



Request for Information (RFI) for Automated Plan Review Services

Planning & Building Department

RFI PLN23-0301

Date issued:

March 1, 2023

Submittals due:

March 24, 2023 – 3 P.M. PST

RFI Contact:

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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 448 square miles of land and is home to nearly 755,000 residents. The County provides for the health and welfare of all people within its borders and serves as the local land use authority in 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 Planning and Building Department (Department) of the County of San Mateo is undertaking research to determine the types of automated solutions that could be developed or that are available to review electronic blueprints for compliance with Zoning Regulations and the California Building Code. This system will be used by professional plan reviewers to facilitate and expedite what is now a manual, time-intensive process.

In recognition of the challenges associated with the development of such a system, the Department encourages proposals that take a phased approach to determine the feasibility of this type of automation. This may involve selecting a specific provision of the Building Code (e.g., plumbing, electrical, structural, or mechanical) to test proof of concept.

Proposers are also encouraged to identify how much of the system can be integrated with other technologies. The Department is currently using Accela to manage the permitting process, and Bluebeam to facilitate electronic plan review, as well as other systems to complete development reviews and property improvement assessments.

Firms that meet the Minimum Qualifications in **Appendix A – Minimum Qualifications Checklists**, are encouraged to submit a response to this RFI. The goal of this RFI is to understand the options that are available in the marketplace. Up to 4 firms may be invited to provide a demonstration of the automated plan checking software to County staff, and/or to explain the way in which it will be developed.

B. Schedule

RFI Released	March 1, 2023 PST
Submittal Due Date and Time	March 24, 2023 - 3:00 P.M. - PST
Presentation (tentative)	Week of April 10, 2023

II. Scope of Work

A. Introduction

The Planning and Building Department of the County of San Mateo is seeking an automated solution that can interpret building and site plans, check the plans for Zoning Regulations, and Building Code compliance, and provide a recommendation for approval or denial of the submitted plans.

B. Plan Check Solution Details

The plan check solution should have the following components. Responses to this RFI should highlight how the solution stands out in the marketplace and/or what process and timeline would be used to develop this solution. The goal of the solution is to streamline the plan check process to make it easier for staff involved.

Responses to this RFI should address how the solution will be developed, and the features that will be components of the solution including:

System Components:

1. User Interface

Identify how the users' needs will be addressed by the solution.

2. Ability to Interpret Plans

Describe how the solution would distinguish and interpret different types of plans and what limitations apply (if any).

3. Ability to Evaluate Plans

Describe the process that the solution will use to evaluate plans against [Zoning Regulations](#) and [Building Code requirements](#), and how proof of concept will be provided.

4. Recommend Approval or Denial

Describe the process that the solution will use to make a recommendation for approving or denying plans.

5. Provide Reasons for Recommendation of Approval or Denial

If possible, provide a sample review output that includes justifications for the recommendation (approval/denial) and identifies the changes that need to be made to achieve an approval recommendation. If a sample output is not available, describe the way in which the rationale for the automated recommendation will be designed and provided.

6. Integration with other systems (optional)

Identify the way in which the solution will be integrated with the other systems being used as part of the permitting process (e.g., Accela, Bluebeam, GIS).

User Components:

7. Implementation

Discuss the implementation process and timeline for incorporating different types of decision criteria to evaluate plans against other regulations and/or ordinances and describe how and when the proof of concept will be established.

8. Training and Helpdesk

Explain the transition and education of staff on the use of the solution. State the number of hours it takes for staff to be comfortable using the solution. Discuss the ongoing training and assistance available.

C. Presentation

The County will invite up to four firms to present; invited firms will have **90 minutes** in total for the presentation and questions and answers. Time keeping will be strictly monitored.

All presentations will be conducted online.

The presentation should be a high-level overview of the proposed solution, walking through the process that would be taken to develop and perfect the solution, including a timeline. The presentation should also highlight the qualities and experience of the solutions developers that will result in a product that is superior to the solutions that may be proposed by others.

