TAHOE REGIONAL PLANNING AGENCY

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

Important Note

Due to the higher than expected number of questions and TRPA's delay in posting these Questions and Answers to the website, the **deadline for RFP submittals has been extended to Wednesday, September 1, 2021.** Here is the revised RFP schedule:

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
Deadline for Proposal Submissions:	Wednesday, September 1, 2021
Sealed Proposals Opened:	Thursday, September 2, 2021
Consultant Interviews and product demos (if necessary):	September 6-17, 2021
Contract Award Notification:	Wednesday, September 22, 2021
Projected Commencement of Work:	October/November 2021

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

Submittal Deadline: Submit proposals to bids@trpa.gov by Wednesday, September 1, 2021, close of business.

Questions and Responses – Posted 8/18/2021

Q1. Project Budget: Can TRPA share the budget for this project? How did the agency establish the budget for this project? Please share any specifics or general information pertaining to this budget. Is this project dependent on funding from the American Rescue Plan?

A1. TRPA has not formally set a budget for this project, in part so that we can explore all available options that best meet our needs and requirements without setting any cost barriers. As described in the RFP, funding for this contract is contingent on current and future authorizations from the TRPA Governing Board and/or outside funding sources. If a contract is awarded from this RFP, we anticipate that sufficient funding

will be secured prior to the initiation of a contract. We do not anticipate seeking funding from the American Rescue Plan, though we may pursue any available funding sources including federal and state options and the use of agency reserves, as necessary.

Q2. Current Software: Today, TRPA is using Accela's software for what the RFP is requesting. Can you provide the current Accela version or other specifics? What is the renewal date for the Accela contract? What version of the ESRI ArcGIS Package are you running today? Are you using the Intuit Platform for any business applications?

A2. TRPA is currently using Accela Civic Platform Version 19.2.3. We use the Accela inspector and Accela wireless through the Accela gateway for field inspections (Accela inspector app and Accela code officer app). For GIS, due to compatibility concerns with Accela, we use currently use ArcGIS Server 10.8 to power the map services for Accela GIS (our preference would be to run the latest available versions of ArcGIS Server and Portal, currently version 10.9). TRPA uses Accela Document Services (ADS) for document storage. Our current support contract with Accela runs through June 30, 2022. We do not currently use Intuit; the Agency's main accounting system is Springbrook.

Q3. RFP Requirements: Will Code Enforcement be part of this solution (or Building & Planning only?) The Tahoe Regional Planning Agency (TRPA) is specifically asking for Permitting and Planning in the RFP. Would there be any current or future need(s) for additional "typical" Community Development / Land Management components, i.e., Code Enforcement or Business Licenses / Business Tax Renewal(s)? Do you have a requirements matrix for the desired system? Does TRPA require both Permitting & Inspections AND Planning workflows, or only Permitting & Inspections? Do vendors have to meet all of the RFP requirements or is there an opportunity to focus on individual parts of the RFP as a separate application or platform?

A3. We need in code enforcement and permit/field inspection tools, in addition to building and planning. TRPA's current planning division is responsible for permitting land use activities (residential, commercial, public service, etc.) in the Tahoe region, either directly or through the delegation of permitting to local jurisdictions. For more information, please visit the "permitting" tab at https://www.trpa.gov/. Current planning also includes the TRPA code compliance team, whose staff visits work sites and inspects projects, and responds to complaints regarding code violations, ensuring the conditions of the permits issued by TRPA or through delegation are met. The long-range planning and transportation division primarily keeps the regional plan and the regional transportation plan up to date. The division focuses on TRPA plan amendments, development and refinement of policies, and modifications to TRPA rules and regulations to meet the dynamic needs of the Tahoe environment.

Unlike some community development organizations, TRPA does not typically process applications with more than one staff member or division. Applications are usually processed by one application, one planner. So, options for concurrent/multi-departmental review are not required for this project. TRPA does not require modules for licensing or tax collections, fire/water, engineering.

TRPA may award contracts to one or more vendors through this RFP, and we will consider separate parts of the RFP where appropriate, such as a Pre-Permit Guide, Electronic Document Review, Electronic Signature tool, and other potential areas. Ideal solutions in these areas will be those that integrate successfully with other systems, to create seamless and easy-to-use tools (for customers and agency staff) that can pass

information back and forth between the tools, so that users do not have to re-enter information in either system.

