LAKE TAHOE BASIN INFORMATION EXCHANGE (LT INFO) AND ENVIRONMENTAL IMPROVEMENT PROGRAM (EIP) REPORTING TOOL (RT) DEVELOPMENT

SECTION I: GENERAL INFORMATION

I.1) INTRODUCTION

The purpose of this Request for Proposal (RFP) is to select a consultant to assist the Tahoe Regional Planning Agency (TRPA), who is the fiscal agency acting on behalf of the Tahoe Interagency Executive Steering Committee (TIE-SC), in developing a Lake Tahoe Basin Information Exchange (LT INFO) and further development of the Environmental Improvement Program (EIP) Reporting Tool (RT).

TRPA is seeking a consultant or team of consultants with (1) recent experience developing data management solutions for multi-agency partnerships, (2) experience developing reports and/or reporting tools for multi-agency partnerships, and (3) experience working with or knowledge of large-scale monitoring and evaluation programs and/or capital improvement programs and management systems used to maintain and improve them.

The objective of this project is to develop an internet-based Lake Tahoe Basin Information Exchange (LT INFO) system and associated high priority applications. The deployment of LT INFO and associated applications seeks to improve and streamline environmental and community decision-making in the Lake Tahoe Basin and build general public awareness of environmental and socio-economic conditions in the Lake Tahoe Basin. This contract is for completion of the first phase of the development of the system: (1) LT INFO, which includes the underlying framework technology and governance system, and (2) a Lake Tahoe EIP Reporting Tool.

I.2) BACKGROUND TO LT INFO AND EIP RT

Over 50 entities – federal, state, and local agencies, the private sector, non-governmental organizations, and science and research groups – are involved in restoration and planning efforts in the Lake Tahoe Basin. These agencies and organizations collect, analyze, and publish data and reports concerning the environmental health of the Basin. Each year, these entities receive numerous requests from other agencies, elected officials, research scientists, and the public for their data and information. Individually, they also expend an enormous amount of effort conducting public outreach activities to inform stakeholders about their work and enlist participation and interest in their organization’s efforts. Organizations need a mechanism to efficiently exchange data and information with each other and the public. The original Tahoe Integrated Information Management System (TIIMS) was developed in attempt to meet this need.

In 2012, TRPA hired a consultant to develop an assessment, strategic plan, and financial strategy for TIIMS and the EIP Reporting Tool. The objective of the contract was to develop a strategic plan and long-term financial strategy that ensured a financially viable, user-friendly, dynamic, efficient TIIMS and EIP RT “2.0”. The strategic plan and financial strategy were developed to help guide the TIE-SC’s
investment in the development and long-term management of TIIMS and the EIP RT. The recommendation of the Strategic Plan and Financial Strategy was to develop LT INFO, which included an underlying technology and governance system, and further develop the highest priority application (identified through the strategic planning process), the EIP Reporting Tool.

The Strategic Plan outlined the following goals for LT INFO and the EIP RT:

1) Improve and streamline decision-making in the Lake Tahoe Basin
2) Build general public awareness of environmental and socio-economic conditions in the Lake Tahoe Basin
3) Sustain the system

The Strategic Plan also identified strategies to meet these 3 goals:

1) Select software that minimizes development, maintenance and administrative costs
2) Employ user interface design and application development best practices to guide system development
3) Document and use decision-making processes, roles, and reporting to develop and administer the LT INFO
4) Secure sustained funding for the LT INFO and do not commence development of an application without long-term funding secured
5) Use a marketing plan and educational materials, and offer training to build support and increase users of LT INFO
6) Maintain a ‘User Guide’ for each application to ensure published content is relevant and updated
7) Leverage appropriate partners in the development and long-term administration of each application, and avoid development of redundant systems


**I.3) PUBLIC RECORDS**

The documents submitted in response to this request for proposal become a public record upon submission to the Agency subject to mandatory disclosure upon request by any person unless the documents are exempted from public disclosure by a specific provision of the respective Nevada and California public information statutes. Restrictions on any information submitted will render a bid non-responsive. The Agency assumes no contractual obligation to enforce any exemption on behalf of a respondent to this RFP.

