

Request for Proposals: Software Solution and Technical Assistance to Support Permit Streamlining for Heat Pump Equipment



Agenda

1. Program overview and scopes of work
2. Qualifications, contracting, and proposal requirements
3. Q&A



Program Purpose

- Simplify permitting for heat pump water heaters and heat pump HVAC installations
- Help participating AHJs prepare for and comply with SB 222 and upcoming Air District Rules (9-4 and 9-6)
- Reduce permitting delays and administrative burden for AHJs and contractors
- Improve inspection readiness and consistency across jurisdictions
- Facilitate standardization of heat pump equipment permitting practices across the region
- Reduce heat pump equipment installation costs



Scopes of Work

Scope A: Permit Streamlining Software

- ❖ Develop and design automated online permit application and back-end interface
- ❖ Support AHJ workflow through inspection and permit close
- ❖ Prioritize contractor and AHJ user experience through advanced automation
- ❖ Engage with AHJs, contractors and other SMEs to ensure critical needs are met

Scope B: Technical Assistance

- ❖ Document and align requirements between AHJs, where feasible
- ❖ Facilitate compliance for SB 222 for AHJs
- ❖ Create online resources
- ❖ Provide stakeholder training and education
- ❖ Coordinate to support software adoption



Scope A: Software Functionality

Required capabilities

- Ability to provide instant permit approval for standard projects when information is complete and correct
- Create automations to reduce time spent on applications, errors, and iterations
- Offer a standalone permitting pathway for all participating AHJs
- Support virtual inspection processes and tools
- Address accessibility, privacy, and cybersecurity needs

Preferred capabilities

- End-to-end integration with existing AHJ permit systems
- Built-in virtual inspection functionality
- Automated contractor-license and workers' compensation checks, plus structured document uploads



Scope A: Development and Deployment

- Assess AHJ workflows, existing systems, integration capabilities, and technology requirements
- Engage building officials, permit technicians, inspectors, IT staff, contractors, and code experts
- Validate workflows and decision rules with Ava-approved representatives
- Complete testing and acceptance before production release
- Support AHJ deployment, onboarding, training, and system administration



Scope B: Technical Assistance

- **Support Regional Standardization:** Coordinate between AHJs to adopt the same or similar best practices for permit streamlining
- **Assess needs:** Identify knowledge gaps, implementation barriers, and readiness for automated permitting
- **Improve processes:** Help AHJs simplify requirements and adopt consistent regional practices
- **Train users:** Provide training for building officials, permit staff, inspectors, and contractors; Incorporate software in training
- **Support inspections:** Develop practical resources, example installations, and documentation standards
- **Maintain resources:** Create accessible online resources and update them as requirements change



Scope A: Minimum Qualifications

- At least one comparable web-based product successfully deployed in production
- Government-agency use and at least 500 permits, applications, or comparable records processed
- Experience integrating software with two or more third-party systems
- Experience implementing cybersecurity, privacy, accessibility, and data-management controls
- Qualified personnel and organizational capacity to develop, host, maintain, and support the product



Scope B: Minimum Qualifications

- At least one comparable permitting, code-compliance, or local-government process-improvement project
- Experience with California local governments, building departments, regulatory agencies, and contractors
- Personnel with heat pump expertise and knowledge of applicable California codes
- Experience producing training, guidance, checklists, or educational resources
- Capacity to facilitate broad stakeholder engagement



Award Approach and Team Structure

- While both scopes may be awarded together, Ava anticipates two separate contracts awarded for Scope A and B
- Combined subcontract value, including lower-tier subcontracts, may not exceed 20% of the contract's total value
- Opportunity for multi-CCA collaboration for Scope A
 - Ava is engaged with other CCAs to join on a cost sharing basis



Contract Term and Ongoing Responsibilities

- **Initial agreement(s):** Two years
- **Extension option:** Up to three additional years, at Ava's discretion
- **All consultants:** Provide ongoing status reports and use of Ava's prescribed project-management software (Asana)
- **For Scope A:** Maintain software availability, updates, maintenance, and customer support for at least five years after the agreement expires



Cost Proposal Requirements

Both Scopes

- Total proposed cost
- Lump-sum pricing by deliverable or milestone
- Unitary Costs for AHJ engagements
- Applicable time-and-materials costs and hourly rates
- Costs must align with the SOW task items and schedule

Scope Specific Pricing for Scope A

- Baseline software-development cost independent of AHJ participation
- Cost per integration with permit management



Proposed Permit Streamlining RFP Timeline

	ACTION	DATE
1.	ISSUANCE OF RFP	October 21, 2026
2.	PROPOSER WEBINAR	October 30, 2026
3.	DEADLINE FOR QUESTIONS/CLARIFICATIONS	November 4, 2026
4.	QUESTION RESPONSES POSTED ONLINE	November 6, 2026
5.	DEADLINE TO SUBMIT PROPOSALS	11:59 p.m., November 23, 2026
6.	PROPOSAL EVALUATION	Nov. 24 – Dec. 4, 2026
7.	FINALIST SELECTION/INTERVIEWS (IF ANY)	December 7, 2026
8.	FINAL NEGOTIATIONS AND/OR BEST AND FINAL OFFER	December 11, 2026
9.	AWARD OF CONTRACT BY BOARD OF DIRECTORS	February 17, 2027*

*Award date contingent upon contract negotiations and legal review.



Proposal Evaluation

	EVALUATION CATEGORY	POINTS
1.	QUALIFICATIONS AND RELEVANT EXPERIENCE	17.5
2.	TECHNICAL APPROACH AND UNDERSTANDING	25
3.	SCOPE, DELIVERABLES, AND PROJECT MANAGEMENT	15
4.	ONGOING SUPPORT AND ADAPTABILITY	15
5.	COST AND OVERALL VALUE	15
6.	AVA SPECIAL PROCUREMENT PREFERENCES	12.5
	TOTAL	100



Required Proposal Contents

- Table of contents
 - One-page letter of transmittal
 - Key personnel, team organizational chart, roles, FTE commitments, and resumes
 - Contract-ready scope of work with tasks and deliverables
 - Cost proposal
 - Schedule of tasks, deliverables, and milestones
 - Organization overview, qualifications, and procurement-preference information
 - Client references with current contact information
 - Consultant Services Agreement (Attachment A) template redlines, if applicable
 - oAva does not intend to retain IP for Scope A
- olf you do not have relines to the document, please state that in the letter of transmittal



Submission and Communication Instructions

Proposal deadline: November 23, 2026, at 11:59 p.m.

- Email proposals in PDF or another non-alterable format to **dbertoldi@avaenergy.org**
- One proposal per entity. Alternatives may appear within that response.
- Send written questions by **November 4, 2026, at 11:59 p.m.**
- Check Ava's solicitation page for written responses and addenda
- Identify any claimed confidential material as directed by the RFP



Questions?

Dan Bertoldi
Electrification Program Manager
dbertoldi@avaenergy.org