III. Submission Requirements

A. Submission Deadline

Proposals must be electronically received by **3:00 P.M. PST on March 24, 2023**, via Public Purchase (details below).

Allow sufficient time for the upload into Public Purchase to complete by the Due Date and Time. Partial uploads will automatically terminate and those firms will not be considered for a presentation. The Public Purchase submission time will be the official submission time. The County will not be responsible for and may not consider responses 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

Late submissions will not be considered for participation in the presentation stage.

B. Submission via Public Purchase

1. Submittal should consist of:

- Appendix A – Minimum Qualifications Checklist
- Appendix B – Solution Summary
- Appendix C – Estimated Cost and Timeframe

2. Errors in Submissions

The County will not be liable for any errors in submissions. Submissions 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 RFI requirements.

3. Estimated Cost and Timeframe

This section should outline the estimated cost for this solution as well as a timeline demonstrating the timeframe for development of this solution and/or the timeframe to roll out this solution with staff.

C. Public Records

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.

Submission of any materials in response to this RFI constitutes:

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(a) 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

(b) 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

(c) Agreement to indemnify and hold harmless the County for release of such information under the Public Records Act; and

(d) Acknowledgement that the County will not assert any privileges that may exist on behalf of the person or entity submitting the materials.

IV. Minimum Qualifications and Review Process

A. Minimum Qualifications (MQs)

Any proposal that does not demonstrate that the submittal meets these minimum requirements by the deadline for submission will be considered non-responsive and will not be eligible for review.

Firm is defined as the prime firm or joint venture that is responding to this RFI.

A completed Appendix A – Minimum Qualifications Checklist, must be included in the response to this RFI. The information in the Minimum Qualifications Checklist will be used by the reviewing parties as a summary sheet for the solution.

The proposed solution must meet ALL of the following Minimum Qualifications:

1. Provides user interface.
2. Ability to interpret plans.
3. Ability to evaluate plans.
4. Ability to recommend approval or denial of plans.
5. Ability to provide reasons for recommendation of approval or denial.

B. Review Process

County subject matter experts will review the submittals and up to four (4) firms may be invited to present a proposal.

Appendix A – Minimum Qualifications Checklist

I, **Insert Name**, am a **Insert Title** at **Insert Firm** and am authorized to execute this Certification on its behalf.

Minimum Qualifications for the Solution

	Requirement – the solution to be developed must have ALL of the following components within the system:	Response
1.	Provides User Interface	<input type="checkbox"/> Yes <input type="checkbox"/> No
2.	Ability to Interpret Plans	<input type="checkbox"/> Yes <input type="checkbox"/> No
3.	Ability to Evaluate Plans	<input type="checkbox"/> Yes <input type="checkbox"/> No
4.	Ability to Recommend Approval or Denial of Plans	<input type="checkbox"/> Yes <input type="checkbox"/> No
5.	Ability to Provide Reasons for Recommendation of Approval or Denial	<input type="checkbox"/> Yes <input type="checkbox"/> No

I certify that the foregoing information is true and correct as of the date of this Certificate.

Signature: _____ Title: Click or tap here to enter text.

Date: Click or tap to enter a date.

Appendix B – Solution Summary

In a concise manner, share the following information.

Solution Summary

1.	Name of the Organization:
2.	Name of the Solution:
3.	Name of Contact Person: Title: Contact email: Contact phone number:
4.	Is the solution single tenant or multi tenant solution? <input type="checkbox"/> Single <input type="checkbox"/> Multi
5.	A brief instruction of the firm and the solution. Click or tap here to enter text.
6.	Where did this solution originate from (in relation to the procurement lifecycle)? Click or tap here to enter text.
7.	What is most innovative about this solution? Click or tap here to enter text.
8.	Is implementation handled internally (within your organization), or with 3 rd party organization? <input type="checkbox"/> Internal <input type="checkbox"/> 3 rd Party <input type="checkbox"/> Both