

**TAHOE REGIONAL PLANNING AGENCY  
REQUEST FOR PROPOSALS (RFP)  
Records Digitization  
RFP#220018**

**Announcement:** October 17, 2022

**Project Description:** The Tahoe Regional Planning Agency (TRPA) is seeking a qualified consultant to digitize paper records. This multi-year project will scan agency records and create permanent electronic files. The project also includes an optional task for data entry. By converting records to electronic format, the agency can better support public records requests and facilitate staff remote work.

**Evaluation:** Proposals will be evaluated based on cost and qualifications via the process described in the RFP. Interviews may or may not be conducted depending on the quantity and/or quality of bids received.

**Questions:** All questions should be submitted in writing or email to the RFP Coordinator:

Jeanne McNamara  
Tahoe Regional Planning Agency  
PO Box 5310  
128 Market Street  
Stateline, NV 89449  
[jmcnamara@trpa.gov](mailto:jmcnamara@trpa.gov)

## 1. INTRODUCTION & AGENCY BACKGROUND

### **Introduction:**

The purpose of the Request for Proposals (RFP) is to select a consultant to provide the Tahoe Regional Planning Agency (TRPA) with scanning of paper records. This multi-year project will scan these records and create permanent electronic files. TRPA estimates that it has more than 200,000 older, hard copy agency records, documents, and permitting records for land use activities in the Tahoe Region that are difficult for the public to access and are currently only available in paper form.

Document sizes include, but are not limited to, 8½" x 11", 8½" x 14", 11" x 17", 18" x 24", 24" x 36", 30" x 42", 36" x 48", and other odd sizes. These will require black and white scanning as well as some color or grayscale digitization. Files may contain photos that will need to be digitized. The contractor should note that some records date back to the 1970s and may be 50+ years in age. Documents may contain printed or handwritten text, both single/double-sided, folded, stapled, wrinkled, and faded pages.

The deadline to submit proposals is Monday, November 9, 2022, at 5:00 p.m. Pacific Time. Consultants will be contracted through the TRPA Consultant Services Agreement. This is an ongoing multi-year project and Year 1 funds have been received. The initial contract agreement will be one-year and may be extended if additional funding is secured.

### **TRPA Background Information:**

TRPA was created when the governors and lawmakers in California and Nevada approved a bi-state compact that created a regional planning agency to oversee development at Lake Tahoe. In 1969, the United States Congress ratified the agreement and created the Tahoe Regional Planning Agency. The Agency is authorized under California law (California Government Code sections 66800 through 66801), Nevada law (NRS 277.190 through 227.200), and Federal law (PL 96-551).

TRPA is located on the border of the states of California and Nevada, between the Sierra Crest and the Carson Range. Approximately two-thirds of the region is in California, with one-third within the State of Nevada. The Tahoe Region contains an area of about 501 square miles, of which approximately 191 square miles comprise the surface waters of Lake Tahoe. Overlapping jurisdictions in California include the City of South Lake Tahoe, El Dorado County and Placer County. Overlapping jurisdictions in Nevada include Washoe County, Douglas County and Carson City. Tourism is the economic heartbeat of the region and visitors to the area far outnumber the year-round resident population of just over 55,000 people.

The mission of the TRPA is to "lead the cooperative effort to preserve, restore, and enhance the unique, natural, and human environment of the Lake Tahoe Region." The Agency is the leading partner for plans and actions to preserve the environment of the Tahoe Region. The Agency establishes transportation and land use policy. It works with local, regional, state, and federal organizations and governments to facilitate a cooperative approach in implementing these plans and programs.

TRPA is governed by a 15-member Board. California and Nevada each have seven members comprised of elected officials and governmental appointees. In addition, a non-voting member is appointed by the

President of the United States of America. Further information can be obtained at the Agency's website at [www.trpa.gov](http://www.trpa.gov).

For more than 50 years, TRPA has managed growth and development in the Lake Tahoe watershed through a unique transferable development rights system that limits and meters out residential, commercial, and tourist (hotel/motel) units. Additionally, TRPA controls the amount of impervious land surfaces (commonly called land coverage) in the Tahoe Region, including all human-made structures such as homes, driveways, and parking lots.