Q4. Mooring Permitting Software: TRPA released a similar RFP for Permitting software in 2018. Did TRPA implement a Permitting solution as a result of the original RFP? If so, can you disclose which product/ vendor you decided to proceed with?

A4. Yes, TRPA contracted with Sitka Technology Group to develop a custom, purpose-built permitting and registration application for moorings (https://parcels.laketahoeinfo.org/MooringRegistration/Welcome) that was integrated into the Lake Tahoe Info platform. All registrations for existing moorings are processed through this system, including reviews, permitting, signatures, and registration payments. As part of the mooring workflow, the mooring system automatically inserts a record for each new mooring permit into TRPA's Accela permitting system via a GovXML connection. Permits for new moorings are processed in Accela.

Q5. Demos: Prior to the issuance of this RFP, has the Agency had any product demonstrations or cost proposals for either your current vendor, or other permitting and planning vendors? If so, what systems have been evaluated? How much time will be allotted for demonstrations? Who will be in the audience for demonstrations?

A5. As described above, TRPA issued an RFP in 2018 for permitting software for a mooring permitting and registration system. TRPA received nine sealed bids for that RFP, including bids from Accela Inc., CitizenServe, ETech Consulting, idtPlans LLC, Sitka Technology Group, Spatial Infomatics Group (SIG), TruePoint Solutions, Tyler Technology, and Visionary Integration Professionals (VIP). The agency received product demonstrations from Visionary Integration Professionals (VIP)/SimpliGov Automation Platform and CitizenServe as part of the final selection process for that RFP. In addition, in July 2021, TRPA staff received a demonstration of Camino's Applicant Guide tool. In the past several years, TRPA staff have evaluated several standalone electronic document review tools and electronic signature tools, but none have been fully demoed or purchased.

A cross-divisional committee of TRPA staff, including members of the current planning, research and analysis, and long-range planning divisions will review the submissions to this RFP, and will likely participate in interviews and demonstrations of potential products. Additional interviews and/or demonstrations may be scheduled with technical staff from our IT, Finance, GIS, and Research and Analysis teams as necessary to ensure compatibility with TRPA systems and integration potential.

Q6. Document Management: Does the agency currently store documents on local document storage solution such as SharePoint or LaserFiche? If so, would the Agency entertain the concept of integrated the current storage to new solution to limit the storage of documents in the new system? Will TRPA retain the Documentum system, or is the intention that the new Permitting System will provide this functionality so that Documentum may be retired? Can you provide additional detail relating to the data/document migration requirement?

A6. In our current Accela system, we have approximately 200,000 CAP records. Overall, we uploaded tens of thousands of documents to the Accela Document Server, usually with multiple documents for each CAP

record. We also have other items, such as inspection photos and correspondence records that are associated with CAP records. In addition, we have historical records (pre-2007; before TRPA installed Accela) that are stored in a Documentum database.

Our preference would be to migrate all these documents from their respective locations into a unified document management solution -- either as a standalone system or an integrated package -- that would replace all these prior systems. We would also prefer to migrate all our existing CAP records into the new system, if feasible, and if all existing information (application-specific details, inspections, securities, etc.) can be maintained.

We currently use Microsoft Office 365, and we do have access to SharePoint through that subscription, but we do not currently use SharePoint in that manner.

Q7. Certificate of Insurance: Is the Certificate of Insurance required at time of submittal or not until award/prior to project start?

A7. The Certificate of Insurance is required as part of the contracting process. It is not required at the time of submittal, but if it is not provided upfront, it could delay the contracting process. If the terms of a contract cannot be reached, TRPA may withdraw the vendor selection and award the contract to the next most qualified bidder or call for new proposals.

Q8. Application Types: Do you have a complete listing of all permit and application types and a published fee schedule?

A8. The TRPA Application list is available at https://www.trpa.gov/applications-forms/ and the fee schedule is available at https://www.trpa.gov/wp-content/uploads/FILING_FEE_SCHEDULE.pdf.   There are approximately 60 different types of applications currently in Accela, with 37 available for online electronic submission through Accela Citizen's Access (https://aaweb.trpa.org/CitizenAccess/Default.aspx).

In the past 12 months, TRPA processed more than 1,000 project applications and more than 1,800 administrative files (correspondence, tree removal authorizations, qualified exempt declarations) in Accela. Application fee collections through Accela for TRPA's Fiscal Year 2021 (ended June 2021) exceeded $2 million.

