Request for Proposals

The Tulsa Planning Office is seeking proposals for the establishment of a new customer service and case management software solution that will provide a high level of functionality and ease of use.

RFP Issue Date:	12/17/2021
Proposal Due Date:	02/11/2022 5:00 p.m. CST

All proposals must be submitted to nfoster@incog.org.

Contact Nathan Foster, Senior Planner, with any questions or requests for additional information:

Nathan Foster
nfoster@incog.org
918-579-9481

Project Scope:

The Tulsa Planning Office is seeking proposals for the establishment of a new customer service and case management software solution that will provide a high level of functionality and ease of use. The new software is required to create and track applications and cases, calculate appropriate fees, populate necessary documents with case information such as notices and file templates, and provide a public facing interface that allows the public to view and research case information or submit applications digitally. Additionally, the proposed software must create agendas for selected hearing dates and provide staff with the ability to upload meeting minutes with results. Cases must be georeferenced and tracked so that historic information can be queried, viewed, and mapped. Staff must have the ability to update application or case status at any time to track progress and update the public-facing component. The system must utilize GIS data provided by the Tulsa Planning Office and historic case information must be integrated into the new system to ensure future queries reflect all relevant case information.

Application Intake & Tracking:

The Tulsa Planning Office provides staffing to the City of Tulsa and Tulsa County Boards of Adjustment (BOA/CBOA), the Tulsa Metropolitan Area Planning Commission (TMAPC), the Tulsa Arts Commission, and the Tulsa Preservation Commission, and administers other permitting programs for the City of Tulsa. Applications processed by the Tulsa Planning Office include, but are not limited to:

1. City and County Rezonings (TMAPC)
2. Development Plans (TMAPC)
3. Special Exceptions & Variances (BOA/CBOA)
4. Appeal of Administrative Official (BOA/CBOA)
5. Administrative Adjustments (BOA)
6. Subdivisions (TMAPC)
   a. Sketch Plats
   b. Preliminary Plats
   c. Final Plats
   d. Subdivision & Development Regulations Compliance
   e. Change of Access
7. Lot Splits, Lot Line Adjustments, Exempt Land Divisions (TMAPC)
8. Amendments to Development Plans (TMAPC)
   a. Major Amendments
   b. Minor Amendments
9. Development Plan Conformance (TMAPC)
   a. Site Plans
   b. Landscape Plans
   c. Sign Plans
   d. Site and Landscape Plan Revisions
10. Comprehensive Plan Amendments (TMAPC)
11. Alternative Compliance Landscape Plans
12. Sidewalk Café and Parklet Permits
13. Tables and Chairs Permits
14. Property Record Searches
15. Zoning Letters

The proposed solution must provide the ability to create new cases based on property location and collect or generate case information including:

- Case Number (Based on case type)
- Date Filed
- Applicant Information
- Property Owner Information
- City Council District
- County Commission District
- City and County Land Use Designation
- Corporate Limits for Tulsa Metropolitan Area

- Property Information
  - Address, Legal Description
- Existing Zoning
- Applicant Request (Varies by application)
- Hearing Date if applicable
- Application Fees
- Case Status
- Special Project Categorization

Document Creation:

A template will be provided for the standard application that will need to be generated for all case types and auto populated with data from the application. The application will include the case information and a signature line for authorization by the applicant and to verify all information has been entered correctly. The application must include a digital form that includes an option for digital authorization by the applicant so that online submittals can be possible. The application will also outline fees calculated for the application so that the applicant can submit it to the cashier when making final payment.

The application must create a staff report template that is auto populated with relevant information from the application and provides staff with the ability to input or edit detailed staff recommendations for appropriate decision-making bodies.

Certain case types require public notices to be sent prior to the assigned hearing date. The proposed software solution must be able to generate notice information based on templates for each notice type. Notices include newspaper publication, posted signs, and mailed letters to affected property owners within a defined radius. Tulsa Planning Office will provide the required formatting for each notice type. The software should include the ability to merge case information entered at intake with templates for notices to ensure efficient processing of cases and eliminate the need for manual notice creation.

Workflow Management:

Once applications are accepted, the application should notify appropriate staff members of the new record based on responsibility for certain tasks. Staff members can complete the required tasks and update the status within the application. Once tasks are completed, certain case information can be published for public viewing as a pending case and linked to the appropriate agenda item.