As a result, TRPA has amassed more than 200,000 paper records, documents, and permitting records for land use activities in the Tahoe Region, either directly or through delegation of permitting to local jurisdictions. Not having these documents readily available causes delays in providing property owners with relevant documents for their properties in the basin. TRPA's review of project applications requires a full review of the history of each parcel to determine what can and cannot be permitted and to ensure environmental protections. Access to records is also an equity concern, as currently, members of the public must travel to/from the TRPA office during business hours to be able to view these records.

## 2. RFP Schedule & Submission Process

### **PUBLIC RECORDS**

The documents submitted in response to this RFP should be considered public information and subject to FOIA disclosure. Restrictions on any information submitted will render a bid non-responsive.

TRPA assumes no contractual obligation to enforce any exemption on behalf of a respondent to the RFP.

### **RFP COORDINATOR:**

Upon release of this RFP, all communications concerning this proposal request should be directed to the RFP Coordinator listed below. All questions and requests for clarification must be received via email by the deadline on the RFP schedule listed below. Email shall have the subject stating: "**RFP INQUIRY – RFP#220018 Records Digitization.**" 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.

Jeanne McNamara  
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128 Market Street, Suite 3A  
Stateline, NV 89449  
[jmcnamara@trpa.gov](mailto:jmcnamara@trpa.gov)

### **REQUEST FOR PROPOSAL SCHEDULE:**

TRPA anticipates the following schedule, which is subject to change:

Date of Announcement:	October 17, 2022
Proposing Firms' Questions Due:	October 28, 2022
Questions and Answers posted to <a href="http://www.trpa.gov">www.trpa.gov</a>	November 2, 2022

Deadline for Proposal Submissions:	November 9, 2022, 5:00 p.m. Pacific Time
Sealed Proposals Opened:	November 10, 2022
Consultant Interviews (if necessary):	November 16 to November 18, 2022
Anticipated Award of Contract:	November 29, 2022
Commencement of Work:	December 19, 2022

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

**PROPOSAL SUBMISSION:**

Proposals must initially be submitted electronically to [bids@trpa.gov](mailto:bids@trpa.gov). Electronic submittals and supporting documentation in PDF format must be emailed with the subject line “**DO NOT OPEN – RFP#220018 Records Digitization**” to [bids@trpa.gov](mailto:bids@trpa.gov).

All opened proposals and accompanying documentation become the property of TRPA and will not be returned. Late proposals will not be reviewed.

**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.
- Selected consultant(s) will be expected to sign the TRPA Consultant Services Agreement listed on <https://www.trpa.gov/contact/request-for-proposals/>. Any desired edits to this agreement should be included in the Contractor’s proposal. Desired edits may not be accepted by TRPA.
- The Consultant or its employees may be subject to the provisions of Article III (a)(5) of the Tahoe Regional Planning Compact (P.L. 96-551, 94 Stat. 3233, Cal. Gov’t Code Section 66801, N.R.S. 277.200), which requires disclosure of any defined economic interest and prohibits such persons from attempting to influence Agency decisions affecting certain economic interests.
- Bidder shall thoroughly examine and be familiar with these terms and conditions of the TRPA Consultant Services Agreement. 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.

- 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.
- This contract will be funded by federal and state grant awards and is subject to federal and state grant award requirements including, but not limited to, cost principles and administrative regulations including but not limited to travel and per diem rates, mileage rates, and allowable cost requirements.

### 3. Project Description

#### Overview of Project

The Tahoe Regional Planning Agency (TRPA) is seeking a qualified consultant to digitize paper records. This multi-year project will scan agency records and create permanent electronic files. By converting records to electronic format, the agency can better support public records requests and facilitate staff remote work.

