

County of San Mateo

Request for Proposals (RFP) for Accela Implementation and Maintenance Support Services

Planning and Building

RFP No. PLN24-0109

Date issued: Tuesday, January 9, 2024

Pre-Proposal conference: 1:00 p.m. PST on Tuesday, January 16, 2024 Questions due: 1:00 p.m. PST on Thursday, January 18, 2024 Proposal due: 3:00 p.m. PST on Tuesday, February 6, 2024

RFP Contact: Ellie Dallman, Administrative Services Manager

edallman@smcgov.org

Request for Proposals No. PLN24-0109 for Accela Implementation Support Services

Appendix:

- Minimum Qualifications Checklist County Contract Template Fee Proposals A.
- B.
- C.
- Reference Template D.
- Technology Security Assessment Optional with RFP submissions E.

I. Introduction and Schedule

A. General

The County of San Mateo (the "County" or "SMC") covers most of the San Francisco Peninsula. The region covers 744 mi² and is home to nearly 800,000 residents and 20 incorporated cities. The County provides for the health and welfare of all people within its borders and serves as the local government for the unincorporated areas. Innovation thrives here in industries including bioscience, computer software, green technology, hospitality, financial management, health care, education and transportation. The County prides itself on how that prosperity fosters its commitment to protecting and enhancing the health, safety, welfare and natural resources of the community.

The San Mateo County Planning and Building Department ("Department") implements local land use plans and development regulations that protect public safety and contribute to healthy and prosperous communities. Currently, the Department's customers apply for Planning and Building permits by visiting the public facing counter, submitting applications by email, or applying directly online via the Accela Citizen Access (ACA) portal.

In 2013, the Department implemented an externally hosted Accela Automation database in order to calculate and invoice fees, route project applications through various regulatory agencies, and track workflow throughout the permitting process. The Department has recently completed an expansion of its ACA capabilities by providing applicants with the ability to complete all aspects on the building permit application process online. The Department is now seeking to develop the same capabilities for its planning permits, and to continue to build on the improvements that have been made to all aspects of its online permitting systems. This planning permit upgrade will complete the transition to fully online permit applications, and will streamline the submission, review, and processing of planning permit applications.

Accordingly, this Request for Proposals (RFP) No. PLN24-0109 seeks an experienced provider that is adept at designing and delivering online Accela permitting systems; supporting staff in their use of these and other integrated systems; and implementing upgrades to these systems that increase the efficiency and effectiveness of electronic permitting procedures. It is anticipated that this RFP will result in multiple contracts, including a contract for the planning permit design upgrade project and a contract for ongoing maintenance and support services.

The contracts shall have an original term of up to 3 (three) years. In addition, the County shall have one (1) option to extend the term for a period of two (2) years each, which the County may exercise in its sole, absolute discretion.

The County's standard contract template has been included as Appendix B to this solicitation. The awarded contractor(s) will be expected to sign an agreement prepared by the County using this template. Please ensure that your firm has completed legal review of these contract terms. If your firm wishes to request exceptions to these standard terms, submit a contract exceptions request by the deadline for questions, comments and contract exceptions listed in the solicitation schedule below. The County will consider contract exceptions requests but reserves the right to reject requested modifications to its standard terms.

B. Solicitation Schedule

RFP Released	January 9, 2024, PST	
Pre-proposal meeting	January 16, 2024, at 1:00 pm PST	
	Register in advance for this webinar: https://smcgov.zoom.us/webinar/register/WN_FV_fqwkvTBiAW5Q1orYg7w	
Deadline for Questions, Comments and Contract Exceptions	January 18, 2024, 1:00 p.m. PST	
Proposal Due Date and Time	February 6, 2024, 3:00 p.m. PST	
Interviews (tentative)	March 12, 2024	
Anticipated Contract Award Date	June 2024	

II. Scope of Work

Responses to this RFP should specify the way in which the following services will be provided:

A. Expansion of Online Permitting Capabilities

In collaboration with the County of San Mateo Planning and Building Department, the contractor will expand and perfect the Department's online permitting capabilities by enabling applicants to apply for all planning permits online¹ via the ACA portal, and by developing the back-end tools that enable staff to process online applications as efficiently as possible (e.g., status reports, due dates, processing timeframe reminders). To this end, the contractor must have the ability to identify and implement business workflows specified by staff with minimal technical assistance, integrate these workflows with other systems that are integral to the electronic permitting process (e.g., GIS, Bluebeam, Waste Management/Green Halo, IVR inspection scheduling, payment and accounting systems), create clear and logical interfaces for internal and external users, train staff on the use of new systems and procedures, and provide documentation regarding system design and use.