**I.4) RFP COORDINATOR**

Upon release of the RFP, all communications concerning this proposal request should be directed to the RFP Coordinator listed below. Unauthorized contact regarding this RFP may result in disqualification. Any oral communications will be considered unofficial and non-binding on the Agency. The respondent should rely only on written statements issued by the RFP Coordinator.
I.5) RFP SCHEDULE

The Agency anticipates the following schedule, which is subject to change:

<table>
<thead>
<tr>
<th>Date</th>
<th>Event</th>
</tr>
</thead>
<tbody>
<tr>
<td>Thursday, November 14th</td>
<td>Issuance of RFP/Date of Announcement</td>
</tr>
<tr>
<td>Thursday, November 21st</td>
<td>4pm, PST (postmarked) Deadline for submission of written questions to the Agency</td>
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<tr>
<td>Tuesday, November 26th</td>
<td>Agency releases responses to questions</td>
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<tr>
<td>Friday, December 13th</td>
<td>4pm, PST (postmarked) Proposal Submission due to Agency</td>
</tr>
<tr>
<td>Wednesday, December 18th – Friday, December 20th</td>
<td>Evaluation Complete/Finalists Selected and Finalist Interviews (as determined by the Agency)</td>
</tr>
<tr>
<td>Wednesday, January 8th</td>
<td>Contract Award</td>
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Late proposal submissions will not be considered and will be returned unopened to the sender.

I.6) QUESTIONS REGARDING THE RFP

Requests for clarification or additional information must be made in writing to the RFP Coordinator, Karin Edwards, prior to the date specified in the RFP Schedule. Written responses to all requests will:

- Be furnished to all potential bidders as determined by the Agency’s receipt of a completed RFP Acknowledgement Form (Attachment 1); and

Any verbal communication with the RFP Coordinator or a staff member of the Agency concerning this RFP shall not be considered binding on the Agency and shall in no way alter a specification, term, or condition of the RFP.

The RFP Coordinator will be unable to respond to requests for additional information or clarification received after 4:00 p.m. PST, November 21st, 2013.

1.7) AMENDMENTS

In the event of a material modification, all known and/or potential bidders will be notified of an amendment to the RFP as determined by the Agency’s receipt of a completed RFP Acknowledgment.
Form. If deemed necessary by the Agency, bidders will be given an opportunity to modify their proposal in the specific areas that are affected by the amendment.

1.8) PROPOSAL SUBMISSION

Each bidder must submit three (3) copies of their proposal. In addition, one electronic copy of the proposal and any supporting documentation (Microsoft Word or PDF) must be submitted on CD-ROM. The complete proposal package must be submitted in a sealed envelope, plainly marked “TIIMS STRATEGIC PLAN RFP” and “DO NOT OPEN – Sealed Bid Enclosed”, name and contact information of bidder, and addressed to the attention of Karin Edwards, EIP Coordinator as follows:

Tahoe Regional Planning Agency
Attention: Karin Edwards, Policy Analyst
Physical Address (FedEx/UPS Delivery):
128 Market Street
Stateline, NV 89449
Mailing Address (US Mail only):
P.O. Box 5310
Stateline, NV 89449-5310

Bidders accept all risk of late delivery of mailed proposals regardless of fault. Late proposal submissions will not be considered. Also, facsimile and other electronically transmitted proposals will not be considered.

All proposals and accompanying documentation become the property of the Agency and will not be returned.

1.9) TERMS AND CONDITIONS

- The Agency reserves the right to amend the RFP schedule or issue amendments to the RFP at any time. The Agency 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. The Agency 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. The Agency reserves the right to effect any agreement deemed by the Agency to be in its best interest. This RFP does not obligate the Agency 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 Agency approval, the Agency 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.

- The Agency 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 specifications. 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.

- Selected consultant(s) will be expected to sign the TRPA Consultant Services Agreement listed on http://www.trpa.org/default.aspx?tabindex=13&tabid=121.

- All subcontractors, if any, used by the selected consultant will require prior written consent of the Agency and will be subject to all provisions stipulated in the TRPA Consultant Services Agreement.

- This contract will be funded by federal grant awards and is subject to federal grant award requirements including, but not limited to, cost principles and administrative regulations.

- TRPA will make a ‘good faith’ effort to contract with small, minority, and women owned business enterprises. Accordingly, TRPA strongly encourages small, minority, and women owned businesses to reply either in part of whole for tasks listed within this RFP.

- The executed contract may be terminated by the Agency in the event the successful bidder:
  - Fails to meet delivery schedules;
  - Otherwise fails to perform in accordance with this contract;
  - Becomes insolvent and/or files for protection under the bankruptcy laws.

- The vendor shall be entitled to just and equitable compensation for any satisfactory work completed through the termination date. Under no circumstances will any damages be paid as a result of the termination of this contract. If the Agency exercises the right to terminate the contract early, the vendor may be prohibited from submitting future proposals to the Agency for a specified period.