1. **Objectives.** TRPA has approximately 200,000 older, hard copy agency records, documents, and permitting records for land use activities in the Tahoe. TRPA and property owners rely on the thousands of paper records and agency documents that are housed at TRPA's office to conduct their daily business and make key decisions. TRPA expects the proposed project to be a multi-year initiative to scan and digitize these agency records and create permanent electronic files. This project may also include the associated data entry and geographic information system (GIS) data creation to digitize the development rights and land coverage information stored in these records for agency and public use.
2. **Background.** Document sizes include, but are not limited to, 8½" x 11". 8½" x 14". 11" x 17", 18" x 24", 24" x 36", 30" x 42", 36" x 48", and other odd sizes. These will require some black and white scanning as well as color or grayscale digitization. Some project files may contain photos that will need to be digitized. The contractor should note that some records date back to the 1970s and may be 50+ years in age. Documents may be printed or handwritten text, both single/double-sided, folded, stapled, wrinkled, and faded.
3. **Scope.** TRPA requests competitive bids for the following services:
  - a. Document imaging/scanning services for large and small documents which include, but are not limited to, building plan sets and drawings, maps, compliance documentation, permit files and plans, maps, and other various large format documents.
    - i. Identify file format(s) for saving and document search capabilities.
    - ii. Identify how imaging and quality assurance will be provided for every document.
    - iii. Specify process for transportation of plans and documents to be scanned. TRPA may require documents to be returned so the process should outline this option.
    - iv. Develop tracking systems to identify records that are in contractor's possession and logging systems to connect digital scanned documents to these records.
    - v. Provide processing and completion timelines.

- vi. Indicate type of repairs that may be necessary to address imperfections to create a high-quality image.
    - vii. Outline methods for how digitized files are transferred back to TRPA.
    - viii. Determine file disposition/destruction plans for scanned records that have been verified to be complete, accurate, and legible through QA/QC.
  - b. Provide itemized project costs for scanning services, transportation, materials, shipping, and any other direct and indirect costs and fees. Indicate the basis for costs such as hourly, per document, or other cost basis.
  - c. Optional tasks:
    - i. Data entry to record the development rights and land coverage information stored in these records.
    - ii. Geographic information system (GIS) data creation to be uploaded to the TRPA GIS network.

**4. Responsibilities:**

- Conversion of these documents to a digital format will occur exclusively at the contractor's facility. TRPA will not provide scanning equipment.
- The contractor is responsible for pick-up of document boxes to TRPA's office in Stateline, Nevada.
- The documents will be scanned into a PDF/A archival format at a resolution that supports full text search and is clearly legible. The scanned documents must be made searchable by various criteria and clearly legible.
- Once the contractor has received the documents from TRPA, they are responsible for their safekeeping until returned to TRPA.
- Contractor must ensure that all writing on scanned documents be legible if the writing is legible on the original document. Vendor must add a disclaimer cover page for poor original quality document.
- For the first set of files given to the contract, the contractor must prepare test sets of scanned documents prior to full scanning of all the files to validate the process and deliverables.
- All documents provided to the contractor for scanning must be considered confidential. The vendor must demonstrate its ability to maintain this confidentiality during all phases of the scanning process.
- File pages shall be scanned in the order they are given to the contractor. Note that some pages within files will be double-sided while others will be single-sided. The proposal shall include a process for how to deal with these instances.
- Paper records will be provided to the contractor in banker boxes. The records may contain paperclips, staples, post-its, and pages may be hole punched. Proposals shall identify how much preparation will be required by TRPA or if the bids include this work being performed by the contractor. It is understood that paper clips, staples, and other items removed during the scanning process will not be reattached to their original location.
- File folders will contain a variety of page sizes.

- 5. Schedule:** The contractor shall provide a schedule for pick up of file boxes. The contractor shall also provide a time frame as to when records will be scanned from the pick-up date.

