



# CITY OF SANTA BARBARA

## COUNCIL AGENDA REPORT

**AGENDA DATE:** June 28, 2016

**TO:** Mayor and Councilmembers

**FROM:** Community Development Department, Public Works Department, Fire Department, and Information Systems Division of Administrative Services Department

**SUBJECT:** Purchase Of A New Permit Tracking System

**RECOMMENDATION:** That Council:

- A. Approve a professional services agreement with Accela, Inc., for the implementation of the Accela Civic Platform System in an amount not to exceed \$899,850 and approve an additional \$121,660 for contingency costs that may be necessary during the implementation;
- B. Approve a License Agreement with Accela, Inc., for the purchase of 150 user licenses for Accela Civic Platform, 50 Mobile user licenses, and unlimited Citizen Access in an amount not to exceed \$213,569;
- C. Approve a Maintenance Agreement with Accela, Inc., for the first year maintenance and support of the Accela Civic Platform system, in an amount not to exceed \$65,858;
- D. Approve a Subscription Agreement for implementation and hosting services with Accela, Inc., for the Right of Way Management application, for a term of five years, in an amount not to exceed \$16,500 for implementation and \$20,813 for hosting in year one, with annual increases of 3.5%;
- E. Transfer \$1,200,000 of Fiscal Year 2017 Capital Outlay Fund appropriations established for this project (\$600,000 in Fiscal Year 2016 and \$600,000 in Fiscal Year 2017) from Community Development Technology Reserves and the Public Works Technology Reserves to the Information Systems Capital Fund for purposes of consolidating all funds for the project in a single location; and
- F. Appropriate \$1,200,000 in the Fiscal Year 2017 Information Systems Capital Fund for this project.

### EXECUTIVE SUMMARY:

The City's existing Tidemark Advantage Permitting System is a critical application for the management of land development and code enforcement cases for the Community Development, Fire, and Public Works departments. The current system was implemented in 1994 and it has not been possible to upgrade it for many years. It is based on old

technology, is difficult to use, has few features compared to modern systems, and has experienced operational and functional problems and issues with new versions of Windows operating systems.

In Fiscal Year 2015, a project to replace Tidemark Advantage was given a high priority and a multi-department effort was undertaken to conduct a comprehensive Request for Proposals (RFP) process to replace this outdated legacy system. The project team consisted of members from the Information Systems Division and the Community Development, Public Works, and Fire Departments. The team unanimously chose the Accela Civic Platform to replace Tidemark Advantage System with Woolpert, Inc. to provide the professional implementation services.

The Accela Civic Platform not only addresses the limitations of the current system, but also provides many new features needed by the City to better conduct its business. The price of the new system's software, implementation, and first year maintenance costs and subscription fees is \$1,216,590 and, with a contingency allowance of \$121,660, totals \$1,338,250.

The Accela Civic Platform first year technical support and maintenance fee is \$65,858 and is included in the total purchase cost shown above. By comparison, the current annual maintenance and support fee for the Tidemark system is \$61,000. The Right of Way Management (ROWM) application is hosted by Accela. Its annual fee, including technical support and maintenance, is \$20,813 for the first year and is included in the total purchase price shown above. During contract negotiations, Accela agreed to limit the annual increase for the maintenance and subscription fees for the next four years to 3.5%, rather than the normal 10% increase limit.

## **DISCUSSION:**

### **Background**

The City of Santa Barbara implemented the Tidemark Advantage system in 1994. This system is used to manage land development and code enforcement cases, to issue building, planning, and Public Works permits, and to create agendas and minutes for board and commission meetings related to Land Development. The City issues approximately 3,000 building permits and approximately 2,000 planning permits each year, and handles approximately 1,500 code enforcement cases. The City collects approximately \$5.6 million in fees annually through the system.

Tidemark Corporation was purchased by Accela, Inc. in 2001. Accela has continued to provide the City with basic support for this legacy system, but the software is past "end of life" and is no longer being maintained for bug fixes or the development of new features. Tidemark Advantage provides basic case management features, but does not include modern functionality such as electronic workflow and digital plan review. The application requires the installation of a "thick client" on the user's workstation, with an

interface that is difficult to use and does not include basic text editing, reporting, or search tools.

Around 2010, it was realized that Tidemark Advantage would no longer meet the City's needs, when a software upgrade altered a critical field used for the creation of agendas and minutes. The decision was made to remain on the older version of the software in order to preserve the functionality that would be lost in the upgrade. The City has continued to use this version of Tidemark Advantage until sufficient funding was available to replace it.

In 2011, the City began the process of defining the functional requirements desired in a new permitting system, in preparation for developing an RFP to select a replacement for Tidemark Advantage. The selection process was put on hold while the City implemented a new Financial Management System. The project was prioritized in Fiscal Year 2015, with the formation of a Steering Committee, made up of staff from Community Development, Public Works, Fire Department, and Information Systems. A core team was selected with members from each of these departments and the Information Systems Division to develop the functional requirements for a new system and issue the RFP.

The RFP was issued to fourteen pre-qualified vendors and four proposals were received. The proposals were reviewed, and three vendors were selected to provide two-day presentations and demonstrations of their company's viability and software functionality to the project team. After this initial round of demonstrations, the team selected Accela Civic Platform and SunGard TRAKiT as the semi-finalists. Both semi-finalists provided additional demonstrations and the team met with reference clients for both vendors. Based on this assessment, the project team unanimously concluded that Accela Civic Platform was the product that best meets the City's needs for a Permit Tracking System.

