOU arrangements are beneficial both to the jurisdiction and provide a one-stop-shop the applicant to satisfy both the jurisdiction's and TRPA's requirements in one action. TRPA, too, is benefited by a reduced in-house workload. Currently, however, MOUs are operationally tedious for TRPA and the jurisdiction because records still must be exchanged in paper form: the jurisdiction makes an extra copy of the permit, and attendant documents as these evolve, which it delivers piecemeal to TRPA. TRPA re-enters facts about these permits into Accela after-the-fact and assembles a file with (portions of) the permit documents as best it can. We hope to streamline the flow of permit information from MOU partners through electronic data sharing.

OBJECTIVES:

TRPA is seeking proposals from qualified software providers/developers to provide customer-focused software solutions for the permitting of up to 2,000-3,000 applications per year, with dozens of different project types and associated fee schedules (including fee multipliers and variable fee types) with ability to update fee schedule easily.

The primary objectives of the program are as follows:

- **Application Volume** – TRPA will need to process applications for dozens of unique project types; the preferred solution will provide an easy-to-use, simple customer interface for customer account creation and maintenance, electronic application submittal (including e-signatures). Preferred solution will be interactive/guided, offer mobile-device options, and use a preferred payment vendor. E-signature authentication solutions are highly desirable. Software should have the ability to handle multiple plan revisions on projects and maintain hierarchy/linkages.
- **Application Review** - the preferred solution will provide easy-to-use tools and checklists for TRPA planners to review applications, provide the ability for planners to make internal (not for public view) notes and to make notes that are publicly viewable, and to document their decision making on system. A tracking system to record and report on the application of standard permit conditions (tied to specific threshold benefits). Interactive data entry forms for planners to record specific details of permit requirements (e.g., mitigation fee amounts) that are then populated onto the draft permit to avoid redundant data entry or transposing information.

The solution will also provide customers with the ability to pay electronically, check real-time status online, and to upload documents and other additional required materials including documents from prior projects, or to attach or associate to the applications electronically with the ability to handle multiple plan revisions. Projects should have streamlined and easy to follow workflows.

- **Email notifications** – the preferred solution will include tools for electronic mail, text, or app-based notifications to applicants, as well as internal notifications to planners when applications are assigned to them, or additional documents have been provided by the applicant. Additional requirements for email/text/app notification to applicants may include incomplete application notices, with requests for additional information, notice of permit approval/denial, and reminders for payment of inspection or mitigation fees. Integrated

communications tracking to record all application related correspondence and documentation.

- Integration with existing systems – the preferred solution should be able to integrate with TRPA’s existing software packages, including <https://laketahoeinfo.org>, MS SQL databases, BMP database, visual studio and ESRI ArcGIS package.
- Payment Processing – the preferred solution will be capable of invoicing required fees, processing credit card payments (3rd party CC processing is acceptable) and ACH/e-check for the payment of application fees, inspection fees, mitigation fees, security deposits, and any additional fees. Payment processing batch reports, verifications and audit controls are required. Payment processing must meet the SSAE 16 requirements for compliance controls. Support for automatically emailing customer receipts (instead of printing receipts). Support for entering, maintaining, tracking, and returning security deposits. Payment processing batch reports, verifications and audit controls are required. Integrated fee billing and receipts interfaced to the Agency's main accounting system (Springbrook).
- Automated permitting – the preferred solution will produce automated permits from the system with all required content from the application and review process transferred onto the permit. Once all the conditions of a permit have been met, the preferred solution will collect applicant signatures electronically, then produce and save a copy of the locked electronic permit record.
- Reporting – the preferred solution will have packaged reporting capabilities for the number and types of applications submitted, detailed application-specific information, and date-based workflow reports, as well as custom reporting capabilities. Robust reporting capabilities, including project tolling with pause/restart functionality, number and types of applications submitted, detailed application-specific reports, and date-based workflow reports, as well as custom reporting capabilities. Ability to create and perform automated tasks and reporting; web services or map services to feed real-time performance dashboards.
- Genealogy- Robust handling of parcel genealogy and parcel changes; easy to maintain and update parcel data (including parcel numbers, owner/address, etc.) when parcels are updated, while maintaining data connections to all associated prior projects.
- Web-based – preferred solution will include a web-based interface for remote access and connectivity for the processing and reporting of TRPA applications handled by TRPA or local jurisdiction staff under MOUs.
- Document security - security, controls, selections for public/private viewing, redactions, etc.; ability to store and access 100,000+ electronic documents.