Q9. Electronic Documents/Review: Does the solution need to provide redaction capabilities, or is it sufficient to store the redacted copy? Do TRPA users have access to Adobe Acrobat Professional? Are you looking for Electronic Plan Review to be included? Does the Agency currently use an electronic plan review (EPR) software or system?

A9. TRPA staff currently have access to versions of Adobe Acrobat Pro (X and DC) for document viewing and redacting confidential information. We do not require the software to redact information natively.

Our preferred solution would include options for electronic plan review, markup, comparison, e-stamping, measurement, and other integrated tools; we do not currently use electronic plan review software.

Q10. E-Signature: Does the system need to integrate with any signature pads dedicated hardware (e.g. Topaz signature pads) or would a software-based solution be enough (e.g. draw the signature on screen using a finger/pen/mouse, depending on the type of device)?

A10. We do not have any existing hardware for signature collection; a software-based solution would be acceptable.

Q11. Project Timeline: Are you open to an earlier go live date or are you set on end of 2022?

A11. Yes, we are open to an earlier go-live date if all the requirements of the project (configuration, data migration, document management, training, etc.) are ready to go.

Q12. Memoranda of Understanding (MOU) Partners: Can you expand on the case scenario for the flow of permit information between TRPA and MOU partners? Would a solution where the MOU partners had limited access to the same solution be advantageous? If so, would TRPA "manage" the oversight, security configurations, etc. of these users as TRPA external staff members? Would access via the online portal or eGovernment solution be satisfactory? How many MOUs are there? Either local jurisdictions or number of MOU staff?

A12. Depending on a property's location and the scope of a project, permits may be processed by TRPA or the local building department. TRPA has Memorandums of Understanding (MOUs), with five of the local jurisdictions within the Lake Tahoe Basin (City of South Lake Tahoe, CA, Douglas County, NV, El Dorado County, CA, Placer County, CA, and Washoe County, NV). There are typically several staff members at each local jurisdiction who process TRPA permits. For more information, please visit https://www.trpa.gov/wp-content/uploads/documents/archive/MOU-Permitting-Table_060616_PUBLIC-WEB-VIEW_FINAL.pdf.

Each of the local jurisdictions uses its own permitting software to process these applications. In most cases, TRPA receives a regular report from the jurisdictions on their permitting activity (usually an excel file produced from a packaged report in their system). However, a direct connection between systems, and/or providing MOU partners access to log into the same solution via an online portal would be preferred, so long as it would not require MOU partners to re-enter information into both systems (e.g., their own system and TRPA's system). TRPA staff would be open to managing users in this manner.

Q13. Number of Users: What is the total named user count required for the new solution? How many named users will need to access mobile inspection capabilities? How many users will require access to markup tools for plan reviews?

A13. TRPA currently has 50 named users in our Accela system. Of these users, we have 10 mobile wireless users and 5 current IPAD users for inspector apps. If an electronic plan review tool is provided, we would likely need 10 named users to have plan review access. If the proposed solution includes access for MOU

partner staff (see MOU Partners, Q12), then the user counts would increase by approximately 10 named users.

Q14. On-Prem or Hosted: Does the TRPA prefer an on-prem or hosted solution? In a hosted solution, do you still require integration with MS SQL databases, BMP database, visual studio? Our solution is hosted on the Microsoft Azure Government cloud. Does TRPA have a specific preference to where the solution is hosted, and is the Azure Government cloud acceptable?

A14. TRPA does not have a preference for on-prem or hosted. We currently use a managed service provider for IT support, so if proposals will require TRPA to provide hardware/IT support, proposals should include detailed hardware requirements and estimates for the time/expertise required for installation and maintenance, including upgrades. Our preferred solution would provide TRPA users (and potentially MOU partners) with easy access to the system from both inside and outside the TRPA office (i.e., not require a VPN connection, if possible). TRPA's staff will need to have access to the master parcel data to provide batch updates as needed to parcel shapes, attributes, addresses, and ownership.