Following a final decision on applications or cases, staff must be able to update the case status to reflect any possible actions taken. Decided cases should remain available for both staff and the public and include links to relevant documents or information.

Public Access to Information & Online Submittals:

The software solution should include a branded public-facing element that allows members of the public to view pending and completed cases based on location or hearing date and obtain basic information about the case. As cases complete the process and case statuses are updated by staff of the Tulsa Planning Office, that information should be reflected on the public information site. Compatibility with WordPress is preferred due to existing website configurations.

Beyond accessing basic case information, the new software should include an application portal where applications and required attachments can be submitted online for review by a staff member. Staff should have the ability to review and respond to any application submitted online before determining the case has been accepted for processing. Once the case is accepted, staff can create a new case record via the intake requirements listed. Solutions for payment processing via the online portal should be included in all proposals to determine compatibility with existing payment systems. Square is the preferred option due to existing payment system configuration.

Reporting:

For purposes of annual reporting, the software solution must include the ability to generate reports on case activity that can be date or range specified to include the number of cases submitted for each type.

Integration Capabilities & Legacy Data:

1. All historical data including prior case history and location must be migrated into the new system as part of the implementation. A backup of the existing database will be provided by the Tulsa Planning Office.
2. Ability to integrate and display GIS data provided by the Tulsa Planning Office.
3. Compatibility with all modern web browsers with a strong preference for mobile responsiveness.
4. Report generation compatible with Microsoft Excel or common database formats.

Technology Requirements:

Proposals must identify server needs for implementation and provide a scope of maintenance and upgrades to ensure functionality as upgrades and software updates are implemented. A description of how the software will interface with ESRI GIS and ESRI Online systems must be included with all proposals.

Include a description of scalability and redundancy built-in to the system to avoid unexpected outages and maintain a high level of functionality with automated system-generated backups.

Describe modifications to system that can be made by Tulsa Planning Office staff and features that will require provider support. Staff should have the ability to make changes to all forms, templates, and fees as updates occur.

Implementation:

Provide an outline of all project phases that includes a description of tasks performed and estimated times of completion for each task. Define all responsibilities of the Tulsa Planning Office for each phase of the project.

- Provide a project team list that includes individuals overseeing the project
- Describe the process of discovery that will be utilized by the provider and how information will be collected
- Identify any 3rd party software or services recommended as part of the proposal
- Include an outline of training provided as part of implementation and include in project cost
- Describe the testing and acceptance process for the final product

Support & Maintenance:

Provide details of support availability following implementation including response times. Detail ongoing support costs or include a description of how support is factored into project cost.

Qualifications:

Include a profile of the vendor company to include:

- Years of experience and company size
- Relevant experience related to the RFP and provide examples of completed projects
- Resumes for individuals working on the project
- References for relevant completed projects

Schedule:
All vendors must provide a schedule for project completion and implementation.

Cost:
Provide a cost proposal to accomplish the needs set out in the RFP. Identify one-time costs and recurring costs and provide a detailed description for each. Identify any relevant options not included in the base costs but offered by the provider for consideration.

Submittal Guidelines & Requirements:
Proposals must be submitted to the Tulsa Planning Office and include responses to each component of the RFP. Proposals must be received by 2/11/2022 at 5:00 p.m. CST to be considered.

All proposals should provide demonstrations with a strong preference for hands-on staff testing.

For more information on the Tulsa Planning Office please visit tulsaplanning.org.

Links to existing application forms and resources for the Tulsa Planning Office can be found at: tulsaplanning.org/resources/forms-applications/

By request, a staff member from Tulsa Planning Office can provide a demonstration of current systems and answer any questions related to the RFP.

Requests for information or questions can be sent to Nathan Foster, Senior Planner, at nfoster@incog.org.

Final proposals must be submitted to nfoster@incog.org.

Deliverables:
- o Vendor profile and assigned staff member information
- o Detailed description of proposed solution software and features meeting requests of the RFP
- o List of technology requirements as defined in the RFP
- o Development and implementation schedule
- o Acceptance and development checkpoints for project completion
- o Cost breakdown including one-time and recurring costs