Using lessons learned from the building permit online permitting implementation (provided by County staff during the project initiation phase), the contractor should develop a planning permit system in Accela that mirrors aspects of the building permit system that work well and improves upon the existing system to provide a streamlined, intuitive, and user-friendly solution for both applicants and staff.

The high-level requirements for the expansion of online permitting capabilities are as follows:

- 1. Planning Permits ability to apply for and process the approximately 35 different planning permit cases/types that the Department issues.
- 2. Licensing/Renewals ability to apply for and process licenses and permits that are cyclical, have an expiration date and renewal process, and have the ability to be revoked.
- 3. Stormwater Case Types functionality for annual inspections and reporting for regional stormwater permit.
- 4. Automation of Fees ability to calculate, assess, invoice, and collect permit and license fees.
- 5. Querying of historical projects/databases.
- 6. Batch mailings generate notices to applicants and/or surrounding parcels.
- 7. Parcel tags ability to affix and search property-specific information and retain parcel genealogy.
- 8. Integration integration with Bluebeam, GIS, Waste Management/Green Halo, payment systems, and other review agencies.
- 9. Reporting functionality including executive dashboards, standard/crystal reports, State-required reporting, and letter generation.
- 10. Miscellaneous density and development footprint analyses, small research projects.

The project methodology shall include the following stages and services: project management and oversight, project initiation, requirements, analysis and design, build, quality assurance (QA), user acceptance training (UAT) and remediation, pre-deployment cutover planning and go-live

¹ There are approximately thirty-five different types of planning permits/cases.

support, go-live, post go-live support, and training and documentation for End User, Super User and IT.

B. Maintenance and General Support Services:

In addition to expanding online permitting capabilities, the Department is seeking a contractor to provide ongoing Accela database maintenance services including:

- 1. Configure the application to increase efficiencies
- 2. Review and document existing scripts
- 3. Update fee schedules and invoicing structure; redesign if necessary to eliminate fee miscalculation
- 4. Provide documentation on all vendor-made changes
- 5. Maintain and expand Electronic Document Review capabilities
- 6. Maintain and expand API integration with other systems
- 7. Redesign and create additional reports as needed (Dashboards, Crystal reports and AdHOC reports)
- 8. Phone support and issue resolution
- 9. Accela Citizen Access support and enhancements
- 10. End user training
- 11. Train the Trainer Training
- 12. Miscellaneous configuration as requested
- 13. GIS Solution analysis and implementation
- 14. User experience design and implementation
- 15. Business process review and optimization

The Scope of Work is to be used as a general guide and is not intended to be a complete list of all work necessary to complete the project.

The following performance measures will be used to evaluate the selected contractor's performance:

Measure	FY 2023-24 Actual	FY 2025-26 Projected
Percent of planning permits fully automated through Accela permitting system (from application through issuance)	0% of approximately 35 permit types	100% of approximately 35 permit types

One goal of this project is to minimize the number of separate workflows created for planning permits to limit unnecessary customization in an effort to streamline processes.

III. Submission Requirements

A. Submission Deadline

Proposals must be electronically received by 3:00 pm PST, on February 6, 2024, via Public Purchase (details below).

Allow sufficient time for the upload to complete by the Due Date and Time. Partial uploads will automatically terminate, and proposals will be rejected. The Public Purchase submission time will be the official submission time. The County will not be responsible for and may not accept proposals that are late due to slow internet connections or for any other failure of the Public Purchase system.

NOTE: The County does not maintain the Public Purchase system and is not liable for site failures or technical problems. To resolve technical issues, contact Public Purchase using the chat portal via link below or email Vendor Support at support@thepublicgroup.com:

http://www.publicpurchase.com/gems/help/mainhelp.html?frame1=public/info.html&frame2=public/info_register.html

B. Pre-submission Registration

Organizations or individuals interested in responding to this solicitation must register online with the County of San Mateo at:

https://www.publicpurchase.com/gems/register/vendor/register

It is recommended that organizations complete this registration as soon as possible to allow enough time for it to be processed. Each registration is manually reviewed and approved by Public Purchase, and this might take time. The County will not be responsible for and may not accept proposals that are late due to a failure to register in the Public Purchase system.

