

# City of San Leandro

## Information Technology

Addendum to Request for Quote  
for  
**Accela Development**  
(Reports and Configuration Changes)

### Proposal Submission:

Thursday, June 30, 2016



21Tech CONFIDENTIAL



21Tech, LLC  
1330 Broadway, Suite 701  
Oakland, CA 94612  
415.355.9090

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June 30<sup>th</sup>, 2016

**City of San Leandro**

**Information Technology**

835 East 14<sup>th</sup> Street  
San Leandro, CA 94577

**Attn:** Tony Batalla

Dear Mr. Batalla,

Please find enclosed our proposal to you regarding the **Addendum to Request for Quote** regarding **Accela Development** for San Leandro's Information Technology department. Our team is honored to be part of your consideration.

We believe an effective partner has to provide expertise in four areas:

- Experience in Municipal Public Sector implementations in general
- Proven Accela-specific experience
- Ability to troubleshoot, problem solve and resolve issues
- Provide exceptional customer service through ongoing communication

21Tech retains highly qualified staff and subject matter experts. We believe that our solution-centric approach to problem solving is a winning one, and a methodology that separates us from many providers.

As a partner with San Leandro's IT department, we look forward to earning your support, trust and respect by providing you with excellent customer services and creative solutions at competitive prices.

If you have any questions, or would like additional information on 21Tech, please contact me:

**Phone:** (415) 355-9090

**Fax:** (888) 715-0285

**Email:** [michael.young@21tech.com](mailto:michael.young@21tech.com)

**Web:** [www.21Tech.com](http://www.21Tech.com)

Sincerely,

*Michael Young*

**Michael Young**

Senior Technical Manager, 21Tech, LLC

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## INTRODUCTION

<b>Vendor Name:</b>	21Tech
<b>Vendor Address:</b>	1330 Broadway, Suite 701, Oakland, CA 94612
<b>Vendor Contact Name:</b>	Michael Young
<b>Vendor Contact Phone Number:</b>	415.355.9090
<b>Vendor Contact Email Address:</b>	Michael.Young@21tech.com
<b>Date of Proposal Submitted to the City</b>	06-30-2016

### WHY 21TECH?

21Tech has the pedigree to meet the needs of San Leandro’s Information Technology department with our:

- Unmatched experience with core specialties
- Local presence
- Our understanding of Government
- Our Flexible Approach.

### UNMATCHED EXPERIENCE WITH CORE SPECIALTIES

21Tech has successfully worked on hundreds of municipal projects that range from simple implementations to complex, multi-platform, multi-tenant solutions.

21Tech specializes in Accela solutions for municipal public sector clients. We understand user interface, back-end integration, and reporting needs that are unique to municipal departments. Our staff includes architects, analysts, developers and project managers who are well versed in every part of Accela including but not limited to the following:

#### Skill Sets

- Accela (AA,AMO,AGIS,ACA,APPS)
- GIS
- Report Development
- App Development
- Java Script
- Java
- HTML,VB
- C#, VB.Net
- SSRS, SQL
- Crystal

#### Software

- Accela (All versions 6.5 – 8.0)
- ESRI, ArcGIS
- Database: Oracle 7.2, 9i, 10g, 11i, Microsoft SQL Server (2005-2012)
- Platforms: Microsoft Windows® 95, 98, 2000, XP, VISTA, 7, 8, Sever 2008, Server 2012

Given that this is our strength, we feel confident in providing you with a strong development service combined with experience and leadership you can trust.

#### 21Tech Response:



## WE HAVE A LOCAL PRESENCE

21Tech has successfully implemented at least fifteen software systems within the Bay Area over the last ten years. With this experience comes an understanding of cross-departmental integrations, custom development, data migration, local municipality business and municipal rules and regulations. We have built a strong track record by understanding the importance of partnering with city departments. Projects require a strong partnership that is built, executed and relied upon throughout the implementation cycle. With 21 Tech’s management so close in proximity, we are invested in the success of the Bay Area community. Should an issue ever arise, it is nice to know you can always sit down and have a face to face with your 21Tech partners.

21Tech’s Accela local experiences include:

- City of San Francisco Department of Building Inspections, AA ACA AGIS Implementation
- City of San Francisco Department of Building Inspections, EDMS/ Accela Integration Project
- City of San Francisco Planning, AA ACA AGIS Implementation
- City of San Francisco Planning, EDMS, Accela Integration Project
- City of Oakland, Accela Reports Integration Project
- Accela Headquarters – assist with development work

We feel confident in our Accela team’s ability to develop solutions that will meet the needs of the San Leandro’s Information Technology department.

## WE UNDERSTAND GOVERNMENT

A municipal government has requirements and unique issues that differ from the private sector. 21Tech acknowledges this and has experience where private sector services companies may underestimate the differences. In our many years of working with municipalities we understand how to work with Subject Matter Experts from other departments to coordinate access to backend proprietary systems. It is our belief that success is in the details, and that with our municipal experience we have those details well in hand.

21Tech specializes in government services. Our three major verticals are Land Management, Asset Management, and Taxation – all of which are in government. We understand the nuances of working with government departments, and the level of involvement needed.

## OUR FLEXIBLE APPROACH

We like to approach solutions holistically – looking at the best options for the customer, not just for this solution, but possibly creating an environment or building blocks for applications that can be added to or interacted with years from now. This is why we offer the “**health assessment**” to our partners so you can move forward with the confidence and assurance that all your needs are being addressed not just the ones on the surface.

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### 21Tech Response:





## ABOUT 21TECH

Established in 1996, 21Tech brings more than 18 years of experience as a systems integrator implementing Commercial Off the Shelf (COTS) software packages like Accela. Our experience also includes software application development, business intelligence and data warehouse implementations, customer relationship management (CRM), enterprise asset management (EAM), telecommunications, workflow and project management.