- Field Inspectors - Support for field inspectors and mobile data entry via web interface or mobile application; online inspection scheduling capabilities and payment. Complaint and violation tracking and processing.
- Maintenance – the preferred solution will be easy to maintain and require minimal support from Information Technology (IT) staff to implement and maintain.
- Equitable Public Access - Robust public access to permit history and associated documents; application status reporting details, application submittal, document attachment and payment that is designed with social justice and equitable access in mind.
- “Agile” Design - the preferred solution will be developed with iterative testing and feedback from TRPA throughout the process. TRPA anticipates the development phases will occur beginning on/around October 2021, with final testing of the software solution and deployment to the public by the end of 2022.
- Hosting – if the preferred solution is cloud-based, the Consultant will arrange, in consultation with TRPA, suitable hosting for the production environment. Developed software should be portable to other hosting solutions.
- All proposals should include itemized costs associated with training, implementation and data/document migration from TRPA’s current Accela system. Robust data and document migration tools; established track record of migrating data from Accela Land Management platform and Documentum.

Proposals must clearly state any hardware specifications, application program interface (API) requirements, project management costs, file conversion costs, customization cost estimates, annual maintenance, and support costs.

FUNDING CONTINGENCY

Funding for this contract is contingent on current and future authorizations from the TRPA Governing Board and/or outside funding sources. If that authorization is removed or not renewed, this RFP and any associated contracts shall be of no further force and effect. TRPA will promptly notify Consultant and issue a stop work order. In this event, the TRPA shall have no liability to pay any funds whatsoever to the selected Consultant or to furnish any other considerations under the contractual agreement and the Consultant shall not be obligated to perform any provisions of the contractual agreement from the date of the stop work order. TRPA will reimburse Consultant for expenses incurred up to the issuance of the stop work order.

EXPECTED REQUEST FOR PROPOSAL SCHEDULE (Subject to change):

Date of Announcement:	Wednesday, August 4, 2021
Deadline for Questions	Friday, August 13, 2021
Questions and Answers posted to www.trpa.gov	Wednesday, August 18, 2021 Monday, August 16, 2021
Deadline for Proposal Submissions:	Wednesday, September 1, 2021 Friday, August 27, 2021
Sealed Proposals Opened:	Thursday, September 2, 2021 Monday, August 30, 2021
Consultant Interviews and product demos (if necessary):	September 6- 17 10 , 2021
Contract Award Notification:	Wednesday, September 15, 2021
Commencement of Work:	October 2021
Iterative/AgileSoftware Design:	October 2021 to November 2022
Final Testing:	November 2022
Release to Public for Applications:	December 2022

Late proposal submissions will not be considered and will be returned unopened to the sender.

Please include a contact name and phone number with your proposal. The contact should be able to be reached September 6-~~17~~ ~~10~~, 2021 to provide product demos, conduct finalist interviews, and in case of additional questions.

ADDRESS ALL PROPOSAL RESPONSES TO:

Proposals must be submitted electronically. Electronic submittals and supporting documentation (Microsoft Word or PDF) must be marked “**DO NOT OPEN – Permitting Software RFP Response**”

Address proposals to: bids@trpa.gov

All proposals and accompanying documentation become the property of TRPA and will not be returned. Any late proposals will not be considered.

Duplicate hard copies of the proposal may be mailed to (but are not necessary):

Tahoe Regional Planning Agency
Attention: Ken Kasman
Research & Analysis Division Manager
Physical Address (FedEx/UPS Delivery):
128 Market Street

Mailing Address (US Mail only):
P.O. Box 5310

All mailed proposals must be submitted in a sealed envelope plainly marked “Permitting Software RFP Response” and “DO NOT OPEN – Sealed Bid Enclosed,” name and contact information of bidder, and addressed to the attention of Ken Kasman, Research & Analysis Division Manager.