C. Submission via Public Purchase

1. Submission of Proposals:

1.1 Required Documents

Each of the following documents should be submitted as separate files following the instructions below:

- Technical proposal
- Fee proposal
- Minimum Qualifications Checklist

1.2 Electronic Submissions

Include the proposer name and the RFP title and number in each filename. Submit proposals via the Public Purchase website, allowing sufficient time for the upload to

complete by the Due Date and Time. As noted above, the Public Purchase submission time will be the official submission time, and partial uploads will automatically terminate, and proposals will be rejected. Contact Public Purchase with technical questions regarding the site.

1.3 Conflicts between Certain Requirements

Prior to the submission deadlines and solely relating to a determination of the timeliness of questions, comments, and proposal submissions, information displayed on the Public Purchase site will take precedence in the event of a discrepancy between that information and the information within the solicitation documents. For all other discrepancies, the information in the solicitation documents will take precedence.

1.4 Format

Documents should be created in the following format:

- Text should be Times New Roman (12-point minimum font size) and unjustified (i.e., with a ragged-right margin)
- Pages should have margins of at least one inch on all sides (excluding headers and footers)
- If the proposal is lengthy, a Table of Contents should be included.
- PDF format is preferred.

2. Errors in Proposals

The County will not be liable for any errors in proposals. Proposals may be rejected as unresponsive if they are late, incomplete, missing pages or information, or cannot be opened for any reason. The County may waive minor irregularities, but such waiver will not modify any remaining RFP requirements.

D. Technical Proposal (Maximum of 20 pages)

NOTE: Each one-sided letter-sized page is considered one page of content.

Pages that exceed the maximum page limit may not be reviewed or scored.

Proposers interested in responding to this RFP must submit the following information, in the order specified below:

1. Introduction and Executive Summary (up to 1 page)

Submit a letter of introduction and executive summary of the proposal. The letter must contain:

- Name, title and contact information (email, phone, and address) for representative of proposing firm who is responsible for communication related to this RFP
- Signature of person authorized to obligate firm to perform the commitment contained in the proposal

Submission of the letter will constitute a representation by firm that you are willing and able to perform the commitments contained in the proposal and have not violated the terms of this RFP.

2. Statement of Minimum Qualifications (up to 2 pages)

Describe how the firm meets the minimum qualifications as set forth in **Appendix A - Minimum Qualifications** of this RFP.

Submission of the MQ checklist does not negate the requirement to provide a detailed written response.

3. Project Approach (up to 8 pages)

Describe your proposed approach to performing the Scope of Work, including the following:

- 3.1 Scope of Work tasks/milestones.
- 3.2 Proposed schedule and ability to complete the project within the County's required time frame.
- 3.3 Any notable innovations or improvements that you expect to provide (with respect to, for example, efficiency, technology, sustainability, etc.).
- 3.4 Plan for achieving performance measures (if applicable).

4. Firm Qualifications (up to 3 pages)

Provide information regarding background and qualifications, including the following:

- 4.1 A brief description of the proposer.
- 4.2 A description of not more than three (3) projects similar in size and scope conducted by the proposer, including the client, reference and telephone numbers, primary staff members involved, budget, schedule, and project summary. Descriptions should be limited to one (1) page for each project.
- 4.3 If subcontractors are anticipated, identify them (if known) and provide information on how they will be used.

5. Team Qualifications (up to 4 pages)

- 5.1 Provide a chart identifying:
 - 5.1.1 Project team and reporting structure
 - 5.1.2 Lead project manager
 - 5.1.3 Role each person will play in the project
- 5.2 Provide a brief description of the experience and qualifications of the project team members, including short resumes if desired.

5.3 Provide written assurance that the key individuals listed and identified will be performing the work and will not be substituted or reassigned without the County's prior approval.

6. References (up to 2 pages)

Provide 3 references for the lead firm, lead project manager, and all subconsultants, including the name, address and telephone number of at least 3 but no more than 5 recent clients (preferably other public agencies).