Our extensive industry experience includes working with public sector clients such as the City and County of San Francisco, the State of California, the cities of Indianapolis, Chicago, Portland, and Las Vegas. Our experience with the private sector includes companies such as AT&T, Accela, Avaya, Infor, Microsoft, Oracle, Unisys, IBM Global Services, Franklin Templeton, Thompson Reuters, and Charles Schwab.

Municipalities and state agencies create a substantial percentage of our business because 21Tech adeptly addresses unique challenges in providing COTS implementations, strategy services, and general IT professional services. Regardless of the project, our goal is simple: the end result is easy to use, easy to expand and efficient for our client. We pride ourselves in our accessibility to our clients, and our ability to gain and maintain their trust. We truly understand that all projects have challenges. How we deal with such challenges and work with our clients to a successful resolution sets us apart from our competitors.

21Tech has developed a close working relationship with Accela starting in 2006. We are a Certified Accela Reseller and Implementation Partner. We have worked on several projects with them over these past eight years, and have developed a deep understanding of the many Accela Automation modules.

Our project experience includes implementations of the following:

- Program/Project Management
- Permitting Solutions
- Land Management Applications
- Asset Management Solutions
- Taxation and Revenue Solutions
- Data Warehouse and Dashboarding
- Business Licensing
- Vendor Management
- GIS Services and Solutions
- Workflow Management System
- Customer Service and CRM Applications
- Web Services
- Data Conversion
- Infrastructure and Facility Services
- Custom Application Development
- SharePoint/AD
- Enterprise Content Management
- System Conversion/ Upgrade

## Accela Permitting, Licensing, Building and Planning Expertise

21Tech provides business analysis, data migration, reporting, configuration and interface services for the Accela permitting and licensing software solutions to support Building, Planning and other city and state departments. The needs of the client involve complex legislature, business rules and parallel path workflow regarding planning and zoning, obtaining building permits, processing and recording building inspections, as well as recording complaints and property liens. These software

solutions are therefore highly configurable to the customized needs for each client and interfaces with other city department's solutions are required. As such, strong implementation strategies and project management are a requirement for successful implementations.

### Summary

We seek to offer the best user experience possible within Accela, so we focus on the details when it comes to form portlet design and the presentation of lists. Our staff is well versed in leveraging data filters and writing QuickQueries to ensure that the appropriate users are able to interact with the appropriate records, and have an aesthetically pleasing experience while performing data entry and querying the system.

We place a high value in the integrity of an Accela system. Our staff works exhaustively with our clients to make sure that user groups have the proper security settings, which are often controlled by Function Identifiers (FIDs) and sometimes through Standard Choices. When implementing Accela, we consider how functionality should be made available at different hierarchies, such as by user, user group, module, and/or agency-wide.

Thanks to our depth of working knowledge pertaining to Accela, we are proficient and have experience configuring some of what might be classified as the "deep" features within the platform. These include useful but often overlooked functionality, such as the asset management module, Smart Charts, time accounting, structures and establishments, ASI drill-downs, and sets.

### *Experience with Accela Modules*

- Accela Automation: Land Management
- Accela Automation: Asset Management
- Accela Automation: Service Requests
- Accela Citizen Access
- Accela GIS
- Accela Mobile Office
- Accela Inspector App (iOS and Android)
- Accela Code Officer App (iOS)
- Accela Work Crew App (iOS)
- Accela Analytics App (iOS)

### *Accela-Related Presentations*

- Inspection Scheduling Across the Accela Platform  
(Presented at Accela Engage 2015)
- (Class) Batch Scripting 101  
(Presented at Accela Engage 2015)
- Managing a Self-Hosted Environment  
(Presented at Accela Engage 2014)
- How to Keep Up with the Upgrades  
(Presented at Accela Engage 2013)

### *Conferences and Meetings Attended*

- Accela Engage 2015 (Los Angeles, CA)
- Accela Engage 2014 (San Diego, CA)
- Accela Engage 2013 (San Diego, CA)
- Accela User Conference 2012 (San Diego, CA)
- Accela User Conference 2011 (San Diego, CA)
- Accela User Conference 2010 (Anaheim, CA)
- Accela Regional User Group Meetings  
(Various / Online: 2012-Present)
- Accela Asset Management User Group  
(Fort Worth, TX: Feb 2014)

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### **21Tech Response:**



## 1. OUR TEAM

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### 21TECH TEAM

#### 21Tech Development

<i>21Tech Team:</i>	Business Analysis	Config.	Scripting	Reporting	GIS	Technical Architecture	Data Migrations	Gov. Sector	Training
1. Michael Young	✓	✓	✓	✓	✓	✓	✓	✓	✓
2. Leah Fortune	✓	✓	✓	✓	✓	✓	✓	✓	✓
3. William Flynn	✓	✓	✓	✓	✓	✓	✓	✓	✓
4. Weldon Crabb	✓	✓		✓				✓	✓

### STAFF EXPERIENCE AND RESUMES

**MICHAEL YOUNG, Sr. Technical Manager**

<i>21Tech Team:</i>	Business Analysis	Config.	Scripting	Reporting	GIS	Technical Architecture	Data Migrations	Gov. Sector	Training
<b>Michael Young</b>	✓	✓	✓	✓	✓	✓	✓	✓	✓

Michael Young is a member of 21Tech’s professional services team, and has over 17 years of experience in the information technology field. In addition to managing several IT organizations, he has very extensive knowledge in Accela. Mr. Young has spent the last 10 years as a public sector consultant focused on Accela implementation for city, county, and state governments. Michael is the Senior Technical Manager for 21 Tech’s Accela team. Prior to joining 21tech Mr. Young was Systems Manager managing an Accela team for a major metropolitan city. Michael has presented at the Accela national conference for the last 6 years. Most recently co-teaching a batch scripting class at the 2015 Accela Engage Conference. He has a wide range of experience in Accela implementation including, AA, ACA, AMO and AGIS. He has also earned his Six Sigma yellow belt developing a Six Sigma Accela Upgrade Process. He is also a .net developer and has developed several interfaces for various Accela integrations components.