If a hosted solution is proposed, the proposal should include a discussion of the data integration options, web services, and tools (e.g., API), and any existing documentation for access to backend data tables for programmatic access (e.g., from https://Parcels.LakeTahoeInfo.org) to read/display real-time information from the permitting system, reporting, finance reports, and other similar actions (see Data Integrations, Q21)

Q15. Parcel Genealogy: Regarding parcel genealogy, is this something that's needed in the application or if this genealogy can be provided as part of an integration with the ArcGIS parcel data store. Please clarify if GIS will be used as the definitive version of addresses and parcel numbers. Or, a separate address database will be provided. Can TRPA provide additional clarification regarding the handling of the parcel genealogy requirement and how they envision this will be managed within the permitting platform?

A15. TRPA is a regional agency; our jurisdiction covers portions of two states, six counties, and one incorporated city. Each local jurisdiction has its own GIS/Assessor systems of record for parcel and owner information. These sources are updated regularly. Currently, twice a year TRPA collects parcel information from each of the local jurisdictions and we create a combined ArcGIS parcel layer for the Tahoe region using their definitive information. It is common for parcel numbers to change. Our preferred solution would be flexible to track parcel number changes and their history (splits, mergers, parents, children) in an agile manner so that records that are associated with obsolete parcel numbers are not lost and record connections are maintained, and records are associated to the current parcel numbers.

Q16. Accela: Regarding the current Accela, the RFP states that the proposal should include any costs for the "data/document migration from TRPA's current Accela system". Will the application replace Accela? Is a mandatory upgrade (technology upgrade or SaaS) of your current product(s) requiring your agency to go through the RFP process? Is the intent for this RFP to find a replacement for Accela or is TRPA open to re-configuring and integrating Accela with other tools to meet your objectives? Is TRPA & their staff generally satisfied with the current permitting and planning software you are using? Is TRPA & their staff satisfied with the current customer support of your permitting and planning software? What are the deficiencies in Accela that led to this RFP?

A16. TRPA has used Accela for over 12 years. When this system was originally configured and installed, the Agency opted for a lot of customization to make it work for the needs of the Agency. Much of this customization now creates challenges for TRPA to upgrade, maintain, and reconfigure the system.

TRPA is generally satisfied with the current system. However, there are several preferred tools described in the RFP that TRPA is not currently using or able to use without reconfiguring our system. TRPA would prefer easier admin tools, integrated electronic document review, more seamless reporting, updated/streamlined workflows, project tracking and reporting tools, automated emails, auto-generated correspondence and permits, improved payments receipting and financial, and dashboards for the public to track the progress of their applications more easily.

Proposals may include the full replacement of our Accela system or could include the reconfiguration of it. We are not opposed to such an effort but have opened the RFP to all prospective software platforms, including Accela so that we can ensure that our selection best meets the agency's needs.

Accela support has improved over the years, however, TRPA has had to retain a third-party contractor (TruePoint Solutions), at an added cost, to provide faster resolution to many problems.

Q17. Payment Processing: Who is your Merchant Services for credit card payments provider? Is this Merchant Services Provider the same for both counter traffic and web/online payments? Are you planning to use the same payment processor for online payments through the new system or are you requiring the solution to include a new payment processor? Regarding SSAE16 compliance, our system is fully integrated with Stripe payment system; is a specific payment processor required, please identify the system.

A17. We currently use Elavon and TSYS as our 3rd party processor credit cards and electronic checks. TSYS has been our processor of choice, but we are also open to First Data, Clearent, and Card Connect among other vendors. We do not have relationships with Stripe. Please provide a list of credit card processors you can integrate with. TRPA will maintain control of selecting and managing our credit card processor. Systems that only interface with a single processor may create additional transaction fees that will be incorporated in our price analysis. Bids should include the costs associated with account setup, payment processing, and other administrative costs based on TRPA's existing processors.

Q18. Springbrook: Regarding integration with the Springbrook accounting system, it's unclear at this point what's required from such an integration but from what we've seen Springbrook has a pretty well documented API. It would be great to get further clarification on what the integration actually is required (e.g. what data needs to be sent to Springbrook, when does this need to happen, etc.).

A18. TRPA would like to maximize the integration of the permitting software with our Springbrook accounting system. Direct transfer of data between systems is the most efficient, secure, and least costly process from our standpoint. As a minimum, the permitting software should be able to download a file in .csv or excel format that can be imported into Springbrook with a minimum of reformatting and manipulation. The primary need is to transfer cash receipts into a Journal Entry, but additional project management opportunities to track project payments is also desirable. A robust system that integrates with multiple accounting packages is even more desirable if we ever decide to change our accounting system.

Q19. Security Deposits: Can you please explain in more detail about security deposits and how you handle them?