7. **Fee Proposal** (not included in page count)

The Fee Proposal should be submitted as a separate PDF file from the Technical Proposals detailed in Section III.C.1.1.1 – Required Documents.

The County reserves the right to accept other than the lowest priced offer and to reject any proposals that are not responsive to this request.

Provide a Fee Proposal that specifies the costs for the project including the following, as applicable. Please be sure submit the completed Microsoft Excel sheet Fee Proposal template along with any additional explanation of fees for this service (please complete sheets 1 and 2 on the Excel document):

- Cost to conduct a business analysis of the Planning Division work process to identify business workflows and opportunities for automation.
- Approximate cost to implement a simple permit.
- Approximate cost to implement a moderate permit.
- Approximate cost to implement a complex permit.
- Hourly rates for each position title.
- All other costs associated with implementing the scope of work, such as other monthly costs for services (e.g., operations costs, equipment leases, etc.).
- Total annual cost of services, including a year-over-year summary.

The Year-over-year fee proposal (Years 1 through 3) will become the **Contract Total**.

IV. Evaluation and Selection Criteria

A. Minimum Qualifications (MQs)

Any proposal that does not demonstrate that the proposer meets these minimum requirements by the submission deadline may be determined to be non-responsive and not eligible for further consideration in the evaluation process.

Proposer is defined as the prime firm, organization, or joint venture that is submitting a proposal for this RFP.

Proposers must meet the following Minimum Qualifications:

- 1. Proposer shall have at least three (3) years of experience implementing and/or supporting Accela software upgrades.
- 2. Proposer shall currently maintain an Accela Partnership level of Bronze or higher.
- 3. Proposer is registered and in good standing with sam.gov/SAM/.

In order for a firm to pass the minimum qualifications and to be considered for contract award the firm shall be in good standing with federal government agencies and the State of California. Firms that have been debarred, suspended, proposed for debarment, declared ineligible by Federal or State agencies will not qualify for contract award.

B. Selection Criteria

The proposals will be evaluated by a selection committee with relevant expertise. The County intends to evaluate the proposals generally in accordance with the criteria itemized below. Proposers with the highest scoring proposals may be interviewed by the committee to make the final selection.

The selection committee will only review and score the Technical Proposals. The Fee Proposal score will be calculated and added to the Technical Proposal score. The sum of these two scores will equal the final score.

Technical Proposal (75%)

1. Project Approach

- 1.1 Demonstrates a clear understanding of the project/proposed services detailed in Section II SOW and the tasks to be performed.
- 1.2 Plan for achieving performance measures.
- 1.3 Reasonableness of proposed staffing level and allocation plan.
- 1.4 Strategy for successful engagement with the County.
- 1.5 Effective and cost saving innovations.

2. Firm Qualifications

2.1 Relevant expertise.

- 2.2 Quality of recently completed projects, including adherence to schedules and budgets.
- 2.3 Results of reference checks.

3. Team Qualifications

- 3.1 Expertise of the lead project manager.
- 3.2 Expertise of assigned staff in the subject area and description of the tasks to be performed by each staff person.
- 3.3 Workload, staff availability and accessibility.
- 3.4 Results of reference checks.

Fee Proposal (25%)

Interview

Following the evaluation of the written proposals, the top three to five highest ranking proposers will be invited to an interview. The interview will consist of standard questions asked of each of these proposers.

Interview evaluation criteria will include:

<u>Experience</u>: Relevance of the team experience as demonstrated by types and complexity of previous work presented. Evidence of the expertise that the team brings to the project.

<u>Approach to Implementation</u>: Understanding of the key long-range and short-range implementation issues that affect the project. Quality of the insight or conceptualization of the issues relevant to the project.

<u>Communication</u>: Quality of the verbal and graphic communication used to represent the skills of the team. Clarity of the organization and exposition of the presentation.

<u>Breadth</u>: Degree to which the technical expertise is complete for the anticipated scope of work. Evidence that the team is structured for a comprehensive approach.

<u>Management</u>: Evidence that previous work was well managed, within budget, and on-time. Explanation of relevant problems and how they were resolved.

V. Instructions to Proposers

A. Pre-Proposal Conference

Proposers are encouraged to attend a pre-proposal conference on **January 16, 2024,** at 1:00 pm PST, to be held virtually via Zoom:

 Register in advance for this webinar: https://smcgov.zoom.us/webinar/register/WN_FV_fqwkvTBiAW5Q1orYg7w).