Recent projects include:

- ◆ Mr. Young provided the Department of Planning with technical consulting services pertaining to the selection, implementation and integration of an Accela EDMS solution and document management suite for a combined City/County on the West Coast. Responsible for documenting business processes, advising clients and colleagues about software best practices, and developing a decision matrix for product selection. Mr. Young assured the integration could be completed with Automation, Citizen Access, and AccelaGIS. He identified and addressed budgeting and contract issues with selected products, provided an interface template for integration with Automation and facilitated user acceptance testing and training on product selection.
- ◆ Mr. Young provided a large city county government with technical consulting services for the implementation of Accela Master Script 3.0 upgrade. The custom nature of the specific agency’s integration required a great deal of knowledge of Accela scripting. Mr. Young was able to customize and integrate a complete solution that allowed for seamless integration and operation. He was also able to develop, implement and integrated VSN server solution to allow for a complete versioning system for the entire agency.
- ◆ Mr. Young managed an integration for a major metropolitan city’s development effort when the sewer system was sold to a private company. He led an Accela development team to divide a previously integrated Accela system into multiple modules. During this project he was able to successfully architect and develop a solution that had been previously thought of as impossible before. The solution allowed the individual modules to use Multiple EDMS Solution

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based on record types. The documents could be stored in one or many locations. This innovative new type of interface allowed these agencies the ability to share resources while maintaining their separate status.

- ◆ Mr. Young managed a team to evaluate and develop a new and improved way to deploy upgrades to the Accela System. This process allowed for Six Sigma processes to be incorporated to the Accela upgrade process. The newly developed upgrade process provided the agency with a significantly more efficient process, less down time, and less overall cost for the agency during and after the upgrade.
- ◆ Mr. Young was project manager during the Implementation of Accela Licensing into a city/county government agency. He was responsible for collecting user requirements, developing project work plans, developing and monitoring project schedules, assessing and mitigating risks, procuring resources, managing project teams, developing performance metrics for project milestones, developing reports, reporting on project progress, and documenting lessons learned. He also provided technical training and mentoring to staff.
- ◆ Mr. Young was the chief technical resource for the Accela Implementation for a city/county IT Department responsible for maintaining and providing all Accela services to its client. Mr. Young served as the subject matter expert on a long term engagement providing a variety of services. His responsibilities included extensive configuration of; Automation, Citizens Access, Mobile Office, App Development, Interface development, Script writing (EMSE, Batch, and Master), Expression development, developing best practices, report development, GIS updates. The agency also required the development of an integrated change control system to keep track of all changes in Accela. Mr. Young was also responsible for customer service of the agency's clients maintaining a perfect record and maintaining and exceeding every SLA.
- ◆ Mr. Young attended Purdue University where he majored in Computer Information Technology and Minored in Organizational Leadership. Mr. Young also has several certifications in the IT field including; FileNet Administration, Microsoft Certified SharePoint Developer, Altiris/Wise Repackaging, Organizational Leadership, and A+ Certifications.

## Michael C Young

Senior Technical Manager 

Michael has seventeen years of experience in Information Technology, balanced between private industry and the government sector. He has managed several IT organizations starting with his own company in the late 1990s. In 2003, Michael moved into a Director of IT role for a world-wide manufacturing company. After several years, he moved to a government consulting role with Daniels Associates Inc. He was in that role for the last ten years. In that role he has managed the Accela system for the City of Indianapolis since 2008 as their systems manager.

Michael has presented at the Annual Accela Engage Conference in 2010, 2011, 2012, 2013 and 2014 (Michael co-taught a breakout session in 2015 on Batch Scripting). He has presented on several topics including: Managing a Self-Hosted Environment; How to Upgrade Accela; and Best Practices of Script Writing.

**Specializations:** Systems Integration; Project Management; Writing Interfaces; Giving Presentations; Team Management; Records Management; License Management;

**Industries:** Government (Local and State); Utilities (Water, Wastewater, Gas); Transportation; Public Works; Land Records; Water Resources

### Accela Implementation Experience

- 6+ years of experience administering and consulting with the Accela system (AA, ACA, AMO, AGIS, Apps)
- 5+ years of experience in report writing against Accela's data model using Crystal Reports 2008 and SSRS 2008
- 6+ years developing interfaces using govxml
- 17+ years managing implementation teams for various software integrations
- Requirements gathering and business analysis
- Specifications gathering for configuration and reports
- Writing custom functions, expressions, and event scripting
- Applications: Permitting, Planning; Code Enforcement; Inspections; Licensing; Work Orders; Service Requests
- Administration of self-hosted environments
- User Training (AA, ACA, AMO, AccelaGIS, Apps)
- 6 Years Attending and Presenting at Accela National Conferences; User Group; Frequent contributor to Accela Community

### TECHNICAL EXPERTISE

**Accela Automation (All versions from 6.7 to 7.33) :** AA, AMO, ACA, AGIS, Gateway, Self-Hosting, Record Type Configuration; Workflow Design; Fee Schedule Implementation; ASI/ASIT Design; Form Portlet Design; Security; Calendaring / Inspection Scheduling; Conditions; Master and Custom Scripting using (version. 1.4 - 3.0); Batch Scripting; Multiple Types of Interfaces (Payment Interfaces, EDMS Interfaces, and other govxml based Interfaces)