A19. When TRPA issues a conditional permit, often a security deposit is required to ensure they will comply with the requirements and special conditions of the permit. These security deposits need to be tracked in the permitting software on the file which requested the deposit. TRPA tracks the date submitted, type of deposit, payment method, name and mailing address of the person posting the deposit, name and mailing address of the person to return the deposit to, and the purpose of the security, along with a free-text notes field.

Security deposits may be taken in as cash, check, certificate of deposit, hold on account, assignment of account, letter of credit, or a bond (though, TRPA may limit the types of securities in the future).

When all of the conditions of the permit have been satisfied, and the project construction is completed, TRPA will release the security deposit back to the applicant, and the record is updated with the transaction details that reflect that the deposit was returned and all TRPA actions on the project are completed.

Q20. Total Population: What is the total population served by the TRPA?

A20. The Lake Tahoe region, and TRPA's jurisdiction, covers over 500 square miles. Approximately 90% of the land area is held by the USDA Forest Service and various other state and local entities. Approximately 50,000 people live in the Region.

Q21. Data Integrations: Regarding Integration with existing systems, the list of services to integrate with is very broad. Can you please provide some information on the types of integrations that is envisioned for each of those systems and to define the scope of those integrations. Regarding Reporting, RFP states web services or map services for real-time performance dashboards but it's unclear if these dashboards should be part of the app or if they need to integrate with some other dashboard generating service (e.g. if we need to just provide the data via web service APIs or if you want the dashboards to be part of the application).
Can you please describe the interfaces you are requiring with your MS SQL databases and BMP database? What are these systems used for in relation to the land use permitting software? Would you require a one-way or two-way interface? What kinds of data would be passed between the systems? Would you be able to clarify the integrations TRPA is seeking for this project? Are these integrations hoping to be via an API structure? Real-time? One-way? Bi-directional? Simply providing links or documents, etc.? Any information you can provide will be greatly appreciated.

A21. TRPA created the Parcel Tracker (https://parcels.laketahoeinfo.org) to make this information more accessible to TRPA/MOU partner staff and the general public, as the Accela Citizen's Access portal is too complex and difficult to navigate for most users.

In the current Accela environment, TRPA uses a GovXML connection to pass parcel information (from Parcel APO; address/owner, etc.), CAP record information (description), and attached documents from Accela to the Parcel Tracker. Through this GovXML connection, the Lake Tahoe Info system creates and modifies Accela records and updates project workflows/status. Other information is sourced from TRPA's GIS systems (https://www.tahoeopendata.org/, including planning areas and zoning/density requirements. The Lake Tahoe Info platform (and Parcel Tracker) offer outbound web services in both tabular and geospatial formats.

As described in the RFP, TRPA is interested in a simple, easy-to-use, guided (e.g., turbo-tax style) application process. Using the tools that TRPA has developed in the Parcel Tracker and GIS data layers, we would prefer to have applications auto-fill using these services, where possible.

TRPA prefers to maintain the Lake Tahoe Info/Parcel Tracker tools going forward, independent of the selected permitting software. To do so, similar programmatic access (API, XML, etc.) is preferred to provide read/write access (or read-only access if necessary) to the information stored in the system, including parcel address/owner information, record details, attached documents, etc.

In addition, TRPA is interested in the ability to create automated dashboards for reporting, including real-time dashboards for the volume and types of applications and aggregated review times, as well as the ability to show real-time project status, project tolling, and date-based workflow reporting. These dashboards may be part of the proposed solution, or data could be provided as a web service, so that dashboards may be developed by TRPA staff using other data visualization software.

Q22. Automation: How many different permit types need to be set up for automated permitting? How many standard conditions need to be configured, how different are these permit types are in terms of fields, conditions etc. Please clarify this requirement: A tracking system to record and report on the application of standard permit conditions (tied to specific threshold benefits).

A22. Ideally**,** the preferred solution would enable automated permitting for each application that is offered in the system. There are approximately 60 different types of applications currently in Accela, with 37 available for online electronic submission through Accela Citizen's Access. However, 15 application types comprise more than 90% of the submitted applications, so if we could automate the most common applications at a minimum, that would be preferable. Each application type and permit have different standard conditions and data requirements that need to be identified and scoped to ensure that TRPA's reporting and data collection needs are met. Overall, there are approximately 200 standard conditions that would need to be accommodated in the system.