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TO: Steve Pedretti

FROM: Tiffany Schmid, Principal Planner

DATE: November 12, 2014

RE: Electronic Project Documents Review System and Implementation Services -
Request for Proposal

Project Overview:

The Community Development Agency (CDA) would like to advise the Board of Supervisors that, in accordance with CDA's 2014-2015 Business Plan, CDA is in the process of releasing a Request for Proposal (RFP) to contract with a vendor specializing in electronic plan submission and document review software that will replace current manual processes.

The overall goal is to increase efficiencies and reduce time and cost for the County and its customers to process plans. The specific goal of the software acquisition project is to implement technology that allows for the electronic submission of improvement and building plans and supporting documents, online review, approval, storage, and collaboration with other County departments, agencies and customers such as Transportation Division, Environmental Management Division, Long Range Planning Division, Surveyor's Office, Assessor's Office, Air Quality Management District, Fire Prevention Districts, Community Services Districts, South Lake Tahoe Public Utilities District, and El Dorado Irrigation District. The public and other outside agencies will have limited and/or secured access to the system.

The software acquisition will provide a system that allows customers to electronically submit plans in various formats to CDA, which can be shared electronically with other reviewers. This will eliminate travel time for the customer, speed receipt of plans, allow for online searching and status checks, ensure the plans are legible when stored electronically, facilitate concurrent reviews, and ultimately reduce the length of time from plan submittal to plan approval and permit issuance. The Electronic Plan Review system will also allow for comparison of changes throughout the process, tracking of notes/comments, version control, and remote accessibility from the job site, while minimizing re-checking of plans, and staff time used to scan and store plans.

The purpose of this RFP is to solicit proposals for the most appropriate electronic plan and document review system from a qualified vendor, including implementation services. CDA prefers to obtain an existing system that is commercially available without major customizations, that is in use by other similar agencies in other jurisdictions of a similar size and complexity, and proven to operate effectively over time. It is also preferred to partner with a vendor that has demonstrated long-term viability as a company and a long-term commitment to customers through regular product enhancements and on-going support.

The current budget for the software acquisition and implementation is \$50,000; however the actual cost of the project will not be known until the proposals are returned and a vendor is selected. There are many license and cost options, for example; purchased, hosted, lease-to-own, and Software as a Service (SaaS). If the cost of the project exceeds the budgeted amount, CDA will work within its budget to the extent practicable, or seek other internal sources of funding (e.g. permit fees). These optional funding sources would be pursued and the Board informed, or approval requested, as appropriate, prior to any decision-making.

The new software is expected to be purchased at the beginning of 2015 with pilot implementation completed by the summer of 2015. Following a successful pilot phase, subsequent phases involving organizations outside of CDA would then be implemented.

Initial roll-out is expected to achieve a 20% reduction in hard copy submissions with savings recognized in fiscal year 2015-2016. In the following 12 months it is anticipated that customer acceptance and use will increase to 40%. Subsequent years should see a continued increase in customer use; however, at no point do we expect that 100% of all plans will be submitted electronically, due to the number of small businesses and private citizens who apply for permits through the County.

The Electronic Plan Review system is a stand-alone program that will not interfere with the implementation of FENIX; however, it is anticipated that it will integrate with the FENIX system for fee payments, and at a future date, will integrate with a new Land Management Information System.

Project Objectives:

The following key objectives have been identified:

- Improve efficiency, effectiveness, and productivity of systems and services
- Provide value to stakeholders through increased automation, improved business processes, and productivity
- Enhance customer service through real-time web services
- Provide operational transparency to County residents
- Emphasize use of commercial software and reduce reliance on supplemental systems
- Utilize integrated technology solutions, including, but not limited to, mobile office, and web services
- Emphasize technology that is versatile to meet the changing federal, state, and local regulations

- Potentially incorporate other departmental services and functions, including, but not limited to permitting, licensing, and code enforcement

Project Benefits:

The following key benefits have been identified:

- Using electronic files will drastically reduce paper consumption, printing costs, and the cost to deliver, manage, and store paper documents
- Centralizing plans and documents will give complete visibility to all departments and stakeholders, while managing what changes have been made, by whom and when
- The public will have access to a secure, fast, and convenient system to submit/resubmit plans, and check plan review status
- Less staff time will be needed to reply to status updates, which will free up staff to work on other important CDA improvements
- Customers will no longer need to drive to CDA, thus, reducing traffic on the highways, and saving time and money
- Correction letters will be able to be sent with email communication if the customer so chooses
- Parallel reviews will facilitate increased communications, accuracy, and shorten or reduce resubmission cycle(s)
- Streamlined workflow processes means construction projects will be under construction and completed sooner, which in turn will create jobs and increase tax roll at a faster rate

Cc:

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