**Productivity Software:** Word, Excel, PowerPoint, Access, Publisher, Outlook, Visio

**Scripting / Languages:** JavaScript, VisualBasic.NET, C#, SQL, Ideal, Cobal.

**Database:** SQL Server

**Reporting Applications:** SSRS 2008 R2, Crystal Reports 2008

**Content Management System:** Microsoft SharePoint

**Project Management:** Microsoft Project 2007

### PROFESSIONAL EXPERIENCE

Senior Technical Manager 21Tech, San Francisco, CA	Oct 2015 to Present
Accela Systems Manager Daniels Associates Inc. / City of Indianapolis, IN	July 2005 to Oct 2015
Director of Information Technology Stratis Corporation, Indianapolis, IN	Feb 2003 to July 2005
Owner / Software Architect Young Consulting, Indianapolis, IN	Dec 1998 to Feb 2003

### EDUCATION

Computer Information Technology Major  
Organizational Leadership Minor  
Purdue University, 1997 - 2005

AAS, Computer Information Technology  
Purdue University, 2004

### CERTIFICATIONS

FileNet Administration Certification  
FileNet / July, 2009

SharePoint Developer Certification  
Microsoft / May, 2009

Altiris / Wise Repackaging Certification  
Wise Certification / February, 2007

Organizational Leadership Certification  
Purdue University / May, 2004

Information Technology Certification  
Purdue University / December, 2002

A+ Certification  
Purdue University / May, 2000

**LEAH FORTUNE, Accela Content Manager**

<i>21Tech Team:</i>	Business Analysis	Config.	Scripting	Reporting	GIS	Technical Architecture	Data Migrations	Gov. Sector	Training
<b>Leah Fortune</b>	✓	✓	✓	✓	✓	✓	✓	✓	✓

Leah Fortune is a member of 21Tech’s professional services team, and has over 5 years of experience in Accela consulting, project management, change control integration, report writing, and quality assurance. Ms. Fortune has extensive experience with permitting and licensing systems at various levels of government in the public sector, and is a Lead Analyst on 21Tech’s Accela team. Ms. Fortune is also responsible for closely working with clients and partners to ensure strong results through proper expectations and guidance. Prior to joining 21Tech, Ms. Fortune spent three years administering and configuring two separate full-scale Accela implementations for state agencies.

Recent projects include:

- ◆ Ms. Fortune provided departments of building inspection and planning with technical consulting services pertaining to the implementation of its Accela land management suite for a combined city/county on the West Coast. Responsible for documenting business processes, advising clients about Accela best practices, performing extensive configuration within Automation, Citizen Access, and writing scripts automating routine to complex actions based on analysis of client-provided logic, developing Crystal reports, facilitating user acceptance testing and training sessions, developing user guides and reference materials, and documenting lessons learned.
- ◆ Ms. Fortune served as a Subject Matter Expert for Accela Citizen Access Implementation of Health Care and Professional Licensing for a state agency. Responsible for developing project plans, tracking project progress, engaging stakeholders, reviewing deliverables from consultants, training and practicing regular knowledge transfer with professional staff of nine programmers and support staff. Evaluated change requests for Accela Automation configuration, scripting, and reporting needs, providing business need analysis and solution options, creating work plan and user testing plan documents, estimating delivery date, and executing the plan.
- ◆ Ms. Fortune was key in developing and implementing a Change Control Process between client and their internal IT staff for a state agency. Responsible for streamlining operations and business process reengineering using data and interview driven analysis, and reducing waste based on IT usage and policy. Developed Business Intelligence for IT assignment tracking.
- ◆ Ms. Fortune administered and configured a comprehensive self-hosted Accela implementation for a state agency, including Land Management, Licensing, AccelaGIS, Accela Mobile Office, and Accela Citizen Access. Responsible for overseeing full design of record types and inspections, configuration (i.e., FIDs, Standard Choices, event-driven customization (expressions, scripts, and custom functions), workflows, data validation, establishing interfaces to GIS and payment systems, report writing, and user training. Developed Business Intelligence to comply with Public Information Act.
- ◆ Ms. Fortune served in the capacity of Data Management project manager during archival and conversion of statewide boiler program records for a state agency. Responsible for developing project work plans, identifying and consulting with stakeholders, collecting user requirements, developing and monitoring

**21Tech Response:**



project schedules, procuring resources, managing project teams, assessing and mitigating risks, performing quality control, developing performance metrics for project milestones, reporting on project progress, and documenting lessons learned. Provided technical training and mentoring to staff of six professionals. Daily work involved extensive quality assurance / quality control and data analysis.

- ◆ Ms. Fortune received Bachelor of Arts (B.A.) emphasizing research and communications from Carroll College, Helena, Montana.
- ◆ Ms. Fortune is a certified Project Management Professional (PMP).



## Leah Fortune, PMP

Accela Content Manager 

Ms. Fortune has 15 years of experience in Content Management, balanced between public and private sector positions. The past six years, she has worked exclusively with the Accela Enterprise Solution, working with small teams to implement multi-faceted solutions for jurisdictions of over one million public users. Ms. Fortune is an expert at using business process analysis, design, and redesign to help clients understand their organizational needs, and determining how those goals are best translated into enterprise software via configuration, customization and integration approaches. She manages overall content to ensure the use of repeatable processes and general efficiency.

Leah's experience includes documenting business processes, advising clients about best practices, performing extensive configuration within Automation, Citizen Access, and writing scripts automating routine to complex actions based on analysis of client-provided logic, developing Crystal reports, facilitating user acceptance testing & training sessions, developing user guides & documenting lessons learned. She is also responsible for managing client expectations and sign-off, and supporting and nurturing client/user buy-in.