## 4. Minimum Required Proposal Contents

All proposal responses should address the following matters:

1. Definition of the Project: Indicate your understanding of the project purpose, objectives, and desired outcomes. Max page limit: 2
2. Project approach: Describe how the project will be managed, implemented, and evaluated to accomplish the objectives and requirements outlined in this request. The proposal should identify the proposed digitization method(s) and provide a discussion of the rationale for selection of the method(s), and the benefits of using the proposed method(s). Max page limit: 4.
3. Team Organization: Describe how the project team will be organized to facilitate effective management, implementation, and evaluation. Max page limit: 1
4. Qualifications and Experience: Provide a summary of company and project team qualifications related to the work. Max page limit: 3
5. Schedule and Cost: The initial term of this contract shall be for one (1) year, with an option to extend as additional funds are secured. Provide an itemized cost estimate based on the Tasks described in Scope of Work section. If there are volume discounts, please disclose those rates and volumes in the proposal. Max page limit: 2
6. References: Provide a minimum of three (3) client references of similar sized and/or governmental accounts which the bidder has served in a similar capacity over the past two years and/or is currently serving. Provide a description of work performed, contact person, telephone number, and email address for each reference customer. References should be submitted as an attachment to this response. Max page limit: 3

## 5. Notification and Selection Process

### Review of Proposals

After the deadline date the Agency shall review and evaluate all proposals for responsiveness to the RFP in order to determine whether the Proposer possesses the professional qualifications necessary for the satisfactory performance of the services required. The Agency shall also investigate qualifications of all Proposers to whom the award is contemplated, and the Agency may request clarifications of proposals directly from one or more Proposers. In reviewing the proposals, the Agency may consider the following:

1. The experience and past performance of the Proposer and its agents, employees, and sub-consultants in completing projects of a similar type, size, and complexity.
2. The Agency may consider Proposer's timely and accurate completion of similar projects within budget.
3. The specific recent experience of the Proposer and its agents, employees, and sub-consultants in auditing governmental entities and especially transportation entities.
4. The feasibility of the proposal based upon the performance and cost schedules, and the methodology to be used by the Proposer.
5. Proposer's understanding of the work to be completed based upon the clarity of the proposal and responsiveness to this RFP.
6. Proposer's proposed language for the Professional Services Agreement.
7. TRPA makes 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.

Section	Evaluation Criteria
1. Definition of the Project	<ul style="list-style-type: none"> <li>• Demonstrates exceptional knowledge of the overall goals and objectives</li> </ul>
2. Project Approach	<ul style="list-style-type: none"> <li>• Overall project approach including overall project approach including role, philosophy, and project process used by the Proposer. Overall strategy and deliverables.</li> </ul>
3. Team Organization	<ul style="list-style-type: none"> <li>• Project team and leadership. Planning activities, support tools, and reporting methodology.</li> </ul>
4. Qualifications and Experience	<ul style="list-style-type: none"> <li>• Depth of relevant experience, verifiable ability of proposed firm to meet Agency expectations.</li> </ul>
5. Schedule & Cost	<ul style="list-style-type: none"> <li>• Acceptability of proposed overall cost and specific cost formulation the Agency.</li> <li>• Availability and accessibility of the firm during the duration of this project.</li> </ul>
6. References	<ul style="list-style-type: none"> <li>• Satisfactory responses from prior engagement references provided for proposed firm.</li> </ul>
7. Content	<ul style="list-style-type: none"> <li>• Satisfactory completion of all general RFP content and submission requirements.</li> </ul>

### **Award of Agreement**

Upon completion of the review period, the Agency shall notify those respondents whose proposals will be considered for further evaluation and negotiation. All notified respondents may be required to make presentations and negotiate in good faith in accordance with direction from the Agency. Any delay caused by respondent's failure to respond to direction from the Agency may lead to a rejection of the proposal.

If the Agency determines, after further evaluation and negotiation, to award the Agreement, the Standard TRPA Two-Party Contract Agreement shall be sent to the successful respondent for the respondent's signature. No proposal shall be binding upon the Agency until after the Agreement is signed by duly authorized representatives of both the Auditor and the Agency.

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.

Should the selected applicant and TRPA be unable to agree to the terms of a contract within thirty (30) calendar days after TRPA approval, TRPA will reserve the right to disqualify the consultant and select another qualified applicant. Should this process not result in the hiring of a consultant, the RFP may be reissued.

The Agency reserves the right to reject any or all proposals, and to waive any irregularity. The award of the Agreement, if made by the Agency, will be based upon a total review and analysis of each proposal and projected costs.



TRPA will contract with the party that will best accomplish the project objectives for the best value and in the best interests of the Agency.