### **Selection of Accela Civic Platform Permit Tracking System**

Accela Civic Platform software not only addresses the limitations of the current Tidemark Advantage System, but provides many new features needed by the City to better conduct its business. Some of these are:

- Electronic Plan Review will allow applicants to submit plans without printing.
- Mobile Inspection Management for field use by City inspectors.
- Right of Way Management module to assist in permitting, coordinating, and communicating both private and City projects/events on our streets via a cloud-based map.
- Familiar and easy to use Internet browser interface that works with all browser platforms.
- "Dashboards" that deliver personalized business functionality and information to specified staff.
- Easy-to-use reporting tools for non-technical staff.

- Information is easily transferred to Microsoft Word and Excel for custom reporting, analysis, and the generation of letters.
- Integration with Microsoft Outlook for contact management and scheduling functions. Permits and reminders can be emailed directly to applicants.
- Electronic workflow that improves productivity by reducing time spent waiting for status and approvals for applications, plan review, and enforcement cases.
- Integration with the City's Centralized GIS for parcel information and mapping features. Staff will be able to view case information and create cases directly from a map view.
- Integration with the City's document and agenda management system, Hyland OnBase, for the storage of case documents, permits, plans, etc. and the creation of agendas and minutes for public meetings.
- ADA compliant web portal for citizen access to apply for permits, schedule inspections, pay fees, check on case status, and report code enforcement violations.

### **Project Implementation Timeline**

The project implementation will require approximately thirteen months to complete. It is scheduled to begin in October 2016 with a planned go-live in December 2017.

### **BUDGET/FINANCIAL INFORMATION:**

The total cost of this project, including software licensing, professional services to implement, first year's maintenance and support, first year ROWM subscription, contingency, and staff backfill is estimated to be \$1,735,250. Community Development and Public Works staffing backfill is needed to allow existing staff to devote a sufficient amount of time and effort to the project during the thirteen-month implementation period.

<u>Project Cost Item</u>	<u>Amount</u>
Professional Services	\$916,350
Software Licensing	213,569
Maintenance & Support – First Year	65,858
ROWM Subscription Fee – First Year	20,813
Contingency	121,660
<b>Subtotal</b>	<b><u>\$1,338,250</u></b>
Staff Backfill	<u>397,000</u>
<b>Grand Total</b>	<b><u><u>\$1,735,250</u></u></b>

In addition to the acquisition and implementation costs, the City will be required to pay an annual support and maintenance fee for the Civic Platform System and an annual

subscription fee for the Right of Way Management application. The first year's maintenance and support and subscription fees are included in the project costs above.

It is important to note that, during contract negotiations, Accela agreed to discount the software by 35% and Accela will provide support for the legacy Tidemark Advantage System for the duration of the Civic Platform System implementation at no charge. City staff also negotiated a reduction in the normal increase in maintenance and support and ROWM subscription fees in the second through fifth years to 3.5% maximum instead of the normal 10% limit. The total fees will not exceed the amounts shown below:

<b>Year</b>	<b>Maintenance &amp; Support</b>	<b>ROWM Fee</b>	<b>Increase</b>
2	\$68,163	\$21,541	3.5%
3	70,549	22,295	3.5%
4	73,018	23,075	3.5%
5	75,574	23,883	3.5%

Maintenance fees for Years 2 to 5 are not included in the project budget and will be paid out of the Technology Reserves beginning in Fiscal Year 2018.

The project cost totaling \$1,735,250 will be incurred over a two-year period through Fiscal Year 2018. The project will be funded from a combination of existing reserves accumulated from a Technology Fee added to permit fees, and revenues from the Technology Fee in Fiscal Year 2017 and through Fiscal Year 2019. Beyond that, ongoing costs for maintenance & support, Right of Way Management (ROWM) Fees and other costs, which in total range from approximately \$29,000 to \$40,000, will be paid from future revenues from the Technology Fee estimated at \$287,000 per year.

The City began charging a technology fee on all permits issued starting in 1999 to cover the cost of maintenance and support for current systems, including the Tidemark Advantage System, and for future technology needs. The Technology Reserve balance, plus estimated revenues in Fiscal Years 2017 and 2018 from the Technology Fee, will be sufficient to cover most of the project cost, with the balance covered by Information Systems Capital reserves in Fiscal Year 2018. Information Systems Capital reserves will be reimbursed from future revenues from the technology fee starting in Fiscal Year 2019.

#### **SUSTAINABILITY IMPACT:**

Accela will integrate with the Hyland OnBase Electronic Content Management System to store electronic copies of the documents it generates, such as permits and letters; thereby reducing the need to print them on paper, distribute multiple copies, or store them in file cabinets.

Accela's digital plan check module will eliminate the need for applicants to print plans for review by City staff. Electronic plans will be uploaded into the Hyland OnBase

system, eliminating the need for staff to scan them into OnBase and store the original paper plans in filing cabinets.

The Citizen Access Portal will allow applicants to conduct business through the internet, reducing the number of visits to the public counter, thereby reducing the vehicular traffic to and from City facilities.

Mobile inspection applications will allow City staff to more efficiently plan routes and respond to new requests for inspection while in the field. Staff will be able to issue permits in the field as needed via email, eliminating the need for return trips and reducing the cost of printing to the city.

A copy of the contract/agreement is available for public review in the City Clerk's Office.

**PREPARED BY:** Maryanne Knight, IT Project Manager

**SUBMITTED BY:** Kristy Schmidt, Administrative Services Director

**APPROVED BY:** City Administrator's Office