**Specializations:** Systems Integration; Project Management; SSRS Reports; Crystal Reports; System Configuration, Accela Database Model, Team Management; Records Management; Content Management; Risk Management

**Industries:** Government (Local and State); Land Management; Professional Licensing; Health Care Licensing; Public Works; Fire Department; Utilities (Water, Wastewater)

### Accela Implementation Experience

- 5 years of experience implementing and administering
  - Accela Platform (AA, ACA, AMO, and Inspector App)
  - 5 years of report development against Accela's Database Model using SSRS 2008 & Crystal Reports 2008
  - Requirements gathering and business analysis
  - Specifications for configuration, scripting, and reports
  - User Training (AA, ACA, AMO, Accela Inspector App)
  - Implementing Content Management Strategy to support data migration & reporting
  - Managing Change Control and Content to mitigate risks
  - Ensuring all content is consistent in terms of style, quality and tone of voice, and optimized for search and user experience for all channels of content including Accela Citizen's Access
  - Creating reusable processes for system efficiency
  - Recognized at the 2012 Accela User Conference for the largest full-scale Citizen Access Implementation
- **Land Management, Licensing, and Custom Configuration:**
    - Workflow Elements and Automation
    - Application Specific Information/Custom Fields
    - Specialized Fee Formulas and Fee Automation
    - Inspection Elements & Calendaring
    - Event-Based Automation
    - Expiration/Renewal Processes
    - Intake Forms and Portlet Designer

### TECHNICAL EXPERTISE

**Accela Automation:** AA, AMO, ACA, AGIS, Gateway, Self-Hosting, Record Type Configuration; Report Configuration; Workflow Design; Fee Schedule Implementation; Custom Fields and Lists Design; Form Portlet Design; Security; Calendaring / Inspection Scheduling; Conditions; Standard Choice Event-Based scripting

**Productivity Software:** Word, Excel, PowerPoint, Access, Publisher, Outlook, Project, SharePoint

**Computer/Programming Background: Management System:** Accela Automation, Accela 360, SQL, JavaScript, Microsoft SQL Server Management Studio, Microsoft Business Intelligence Development Studio, Ralleo, Crystal Reports 2008

### PROFESSIONAL EXPERIENCE

Senior Business Analyst 21Tech, San Francisco, CA	2013 to Present
Accela Systems Programmer State of Montana	2010-2013

### CERTIFICATIONS

PMP Certification  
Project Management Institute, 2015

### EDUCATION

B.A., English and History  
Carroll College, 2004

**WILLIAM FLYNN, Accela Solutions Architect**

<i>21Tech Team:</i>	Business Analysis	Config.	Scripting	Reporting	GIS	Technical Architecture	Data Migrations	Gov. Sector	Training
William Flynn	✓	✓	✓	✓	✓	✓	✓	✓	✓

William Flynn, Ph.D is currently a member of 21Tech’s professional services team, and has over 16 years of experience in technical consulting, IT/GIS management, project management, systems integration, audits, and quality assurance. Dr. Flynn has extensive experience with permitting and licensing systems at various levels of government in the public sector, and is the Lead Architect of 21Tech’s Accela Team. Prior to joining 21Tech, Dr. Flynn spent three years administering and configuring a comprehensive Accela implementation for a municipality in Texas. Dr. Flynn is an active member within the Accela user community, presenting regularly at Accela’s national and regional meetings, having previously served as an officer for multiple regional and product user groups, and continually offers technical solutions and advice on best practices to other users on the Accela Community Forum. He has also been certified by Accela in Scripting 3.0 and recognized as an Accela Implementation Professional (Bronze).

Recent projects include:

- ◆ Dr. Flynn provided departments of building inspection and planning with technical consulting services pertaining to the implementation of its Accela land management suite for a combined City/County on the West Coast. Responsible for documenting business processes, advising clients and colleagues about software best practices, performing extensive configuration within Automation, Citizen Access, and AccelaGIS, writing scripts and custom functions, mapping fields for data conversion, writing reports, facilitating user acceptance testing and training sessions, performing system troubleshooting, developing project plans, and documenting lessons learned. Scripted against a contractor state license board Web service to validate appropriate licenses were held by professionals prior to permit issuance.
- ◆ Dr. Flynn provided independent verification and validation (IV&V) services surrounding the implementation of an advanced metering infrastructure (AMI) deployment for a municipal water and electric utility in Texas. Responsible for quality assurance, audit and oversight of development and integration efforts (included a utility billing/customer information system, computerized maintenance management system, meter data management program, enterprise GIS, and several other metering applications and databases), reporting over project progress, calculating performance metrics, performing spatial analysis to assess the success rate of the mesh network architecture of collectors and nodes and identify suitable locations for additional collectors, review of system hardware and software/database configurations, and documenting findings, anomalies, and recommendations for process improvement.
- ◆ Dr. Flynn single-handedly administered and configured a comprehensive self-hosted Accela implementation for a municipality in Texas, including Land Management, Licensing, Asset Management, AccelaGIS, Accela Mobile Office, Inspector app, Code Officer App, and Accela Citizen Access. Responsible for full design of record types and inspections, configuration (i.e., FIDs, Standard Choices, event-driven customization (expressions, scripts, and custom functions), workflows, data

**21Tech Response:**



validation, establishing interfaces to GIS and payment systems, report writing, and user training. Specific examples of licensing established within Accela included food establishments, drinking establishments, catering services, mobile food trucks, pet licensing, and a variety of professional contractors.

- ◆ Dr. Flynn served in the capacity of technology project manager for a municipal public services department in Texas. Responsible for developing project work plans, identifying and consulting with stakeholders, collecting user requirements, developing and monitoring project schedules and budgets, procuring resources, managing project teams, assessing and mitigating risks, performing quality control, developing performance metrics for project milestones, reporting on project progress, and documenting lessons learned.
- ◆ Dr. Flynn oversaw the operation of a data management branch of a transportation planning and programming division for a state department of transportation. Responsible for supervising a group of eight technical and professional employees who collected, analyzed, and integrated large volumes of data on highways, bridges, and railroad crossings into inventory files and graphic geodatabases. Provided software and data collection training to district field staff, conducted highway performance monitoring system audits in the field, and certified the annual county road mileage to the state comptroller for disbursement of funds to the state's counties. Daily work involved extensive quality assurance / quality control and data analysis.
- ◆ Dr. Flynn served as GIS Manager for a large county in the Southwest, serving as the county's subject matter expert on GIS and geotechnology, and was the architect behind all mapping applications used across the County. Coordinated GIS development with other county departments and outside agencies. Integrated enterprise GIS with other county systems, including Accela PermitsPlus for the development services one-stop shop, as well as public works' work order / asset management system and the assessor's CAMA system.
- ◆ Dr. Flynn served as an internal project manager for its surface water quality division for a state environmental agency. Responsible for developing project plans, tracking project progress, engaging stakeholders, reviewing deliverables from consultants, giving presentations, and performing spatial analysis and hydrologic modeling. Also served on the board of directors for two different GIS steering committees.