**SECTION II: SCOPE OF SERVICES**

II.1) PROJECT DELIVERABLES

The objective of this project is to develop an internet-based Lake Tahoe Basin Information Exchange (LT INFO) system and associated high priority applications. The deployment of LT INFO and associated applications seeks to improve and streamline environmental and community decision-making in the Lake Tahoe Basin and build general public awareness of environmental and socio-economic conditions in the Lake Tahoe Basin. This contract is for completion of the first phase of the development of the system: (1) LT INFO, which includes an underlying framework technology and governance system, and (2) a Lake Tahoe EIP Reporting Tool.

For both LT INFO and the EIP Reporting Tool, all software platforms selected by the consultant shall be publicly available (i.e., no custom software). The EIP Reporting Tool shall utilize a relational database management system to be provided with LT INFO and used for storage of LT INFO data. In addition, the
Interface between the EIP RT application and the LT INFO database must be compliant with Microsoft SQL Server standards. All web applications must be compliant with Microsoft ASP.NET. All GIS applications must be compliant with ESRI ArcGIS standards. Consultant will be required to provide all source code, with programmer’s comments and documentation, and all database diagrams before final acceptance. All project deliverables will become the property of TRPA.

(1) LT INFO

Applications running on LT INFO will be supported by an underlying technology and governance systems. The technology system will include hardware, operating systems, and software. The governance system will include technical support and administrative roles, decision-making processes, and end-user education. End users will not interact with the underlying system directly; however the applications will not exist, gain traction among users or effectively reach target audiences over time without the underlying technology and governance system. Lastly, a financial tracking and forecasting tool will be used to proactively manage revenue and expenses, and evaluate different funding and expense scenarios.

- Create a technology platform to support highly demanded applications.
- Ensure effective and cost-efficient development and maintenance of the system.
- Build support among partners and grow end users of the system.

LT INFO shall include:

a. Underlying Technology System (hardware, operating systems, software)

b. Governance System (The system governance process will guide the administration of the overall system to ensure funder and user needs are fulfilled and the system is financially sustainable over the lifetime of the system. The system governance structure will be used by the system administrator. User Guides will be developed during the development of each application to guide users in keeping content updated and using each application.)

c. User Interface Design and Application Development Best Practices Guidance

d. Financial Tracking & Forecasting Tool (and guidance memo)

(2) Lake Tahoe EIP Reporting Tool

The Lake Tahoe EIP Reporting Tool seeks to provide EIP management and funders the project and programmatic level data necessary to understand the environmental return on their investments and secure future funding for environmental improvement in the Tahoe Basin. The EIP RT will focus on tracking and reporting information needed for programmatic management. Agency management, funders, and the interested public are the target audiences for the EIP RT. The EIP Reporting Tool will replace current EIP reporting prepared for EIP management, funders and legislative staff, simplify existing data collection and report development, and generate reports in a more timely manner than existing processes.

Lake Tahoe EIP Reporting Tool shall include:
a. Database  
b. User Interface  
c. Governance Process and Agreements  
d. Easy to understand User Guide to ensure projects are updated timely and consistently

Desired features of the database and user interface include:

a. Publicly accessible search capability  
b. Publicly accessible mapping capability of specific projects by location and type  
c. Reporting of project profiles, and before and after site photos  
d. Generation of reports that meet legislative and other reporting requirements  
e. Dynamic management of the EIP 5-Year List

II.2) ANTICIPATED PROJECT SCHEDULE

The schedule to complete the development and deployment of LT INFO and EIP RT, and the associated program management aspects is expected to last six months from the date of the signed contract.

It is expected that the selected consultant will be able to initiate related project tasks as soon as the contract terms are agreed to. Should the consultant and TRPA be unable to agree to the terms of the contract, TRPA will reserve the right to disqualify the consultant and select another consultant. Should this process not result in the hiring of a consultant, the RFP may be reissued.

The development and deployment of LT INFO and the EIP RT and the associated program management aspects will be managed by TRPA.

II.3) SPECIFIC PROJECT TASKS

The consultant will be expected to coordinate closely with an Oversight Committee and the Tahoe Interagency Executive Steering Committee (TIE-SC).

- The Oversight Committee is comprised of senior managers and technical staff, from agencies and groups that will use LT INFO and the EIP RT.
- The TIE-SC is the executive level group that oversees the implementation of the Environmental Improvement Program (EIP).