All questions will be addressed at this conference and any available new information will be provided at that time. If you have further questions regarding the RFP, please post them on Public Purchase.

B. Communications

- 1.1 As of the issuance date of this RFP and continuing until it is canceled or an award is made, no proposer or person acting on behalf of a prospective proposer may discuss any matter relating to the RFP with any officer, agent, or employee of the County, other than through Public Purchase, to the Authorized Contact Person, or as outlined in the evaluation or protest procedures.
- 1.2 Proposers (including any agent, owner, employee, board members, or other such affiliates) shall not offer any gift, favor, or other personal benefit to any County officer or employee during the procurement process for this agreement, including during the solicitation period and contract negotiations.

Violation of the foregoing prohibitions may result in a proposer being found non-responsible and barred from participating in this or future procurements.

C. Contract Award

1.1 Award Procedure

Contract negotiations are neither an offer nor guarantee that a contract will be executed. A contract award, if any is made, will be to the responsive, responsible proposer offering the overall best value to the County for the services and goods described in this solicitation, or as applicable, for a specific portion of the services and goods described. Any agreement reached will be memorialized in a formal agreement using the attached template, executed by the appropriate authority.

1.2 Notice of Intent to Award

If a decision is made to take steps to enter into an agreement with one or more proposers, the County will post a Notice of Intent to Award or otherwise notify proposers the remaining proposers of their non-selection. Notice may instead be provided by including approval of the agreement as an item on an agenda for a meeting of the Board of Supervisors.

1.3 Commencement of Performance

After all parties have signed the agreement, the County will notify the contractor and performance may proceed. Prior to execution of the agreement by the County, no County employee may authorize work under the agreement. Any work performed prior to the full execution of the Agreement may not be compensated.

VI. Terms and Conditions for Receipt of Proposals

A. Errors, Omissions and Inquiries regarding the RFP

Proposers are responsible for reviewing all portions of this RFP. Proposers are to notify the Department, in Public Purchase, if the proposer discovers any ambiguity, discrepancy, omission, or apparent error in the RFP. Such notification should be made promptly after discovery, but in no event later than five business days prior to the deadline for receipt of proposals. Modifications and clarifications will be made by addenda as provided below.

Inquiries regarding the RFP should be lodged in Public Purchase.

B. Objections to RFP Terms

Should a proposer object on any ground to any provision or legal requirement set forth in this RFP, the proposer must, not more than ten calendar days after the RFP is issued, provide written notice to the Department, via Public Purchase, setting forth with specific grounds for the objection.

C. Addenda

The County may cancel, revise, or reissue this RFP, in whole or in part, for any reason. Revisions will be posted as Addenda on Public Purchase. No other revision of this RFP is valid. Proposers shall be responsible for ensuring that their proposals reflect any and all Addenda issued by the County prior to the proposal due date regardless of when a proposal is submitted. Therefore, the County recommends that proposers consult Public Purchase frequently, including shortly before the proposal due date, to confirm that all Addenda have been downloaded.

D. Term of Proposal

Submission of a proposal signifies that the proposed services and prices are valid for the duration of the proposed agreement term and that the quoted prices are genuine and not the result of collusion or any other anti-competitive activity.

E. Revision or Withdrawal of Proposal

A proposer may revise a proposal on the proposer's own initiative at any time before the deadline for submission of proposals. The proposer must submit the revised proposal in the same manner as the original on or before the proposal due date.

A proposer may withdraw a proposal at any time before the deadline for submission of proposals. After that time, whether or not a new RFP is issued for the same subject matter, withdrawal of a proposal may preclude the proposer from participating in the procurement as a proposer or subcontractor, except that an original equipment manufacturer may participate indirectly through a reseller.

F. Errors and Omissions in Proposal

The County will not be liable for any errors in proposals. Proposals may be rejected as unresponsive if they are incomplete, are missing pages or information, or cannot be opened for any reason. The County may waive minor irregularities, but such waiver will not modify any of the remaining RFP requirements.

G. No Commitment

Neither submission of a proposal nor the County's receipt of proposal materials confers any right to the proposer nor any obligation on the County. This RFP does not commit the County to award a contract.