Dr. Flynn received a Ph.D. in geography from Oklahoma State University, a Master of Applied Geography (M.A.G.) in GIS and cartography from Texas State University, and a Bachelor of Music (B.M.) in classical guitar performance from California State University, Fullerton. He also holds the certifications of Project Management Professional (PMP), Certified Scrum Master (CSM), and Geographic Information Systems Professional (GISP).

## William Flynn, PhD, PMP, CSM, GISP

William has sixteen years of experience in GIS and Information Technology, balanced between academia and the applied realm. He has served in several levels of government, including state, county, and most recently, municipal. William has applied GIS experience ranging from land records to utilities and surface water modeling to redistricting. He has also taught GIS to high school, community college, and university students over the past decade. Through his GIS roles with various local government agencies, William also came to administer numerous land and asset management systems, while achieving tight integration with enterprise GIS. He is a Project Management Professional (PMP) and Certified GIS Professional (GISP). In Fall 2014, William completed a Ph.D. in Geography at Oklahoma State University.

**Specializations:** GIS; Cartography; Project Management; Land & Asset Management Systems; Database Administration; Systems Integration; Report Writing; Spatial Analysis; Statistics; Quality Control Methods; Giving Presentations; Instruction; Technical Writing; Research

**Industries:** Government (Local and State); Utilities (Water, Wastewater, Electric, and Gas); Transportation; Public Works; Land

### Accelea Implementation Experience

4 years of experience administering and consulting with the Accelea platform (AA, ACA, AMO, AGIS, Apps)

4 years of experience in report writing against Accelea's data model using Crystal Reports 2008 and SSRS 2008

16+ years of GIS experience; Skilled with reciprocal integration between Accelea and Esri, including External Address-Parcel-Owner (XAPO), GIS-based asset management, and mapping Accelea data in ArcGIS.

Requirements gathering and business analysis

Specifications gathering for configuration and reports

Writing custom functions, expressions, and event scripting

Applications: Permitting, Planning; Code Enforcement;

Inspections; Licensing; Work Orders; Service Requests

Administration of self-hosted environments

User Training (AA, ACA, AMO, AcceleaGIS, Apps)

Attended/Presented at Accelea National & Regional User

Conferences; Regional Officer for Southwest Region (2012-

13); Founding Member of Accelea Asset Management User

Group; Frequent contributor to Accelea Community

Certified by Accelea in Scripting 3.0

Certified by Accelea as Implementation Professional (Bronze)

### TECHNICAL EXPERTISE

**Accelea Automation 7.3.3.7:** AA, AMO, ACA, AcceleaGIS, Inspector App, Code Officer App, Self-Hosting, Record Type Configuration; Workflow Design; Fee Schedule Implementation; ASI/ASIT Design; Form Portlet Design; Security; Calendaring / Inspection Scheduling; Conditions; Master/Custom Scripts; Batch Scripting; Third-Party Payment Interfaces; Accelea Document Service (ADS); Time Accounting

**Other CMMS / Work Order Systems:** Maximo 7.5, Cartegraph 8, ManagerPlus Pro

**Productivity Software:** Word, Excel, PowerPoint, Access, Publisher, Outlook, Visio

**Scripting / Languages:** JavaScript, VisualBasic.NET, Python, C#, SQL

**Database:** SQL Server and Oracle

**Reporting Applications:** SSRS 2008 R2, Crystal Reports 2008, Cognos 8

**GIS Software:** ArcGIS Desktop 10.2, ArcGIS Server 10.2, ArcGIS Extensions (Spatial, Network, 3D, Geostatistical), Geocortex Essentials 4

**GPS: Handhelds:** Trimble GeoExplorer 6000XH, Trimble Juno SB, Trimble Yuma / **Software:** Pathfinder Office, TerraSync, ArcPad

### PROFESSIONAL EXPERIENCE

Solutions Architect	Oct 2014
21Tech, San Francisco, CA	to Present
Senior IT Specialist / Accelea Administrator	Apr 2012
City of New Braunfels, TX	to Oct 2014
Advanced Metering Infrastructure Consultant	Dec 2010
City of San Marcos, TX	to Oct 2014
Digital Data Support Branch Supervisor	Dec 2011
Texas Department of Transportation, Austin	to Apr 2012
GIS Manager	Dec 2010
Yuma County, AZ	to Nov 2011
GIS / Technology Project Manager	Mar 2009
City of San Marcos, TX	to Dec 2010
GIS Specialist III	Jan 2002
Texas Commission on Environmental Quality, Austin	to Dec 2004

### EDUCATION

Ph.D., Geography
Oklahoma State University, 2014
M.A.G., Master of Applied Geography
Texas State University, 2001
B.M., Bachelor of Music
California State University, Fullerton, 2000

### CERTIFICATIONS

PMP, Project Management Professional
Project Management Institute / March 2014 / License 1697778
CSM, Certified ScrumMaster
Scrum Alliance / March 2015 / License 000418129
GISP, Certified GIS Professional
GIS Certification Institute / August 2010 / License 00063947
ArcGIS Desktop Associate
Esri Technical Certification / July 2011

**WELDON CRABB, Sr. Business Analyst**

<i>21Tech Team:</i>	Business Analysis	Config.	Scripting	Reporting	GIS	Technical Architecture	Data Migrations	Gov. Sector	Training
<b>Weldon Crabb</b>	✓	✓		✓				✓	✓

Weldon Crabb is a member of 21Tech. Mr. Crabb has over 25 years of extensive systems knowledge from a programming prospective and a variety of accumulated business experiences to bridge the interface gap between Business and System requirements, bringing system architectural integrity perspective to any business solution. Mr. Crabb has been engaged for the past 7 years with permitting and licensing systems in the public sector. He has led Fit/Gap assessments, documented baseline Configuration requirements, performed configurations, managed reporting requirements and acted as led Subject Matter Expert (SME) during UAT cycles.

