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Staff Report for a City of San Leandro City Council Resolution to Approve a Master Services Agreement with Visionary Integration Professionals, LLC for Development and Improvements to the Accela Permitting System (in an amount not to exceed \$600,000)

SUMMARY AND RECOMMENDATIONS

Staff recommends that the City Council approve a resolution that makes a sole source finding under California Public Contract Code section 3400(c)(2), approves the contract, and authorizes the City Manager to negotiate and execute a Master Services Agreement (“MSA”) for the services needed to improve and enhance functionality on the City of San Leandro’s Accela permit system, based on the results of a needs assessment conducted in 2020. The total MSA amount cannot exceed \$600,000 and is structured to be implemented in individual Statements of Work (SOWs). The first SOW is included and is for the amount of \$63,820.00.

BACKGROUND

The Accela permit system is used by the Community Development, Engineering and Transportation, and Public Works Departments’ staff as well as Alameda County Fire Department staff to manage planning/zoning permits, building permitting and inspection services. The system is used to calculate and collect permit fees, track plan check comments and approvals, issue permits, maintain permit and inspection history and schedule inspections. The Accela system, a cloud computing application, was implemented in February 2015 to replace the Tidemark Advantage permit system, which was obsolete and no longer supported.

In 2020 staff used a competitive process to select a vendor to perform a needs assessment for the Accela system. Visionary Integration Professionals (VIP) was selected for the quality of its response, track record of success with the Accela system, and strong references. In turn, the MSA was developed as a means to implement the recommendations put forth in the 2020 needs assessment

report, which include structural changes and improvements to the Accela system, making more services available online, improvements to workflow assignments, and enhanced and redesigned reporting functions, among other improvements.

Analysis

In 2020 staff solicited competitive bids to identify a consultant for Accela services. Five firms responded, including: Visionary Integration Professionals, LLC, [s]Cube, Accela Professional Services, Gray Quarter, and Etech. Given its deep expertise in Accela and GIS software, track record of success, and strong references, Visionary Integration Professionals, LLC was selected.

Several areas of need were identified in the final needs assessment report, completed in September 2020. The following improvements and enhancements were identified:

- Setup new record types for all modules, including forms and data conversion
- Update records with new custom fields, workflows and scripts
- Configuring GIS access within Accela
- Update Scripts to new Accela standard
- Update and create new reports
- Configure Communication Manager for automated emails
- Configure ACA to allow for full online submissions of applications, particularly for building permits.

These improvements will lead to greater efficiencies in the way the City processes permits, thereby boosting staff productivity and increasing the volume of permits that can be handled, which has a direct impact on City revenue generated by the permitting process. In addition, these digital transformations will make the permitting process available online, increasing customer satisfaction. This will also have the effect of making the City's permitting processes available even in times of physical office closures, such as the shelter in place orders during the COVID-19 pandemic or future emergencies. As such, these improvements align with the City's overall disaster preparedness goals.

In order to best implement these improvements, staff developed a Master Services Agreement ("MSA"). The MSA is not a commitment for a specific project or piece of work. Instead, VIP and the City will jointly develop and agree to separate Statements of Work ("SOW"), which will be incorporated into the MSA, for each specific project related to this MSA. Each SOW will have a defined scope, deliverables, tasks, timeline, and budget. For each fully executed SOW, the City will issue a separate Purchase Order ("PO") for the agreed upon amount.

The maximum amount of the MSA is \$600,000 meaning that the combined amount of all SOWs executed under this MSA cannot exceed \$600,000. Staff developed the first SOW (SOW #1) and it is included with this Staff Report and Resolution. The total value for SOW #1 is \$63,820.00. Future SOWs will be funded through a mix of IT Fund Balance and General Fund sources, which can be appropriated through the budget adjustment process. In addition, Staff is evaluating the Technology Fee that is applied to City issued permits in relation to funding technology improvements, such as this.

Given this project will be an extension of the original competitively bid project, it is necessary for the City Council to make a sole source purchase justification to award the contract to Visionary

Integration Professionals, LLC (VIP), in accordance with California Public Contract Code section 3400(c)(2). This new agreement will build on work VIP already performed, and because it is a natural extension to a previously competitively awarded contract, a sole source finding is justified to match work done on a previously completed project.

Legal Analysis

- The City Attorney's office reviewed and approved the Master Services Agreement and Statement of Work #1.

Fiscal Impacts

The First Statement of Work (SOW #1) is in an amount not to exceed \$63,820.00. This amount will be funded by the 688 IT Fund Balance.

Budget Authority

- There are sufficient funds in the 688 IT Fund Balance to appropriate \$63,820.00 to the 2021-2022 IT operating budget, Account 688-13-121-5120. As noted above, the first SOW (SOW #1) totaling \$63,820.00 is included with this Staff Report and Resolution. Future SOWs will be funded through a mix of IT Fund Balance and General Fund sources, which can be appropriated through the budget adjustment process. In addition, Staff is evaluating the Technology Fee that is applied to City issued permits in relation to funding technology improvements such as this project.

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