The following tasks will be required of the consultant over the proposed 6 month period:

**TASK 1: DEVELOP LT INFO’S UNDERLYING TECHNOLOGY AND GOVERNANCE SYSTEM**

1) Review of TIIMS Redesign Strategic Plan & Financial Strategy  
2) Procure and deploy underlying technology infrastructure  
   a. Determine server requirements for web, database, and GIS components  
   b. Procure server(s)  
   c. Determine software requirements (database, content management system, GIS)  
   d. Procure software
Identify and procure hosting solution for bandwidth requirements (web server, database server, underlying hardware, bandwidth requirements)

3) Develop system governance process and agreements
   a. Develop understandable and implementable system governing process manual based on input provided by partners
   b. Establish business agreements and memorandums of understanding (MOU) with partners
      i. Identify agencies that will be engaged with the systems implementation
      ii. Conduct interviews/meetings
      iii. Layout terms of agreements

4) Develop user interface design and application development and maintenance best practices guidance
   a. Draft user interface design and application development process manual
   b. Collect program management feedback on user interface design and application development process manual
   c. Develop final user interface design application development process manual

**TASK 2: DEVELOP THE LAKE TAHOE EIP REPORTING TOOL**

1) Review of TIIMS Redesign Strategic Plan & Finance Strategy
2) Conduct a review of the existing EIP Reporting Tool
3) Using the existing EIP Reporting Tool, obtain additional program management input on EIP reporting needs from...
4) Develop System Architecture Requirements and Design Report
   a. Develop draft systems architecture document for review with program stakeholders. This will include a definition of key systems components and architecture diagrams. Document shall be concise and understandable.
   b. Review of systems architecture with project staff.
   c. Revisions to draft architecture based on staff feedback.
   d. Delivery of final systems architecture document, including the database design.
5) Develop Application Requirements and Design Report
   a. Security Requirements
   b. Customized Interfaces
   c. GIS Interfaces
   d. Workflow for EIP project reviews and commentary
   e. Report Generation (Published Reports)
   f. Predefined Report Display (PDF)
   g. Data Import
   h. Data Extraction, Export and Download
      i. Documentation
6) Data Creation and Compilation
a. Gather all relevant current data, documents, and website content for the underlying EIP Reporting Tool.
b. Provide data and documentation for preliminary loading to the application.
c. Review and test all datasets to ensure they are acceptable in the EIP Reporting Tool.
d. EIP Reporting Tool Database and Associated Website Content.

7) Software Application Development and Testing
   a. Test database and reporting tool to ensure that it follows identified best practices.
   b. Alpha and Beta testing
   c. Software design, development, and implementation

8) Application Deployment

9) Acceptance and Approval of Final Release

10) Production of EIP Annual Report Prototype

SECTION III: RFP RESPONSE INSTRUCTIONS

III.1) PROPOSAL FORMAT

Proposals should be prepared simply and economically, providing a straight-forward, concise description of bidder capabilities to satisfy the requirements of this request. Special bindings, colored displays, promotional materials, etc., are not desired. Emphasis should be placed on completeness and clarity of content. All proposal responses must be in the following format:

1. **Cover Letter/Executive Summary**
   The cover letter should contain the name of the bidding Company, the address of the proposing officer(s), and the contact individual(s) authorized to answer technical, price, and contract questions. Contact information should include telephone number, fax number, mailing address, and email address. The cover letter must be signed by a person or persons authorized to bind the bidder. The Bidder shall include a brief summary that includes the actual scope of basic services offered, experience and qualifications of the Bidder, staff, consultant, sub-consultants and/or suppliers, a list of relevant projects in the last five (5) years and the timeliness in which they were completed and any other relevant information. The cover letter should not exceed two (2) pages, as written in Calibri size 12 font, and page margins not to be lesser than 1” on all sides.

2. **Table of Contents**
   The contents of the proposal shall be included in an index at the beginning of the proposal and should include all contents and attachments. The table of contents should not exceed two (2) pages, as written in Calibri size 12 font, and page margins not to be less than 1” on all sides.

3. **Company Background/Qualifications**
   This section should include the full name and principal address of the company, as well as the distance of your nearest office to the Tahoe Regional Planning Agency. Include the state in which the Company is incorporated to operate and the date of incorporation. Provide a brief overview of the general background and services provided by your firm, including size of organization, description of organization structure, and number of years in business, and experience in serving governmental entities. Identify key staff in your company and affiliates including subcontractors or sub-consultants to fulfill the contract requirements. Provide their
resumes with job descriptions and other detailed qualification information. Include the proposed role and estimated amount of time to be spent on this project for each person. Identify key measures of the company’s financial strength. Respondents should be prepared to submit a copy of financial statements for the past two years, upon the Agency’s request. The company background should not exceed three (3) pages, as written in Calibri size 12 font, and page margins not to be less than 1” on all sides. Resumes provided should not exceed two (2) pages, as written in Calibri size 12 font, and page margins not to be less than 1” on all sides.