Recent projects include:

- ◆ For a large western municipal department, acted as led Business Analyst and provided quality assurance services in support of the Accela licensing and permitting product suite. Conducted As-is/ To-be requirement assessments, advised, documented, and baselined configuration requirements for 45+ case types, and implemented configurations. Also led report development through entire lifecycle, identifying and cataloging scope, report specifications, Development SME, UAT and implementation coordination.
- ◆ For a large western municipal Building Inspection department, stepped in as Business Analyst to reconcile problem case types and provided quality assurance services in support of the Accela licensing and permitting product suite. Also acted as Report Development SME, UAT and implementation coordination, and report specification clean-up.
- ◆ For a large western municipal Planning and Building Inspection departments, acted as Business Analyst and provided quality assurance services in support of the Accela licensing and permitting product suite. Supported report development through entire lifecycle, identifying and cataloging scope, report specifications, development SME, UAT and implementation coordination.
- ◆ For a large municipal Planning department, performed as-is analysis of the Accela planning, enforcement, and inspection vendor solution, which included reviewing client requirements and assessing them against vendor capabilities.
- ◆ Prepared Planning and Budget report for major western municipality, with in-depth analysis on optimum lease/ refurbishment rates against Gartner statistics, and Gold standard best practices.
- ◆ From project inception, was a team member as Sr. Business Analyst to implement a DataMart and Business Intelligence GUI to support City Statistics and KPI's for several departments and every division of DPW for a major mid-western municipality. Detailed requirements for extracts, transformation, and load API's were delivered. Worked closely with developers for quality assurance and adherence to requirements.
- ◆ Consolidated 5 legacy in-house systems for the Human Resource department of a major western city into a DataMart for Business Intelligence reporting and statistics. Led discovery process to ensure existing systems could support meaningful data points for city oversight and managerial support.

**21Tech Response:**



# Weldon Crabb

# Sr. Business Analyst

## PROFESSIONAL SKILLS

### BUSINESS

Over 37 years of extensive systems knowledge from a programming prospective and a variety of accumulated business experience to bridge the interface gap between Business and System requirements. Bringing system architectural integrity perspective to any business solution. Requirements acquired through interviews, JAD, surveys and other appropriate methodologies. As author of system and business/system requirements have acted as lead throughout entire development life cycle as subject matter expert, engaged in development and implementation, use case creation and UAT support, attend to production implementation concerns, and act as front-end, back-end client liaison in realizing business goals through IT system solutions.

## SUMMARY

### Experience

- 15 Years Business Analysis
  - BI Analysis
  - Surveys
  - JAD
  - UAT
  - Asset Management
  - Site Observations
  - Data/GAP Analysis
  - Vendor Evaluations

### Accela Implementation Skills

- 5 Years AA Implementations:
  - As-is/To-be Requirements
  - Configuration Requirements
  - Configuration Build/Implementation
  - Expression Builder
  - Report Specifications
  - Report Configurations
  - Training/UAT Support
  - Vendor Evaluations

## TECHNICAL

**Requirements Software:** MS Office Suite, Microsoft Project, Word, Excel, VISIO, PowerPoint.

**Computer/Programming Background:** Accela Automation, Accela 360, XML, SQL, FCIF, CICS, MDI, Access Server gateway, Intertest, Dialogue Manager (ISPF), Expediter (CICS & ISPF). CEDF, SDF, BMS/GT, VSAM; Abendaid, Fileaid, TBEDIT, Eztrieve, DYL-280, DLTO, Datavantage, MVS Utilities; MVS/XA, JCL. TSO/ISPF, Panvalet, Endeavor.

**Languages:** XML, SQL, FCIF, Pacific Bell Interpreter, Programmable Validation Scripts, COBOL II, RPG II, DL/I, Script/GML, CLIST

**Hardware:** IBM Mainframes, IBM PC, Apple Macintosh, IBM Series/1, and IBM System/34 Minicomputers.

**Databases:** Oracle SQL, Sybase, DB2/QMF, IMS/DB.

## EXPERIENCE

2007, Sep - Present/21Tech/San Francisco, CA

### SR. BUSINESS ANALYST

- San Francisco – Accela Automation Implementation for Planning and Inspections departments
- City of Oakland – Accela Automation Reports
- Salt Lake City – Accela Automation, Permit Tracking
- Indianapolis – INDY Stat
- San Francisco – COIT Planning & Budget, TE Study, HRC BI, Proposals, Enterprise O365 rollout

2006, Apr-2007, Dec/ AT&T./San Ramon, CA

### BUSINESS ANALYST CONSULTANT

2006, Feb - 2006, April/CSAA/San Francisco, CA

**BUSINESS ANALYST CONSULTANT** 2006, Jan - 2006, Feb/21Tech-SF CRM/San Francisco, CA

### SYSTEMS ANALYST CONSULTANT

2003, July - 2005, May/SBC Internet Services/San Ramon, CA

### SYSTEMS ANALYST CONSULTANT

2001, Feb-2002, Nov/SBC Work Flow Mngr. /San Ramon, CA

### SYSTEMS ANALYST CONSULTANT

1998, Oct. - 2000, Oct./Telcordia/Piscataway, NJ

### SYSTEMS ANALYST CONSULTANT

### 21Tech Response:



## 2. ACCELA DEVELOPMENT

### ISSUES, ERRORS, AND CHANGES

This section is a recap of the requested development. Associated to each request is a brief description of the area of focus based on documentation provided to us as of this date, our understanding of the system, and the estimated effort for those areas. The low estimate provided should encompass all of the known requirements as of this date (i.e., the “Known Scope”), but should additional items be uncovered during discovery it may require more effort and would thus increase the scope; hence, a high hour’s estimate is provided to address this.