H. Financial Responsibility

The County shall have no financial responsibility for any costs incurred by a firm in responding to this RFP or participating in any presentations or negotiations.

I. Estimated Quantity

If the RFP results in an indefinite quantity or a requirements agreement, the goods and services actually requested by the County may be less than the maximum value of the agreement and there is no guarantee, either expressed or implied, as to the actual quantity of goods and services that will be authorized under the agreement.

J. Public Record

1. General

- 1.1 All proposals, protests, and information submitted in response to this solicitation will become the property of the County and will be considered public records. As such, they may be subject to public review.
- 1.2 Any contract arising from this RFP will be a public record.
- 1.3 The County is not seeking proprietary information and will not assert any privileges that may exist on behalf of the proposer.
- 1.4 Submission of any materials in response to this RFP constitutes:
 - Consent to the County's release of such materials under the Public Records Act without notice to the person or entity submitting the materials; and
 - Waiver of all claims against the County and/or its officers, agents, or employees that the County has violated a proposer's right to privacy, disclosed trade secrets, or caused any damage by allowing the proposal or materials to be inspected; and
 - Agreement to indemnify and hold harmless the County for release of such information under the Public Records Act; and
 - Acknowledgement that the County will not assert any privileges that may exist on behalf of the person or entity submitting the materials.

K. Reservations of Rights by the County

The issuance of this RFP does not constitute an agreement by the County that any contract will actually be entered into by the County. The County expressly reserves the right at any time to:

- Waive or correct any defect or informality in any response, proposal, or proposal procedure;
- Reject any or all proposals;
- Reissue an RFP:

- Prior to submission deadline for proposals, modify all or any portion of the selection procedures, including deadlines for accepting responses, the specifications or requirements for any materials, equipment or services to be provided under this RFP, or the requirements for contents or format of the proposals;
- Procure any materials, equipment or services specified in this RFP by any other means; or
- Determine that no project will be pursued.

L. No Waiver

No waiver by the County of any provision of this RFP shall be implied from any failure by the County to recognize or take action on account of any failure by a proposer to observe any provision of this RFP.

M. Cooperative Agreement (Piggyback)

This competitive solicitation is being conducted as a Cooperative Procurement. The services, terms and conditions of any agreement resulting from this solicitation may be used by other organizations as a Cooperative Agreement.

This provision in no way commits any affiliate to procure services from any awarded contractor, nor does it guarantee that any additional orders will result. At their discretion, and subject to their own procurement policies, interested organizations may make use of this competitive procurement and contract directly with the awarded contractor.

VIII. Protest Procedures

A. Protest of Non-Responsiveness Determination

Within five (5) working days of the County's issuance of a notice of non-responsiveness, any firm that has submitted a proposal and believes that the County has incorrectly determined that its proposal is non-responsive may submit a written notice of protest. Such notice of protest must be received by the County on or before the fifth working day following the County's issuance of the notice of non-responsiveness. The notice of protest must include a written statement specifying in detail each and every one of the grounds asserted for the protest. The protest must be signed by an individual authorized to represent the proposer, and must cite the law, rule, local ordinance, procedure, or RFP provision on which the protest is based. In addition, the protestor must specify facts and evidence sufficient for the County to determine the validity of the protest.

B. Protest of Contract Award

Within five (5) working days of the County's issuance of a notice of intent to award a contract, any firm that has submitted a responsive proposal and believes that the County has incorrectly selected another proposer for award may submit a written notice of protest. Such notice of protest must be received by the County on or before the fifth working day after the County's issuance of the notice of intent to award.

The notice of protest must include a written statement specifying in detail each and every one of the grounds asserted for the protest. The protest must be signed by an individual authorized to represent the proposer, and must cite the law, rule, local ordinance, procedure or RFP provision on which the protest is based. In addition, the protestor must specify facts and evidence sufficient for the County to determine the validity of the protest.

C. Delivery of Protests

All protests must be received by the due date. If a protest is mailed, the protestor bears the risk of non-delivery within the deadlines specified herein. Protests should be transmitted by a means that will objectively establish the date the County received the protest. Protests or notice of protests made orally (e.g., by telephone) will not be considered. Protests must be delivered to:

Protest@smcgov.org Subject: RFP Name and Number