Minimum Required Proposal Contents:

1. Definition of the Project: Indicate your understanding of the objective of the software requirements.
2. Specifications: Indicate how the proposed software solution will meet the specifications that are desired as part of this RFP.
3. Detailed Schedule and Cost: State the ability of the contractor to meet the required date for development, testing and deployment of the software. All proposed tasks should be itemized.
4. References: Please provide a table listing references with current phone numbers.
5. Contracting Requirements: Consultant must provide copies of the insurance documents required per Section 2.10 of the Standard TRPA Two-Party Consultant Services Agreement (<https://www.trpa.gov/wp-content/uploads/documents/archive/TRPA-Standard-Two-Party-Contract-%E2%80%93-Updated-7-16-19.pdf>)

PROPOSAL QUESTIONS

Upon release of this RFP, all communications concerning this proposal request should be directed to the RFP Coordinator listed below. All written questions and requests for clarification must be received by the deadline on the RFP schedule listed above. Email shall have the subject stating: “RFP INQUIRY – Permitting Software Response.” Responses will be posted to the website <https://www.trpa.gov/contact/request-for-proposals/> in accordance with the RFP schedule listed below. The respondent should rely only on written statements issued by the RFP Coordinator.

Ken Kasman
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NOTIFICATION, SELECTION, AND CONTRACTING PROCESS:

The process for selecting the Applicant is as follows:

1. Evaluation criteria will include content of the proposal, ability to meet objectives and specifications, references, cost, and timing.
2. Contract. All successful consultants will be asked to enter into the Standard TRPA Two-Party Consultant Services Agreement listed on <https://www.trpa.gov/wp-content/uploads/documents/archive/TRPA-Standard-Two-Party-Contract-%E2%80%93-Updated-7-16-19.pdf>
3. TRPA agrees to make a good faith effort to contract with small, minority, and women owned business enterprises. Accordingly, the TRPA strongly encourages small, minority, and women owned businesses to reply to this RFP and submit DBEWE Certification as an attachment to this RFP.

If an insufficient number of proposals are received in response to this RFP, or if the selected contractor(s) and TRPA are unable to agree to the terms of the master services agreement contract, TRPA reserves the right to disqualify the contractor(s) and select other qualified contractor(s) or reissue the RFP in whole or in part.

OTHER DETAILS:

FOR QUESTIONS:

TRPA Contact: Ken Kasman at 775-589-5253 or kkasman@trpa.gov.

TERMS AND CONDITIONS

- TRPA reserves the right to amend the RFP schedule or issue amendments to the RFP at any time. TRPA also reserves the right to cancel or reissue the RFP, to reject any or all proposals, to waive any irregularities or informalities in the selection process, and to accept or reject any item or combination of items. TRPA reserves the right to request clarification of information from any bidder or to request supplemental material deemed necessary to assist in the evaluation of the proposal. TRPA reserves the right to accept any agreement deemed by the agency to be in its best interest. This RFP does not obligate the TRPA to accept or contract for any expressed or implied services.
- In the event that the bidder to whom any services are awarded does not execute a contract within thirty (30) calendar days after TRPA approval, TRPA may give notice to such bidder of intent to award the contract to the next most qualified bidder or to call for new proposals and may proceed to act accordingly.

- TRPA will not reimburse any bidder for any of the costs involved in the preparation and submission of responses to this RFP or in the preparation for and attendance at subsequent interviews.
- Bidder shall thoroughly examine and be familiar with these terms and conditions. The failure or omission of any bidder to receive or examine this document shall in no way relieve any bidder of obligations with respect to this proposal or the subsequent contract.
- Bidder must certify to the best of its knowledge and belief that it and its principals are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from covered transactions by any federal department or agency. TRPA will verify bidders' status by checking the SAM system.
- Selected consultant(s) will be expected to sign the TRPA Consultant Services Agreement listed on <https://www.trpa.gov/wp-content/uploads/documents/archive/TRPA-Standard-Two-Party-Contract-%E2%80%93-Updated-7-16-19.pdf>. Any desired edits to this agreement shall be included in the Contractor's proposal. Desired edits may not be accepted by TRPA.
- All subcontractors, if any, used by the selected consultant will require prior written consent of TRPA and will be subject to all provisions stipulated in the TRPA Consultant Services Agreement.