#	TASK NAME	REQUIREMENT	TYPE	RESPONSE	(HRS) LOW	(HRS) HIGH
1.	<b>Project Planning</b>	Develop a project plan that will include all of the departments that use Accela. This plan should include a schedule for improvements and departments involved in each.	Project Management	Time will need to be planned with San Leandro IT department to review the developed plan, to confirm there are no interferences in the schedule.	40	60
2.	<b>New Report Development</b>	Develop requirements, build, test and implement several reports requested by San Leandro departments. (Engineering, Building, Planning, and Environmental).	New Reports	<i>Work effort to develop new report includes business analysis, report specifications document with mock-up, development of Crystal report, load and configuration within Accela's Report Manager, unit testing, and user acceptance testing. Our numbers were based on the standard reports time which is estimated at 32 hours.</i>	220	280

#### 21Tech Response:



#	TASK NAME	REQUIREMENT	TYPE	RESPONSE	(HRS) LOW	(HRS) HIGH
3.	<b>Existing Report Modification</b>	Work with staff to identify the working reports that need to be modified and changed to meet the needs of the specific departments	Fix Reports	<i>Work effort to modify existing reports includes business analysis, mock-up, development of Crystal report, load and configuration within Accela's Report Manager, unit testing, and user acceptance testing. Our numbers were based on the average time to repair, modify and redeploy a report (8 hours).</i>	30	50
4.	<b>Credit Card Convince Fee</b>	Provide a method to add a 3% fee to the total fee if a customer wants to pay by credit card. This will need to be implemented in all departments that take payment across all record types and fee schedules.	Custom Development	<i>This task will involve a cross departmental effort that will affect fee schedules across the entire organization. We will need a SME from each department that is able to assist with specific requirements for the affected departments.</i>	97	127
5.	<b>GIS Integration</b>	Provide Assistance to San Leandro IT Department in the implementation of APO GIS Integration into their current environment.	Implementation	<i>This task will require San Leandro IT GIS Personnel to be involved and assist with task that require specific knowledge of the San Leandro GIS system.</i>	60	100
6.	<b>Additional Record Types</b>	Work with staff to design and implement the new record types as needed in the individual departments to further streamline their business processes.	Configuration	<i>Additional record types will need to be tested extensively by the Specific departments to insure it is working as expected prior to production deployment</i>	20	40

**21Tech Response:**





#	TASK NAME	REQUIREMENT	TYPE	RESPONSE	(HRS) LOW	(HRS) HIGH
7.	<b>Automation Scripting</b>	Develop and Implement scripted automation task to allow a more user friendly experience, confirm accurate data is being captured and save time for staff.	Configuration	<i>Additional scripting will need to be tested extensively by the Specific departments to insure it is working as expected prior to production deployment</i>	60	100
8.	<b>Workflow Modifications</b>	Modifications of workflows that	Configuration	<i>Workflow modifications needed can often impact other record types that duplicate work flow research will be needed to determine if all the modifications can be done to meet user needs</i>	40	60
9.	<b>User Training</b>	Additional user training will be required to show staff how to use the newly implemented Accela features.	Training	<i>Additional record types will need to be tested extensively by the Specific departments to insure it is working as expected prior to production deployment</i>	40	80

**21Tech Response:**



## ASSUMPTIONS

1. San Leandro's IT department will provide required and appropriate resources including subject matter experts (SMEs) to communicate business rules and requirements to support the proposed timeline.
2. 21Tech will document the requirements per the communication from SMEs and will deliver all documented requirements for approval or feedback. San Leandro's IT department will review the Requirements Document and within three (3) Business Days of receipt will deliver either:
  - a. Indicates that San Leandro's IT department has signed-off and accepted the Requirements Document; or
  - b. Identifies the areas of concern and provide the required feedback for requirements document update.
  - c. Requirements review will not take more than two review cycles.
3. San Leandro's IT department will provide required resources to support all tasks in the above timeline for environment setup, User Acceptance Testing and training.
4. All application development, test case creation, and testing will be based on signed-off requirements captured during requirements and Discovery and Analysis phase of the project.
5. Any changes after requirements sign-off will follow a change control process which will assess timeline, resource and cost impacts to the project.
6. All data clean up, business process re-engineering and User acceptance preparation and execution is San Leandro's IT department's responsibility.
7. All work such as (report deployment, server side changes, APO,Java heap changes, etc.) Will have to involve Accela CRC because San Leandro is a cloud hosted site. It is necessary to have a current support agreement with Accela to perform these changes.

### 3. COSTS

#### COST

At the time of this “Soft Addendum to RFQ” we don’t have examples of some items on the list or technical requirements for the completed project so this “Soft Addendum to RFQ” is being approached as a Time and Materials project for the purpose of estimating an approximate total level of effort for the Items shown. 21Tech has provided a discounted Time and Materials rate of (140.00 per Hr.) based on the volume of work to be provided. It is the full intent of 21Tech to provide an accurate estimate with the information supplied; but with limited access to samples and to the systems in question, our team has provided a Time and Materials range.

DESCRIPTION	HRS.	RATE	AMT
Total hours for listed Request Items – Low Estimate	607	\$140	\$84,980
Total hours for listed Request Items – High Estimate	897	\$140	\$125,580

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