4. **Scope and Methodology**

Provide in detail how your firm would add value to this process. Set forth a work plan, including the methodology and processes to be followed to perform the services as identified in Section II. Also outline a project timeline from award of contract to final report, allowing for sufficient time for presentations to the Agency. The scope and methodology should not exceed five (5) pages, as written in Calibri size 12 font, and page margins not to be less than 1” on all sides.

5. **References**

Provide a minimum of three (3) client references of similar sized regional and/or municipal accounts which the bidder has served in a similar capacity over the past two years and/or is currently serving. Provide a contact person, telephone number, and email address for each reference customer. The References section should not exceed one (1) page, as written in Calibri size 12 font, and page margins not to be less than 1” on all sides. Client recommendation submissions in response to this section are welcomed and should be included in the Attachments section. Client recommendation submissions should not exceed one (1) page in length, as written in Calibri size 12 font, and page margins not to be less than 1” on all sides.

6. **Cost Proposal**

Provide an all-inclusive cost estimate, not to exceed $215,000.

7. **Attachments**

Additional information that the bidder believes is critical to the Agency’s assessment of the proposal should be included in this section. As noted previously, marketing promotional materials are not desired for review of the response to the RFP. Bidders are strongly encouraged to include a sample plan from a similar project in this section.

**SECTION IV: PROPOSAL EVALUATION**

Proposals will be evaluated by a committee of Agency and non-agency Environmental Improvement Program individuals. Evaluations will be based upon the criteria outlined herein which may be weighted by the Agency in a manner it deems appropriate. All proposals will be evaluated using the same criteria and weighting. The criteria used will be:

**IV.1) RESPONSIVENESS TO RFP**

The Agency will consider all the material submitted to determine whether the bidders’ offering is in compliance with the RFP. It is important that the responses be clear and complete so that the evaluation committee can adequately understand all aspects of the proposal.
IV.2) ABILITY TO PERFORM REQUIRED SERVICES

The Agency will consider all the material submitted by each bidder, and other relevant material it may otherwise obtain, to determine whether the bidder is capable of and has a history of successfully completing contracts of this type. The bidder shall furnish acceptable evidence of their ability to perform, regarding such categories as expertise and experience.

1. In general, proposals will be evaluated based on content, project approach, qualifications, quality, cost, timing, and references, if applicable.
2. Initial screening of applicant proposals will be to determine level of knowledge, experience, and qualifications.
3. Evaluation of those applicants determined to have the desired qualifications and experience will be based on the following criteria:
   a. Recent experience developing data management solutions for multi-agency partnerships;
   b. Experience developing reports and/or reporting tools for multi-agency partnerships
   c. Experience working with or knowledge of large-scale monitoring and evaluation programs and/or capital improvement programs and management systems used to maintain and improve them;
   d. Basic understanding the issues and concerns related to the Lake Tahoe Basin and the Environmental Improvement Program (EIP);
   e. Available and appropriate human and office resources to successfully complete project objectives at a fair and reasonable price. An estimated budget (and a not to exceed cap statement) and schedule should be included in each proposal as well as characterization of the consultant’s team’s organization and member’s skills, abilities, and experience.
   f. Strong group facilitation skills;
   g. Strong technical background in data management systems;
   h. Demonstrated ability to complete work tasks within time and budget limitations;
   i. Clarity of understanding of the project objectives, task completion approach, and final products.

IV.3) REFERENCES

The Agency may contact references directly to inquire about the quality and type of services that have been or are currently being provided to other customers.

IV.4) FEES

The contract is being funded through the US Environmental Protection Agency (EPA) and US Bureau of Land Management, utilizing funding authorized by the Southern Nevada Public Land Management Act (SNPLMA) and therefore is limited to an amount not to exceed $215,000. The Agency’s evaluation process is intended to help the Agency select the vendor with the best attributes for accomplishing the scope of work.

IV.5) OPTIONAL INTERVIEWS
At the discretion of the Agency, second interviews may be arranged with the top finalists to assist in making a final selection. Selection shall be based upon evaluation criteria, committee’s recommendations and subject to Agency approval.