



BOARD OF SUPERVISORS
AGENDA LETTER

Agenda Number:

Clerk of the Board of Supervisors
105 E. Anapamu Street, Suite 407
Santa Barbara, CA 93101
(805) 568-2240

Department Name: Planning & Development
Department No.: 053
For Agenda Of: January 22, 2008
Placement: Administrative
Estimated Tme:
Continued Item: Yes
If Yes, date from: January 8, 2008
Vote Required: Majority

TO: Board of Supervisors

FROM: Department John Baker, (805)568-2085
Director(s)
Contact Info: Steve Mason, (805)568-2070

SUBJECT: **Approval of Contract to Upgrade Existing Permit Tracking System (Accela)**

County Counsel Concurrence

As to form: Yes

Auditor-Controller Concurrence

As to form: Yes

Other Concurrence: Risk Management

As to form: Yes

Recommended Actions:

That the Board of Supervisors:

- a. Approve and authorize the Chair to execute a contract with Accela, Inc for the acquisition and implementation of a new Permit Tracking System in the amount of \$573,535.00 (\$18,995.00 license fees, and \$554,540.00 for implementation services);
- b. Authorize the Director of Planning and Development to approve change orders to the agreement that total less than \$65,000.00 for contingencies;
- c. Authorize and approve a Budget Revision request to obtain a General Fund Strategic Reserve interest-free loan previously recommended by the Debt Advisory Committee in the amount of \$573,535.00;
- d. Adopt the attached Resolution for Land Development Fees, extending the Technology Fee originally scheduled to sunset in 2008; and
- e. Pursuant to County's California Environmental Quality Act (CEQA) Guidelines, approve the Notice of Exemptions from the California Environmental Quality Act of 1970 (CEQA) exemption under the Public Resource Code, section 21080, subdivision (b) (8) (A) & (B) and Title 14 (California Code of Regulations), section 15273, for the fee resolution.

Summary Text:

The purpose of this request is to upgrade the existing Accela Enterprise Land Use and Permit Tracking Information System to the new Accela Automation E-Government System. The project is expected to take approximately twelve (12) months from contract execution to complete. Once implemented, the new functionalities provided by the upgraded system will improve the level of service provided to the public and increase accountability and management oversight of the entire permit review process. The County's Debt Advisory Committee recommended that the contract be funded via a loan from the Strategic Reserve (see attached Debt Advisory Committee meeting minutes). If approved by your Board, the extension of the current Technology Fee on building and planning permits will provide funding to repay the loan.

Background:

In 2000, Planning & Development (P&D) implemented the Accela Enterprise Land Use and Permit Tracking Information System (AE) to track its development and building permits. The AE System provided a good tool to track P&D's internal processes as they relate to the issuance of these permits. However, since its implementation, AE has not been upgraded, and is now considered outdated by current standards.

P&D has been evaluating options for a new system using current technology for the past year and a half. This proposed project is in the County's 2008-2013 Capital Improvement Program.

The land development permit process is a multi-million dollar function in the County, involving seven County departments and numerous outside agencies. Today there is not a system in the County that captures all of the activities involved in this permit function. The proposed new system is a comprehensive software suite capable of managing permitting activities as well as a wide variety of other municipal services. This proposal will establish a single system where all County departments involved in the land development permit process will track actions and issues with permit projects. Further, the system will provide better management opportunities for the County in this business function.

Accela Land Management System for Implementation

The Accela Land Management System has the ability to track and manage all land use and community development activities, including permit tracking, building inspections, and zoning and code enforcement. It allows staff access to input data, verify activity, check permit status, and obtain complete parcel information. The entire permitting process (from planning application submittal to occupancy) becomes more transparent to all stakeholders, while reducing errors and data redundancy.

Today, the proposed system sought to be implemented will provide various features that will improve the way the County conducts business. Features such as those listed below will enhance the County's organizational goals:

- Tracking and managing all permit types;
- Maintaining a database of vital parcel and permit information;
- Generating daily tasks for departmental reviewers and inspectors;
- Monitoring the expiration of permits;

- Checking zoning for special circumstances;
- Incorporating other County department workflows in the permitting process;
- Auto-routing information and tasks to other County departments;
- Assigning and signing-off of necessary tasks and conditions imposed;
- Enhancing the E-Government experience by providing a web-based interface to customers to conduct business on-line.

County's ACE Values

The Board has previously established three key organizational values to create a customer-service oriented culture throughout the entire County government organization. The new Accela Land Management System will foster a customer-service oriented approach to how P&D conducts its business once it is fully implemented. This is demonstrated by enhancing accountability, making the process more transparent, providing Internet convenience, as well as on-line payment capabilities.

Enhanced Accountability

Currently, management of work assignments is tracked via reports generated by the existing permit system. While these reports allow management to prioritize and assign projects to staff, there is no true ability to alert staff of any upcoming deadlines and/or any recently assigned projects or tasks, leaving a potential for deadlines to be missed, and newly assigned tasks to go un-worked for several days.

The new Accela Land Management System will mitigate these problems via automatic e-mail alerts to staff. With this new tool, staff will receive automatic e-mail alerts notifying them of new work assignments, upcoming tasks, and other pending deadlines that require immediate attention. Thus, staff will be held accountable for the management of their assigned workload given the additional tools available through this new System.

Furthermore, supervisory oversight will be reinforced with the System's ability to generate metrics on permit activity, missed/upcoming deadlines, and individual workload monitoring. As a result, managers and supervisors are better equipped to make work assignments based on individual staff assessments with the ability to generate these metrics on each staff member.

Customer-Focus Improvements

As part of the Accela Land Management System, the Department is also seeking to implement a web-based interface ("Citizen's Access") that will truly enhance the E-Government experience for the customers.

1. Transparency of Process – Currently, the permit review process for a single project may require review by as many as six other County departments (e.g. Public Works, Fire, EHS, etc) prior to permit issuance. However, since the other County departments track their workflows on separate databases, the process becomes difficult and frustrating for the project applicant. This project will seek to fold in the other County departments workflow processes into this System so that project applicants can clearly see all the necessary steps required in their project review. This allows the project applicants and/or their agents to track and manage their ongoing projects in a more transparent manner, thereby creating a more customer-friendly environment for the public to conduct business in the land use arena.

2. Internet Convenience – The Citizen’s Access module will also enhance the E-Government experience by allowing for online application submittals as well as easy access to historical and active information. This interface will allow the customers to create and complete an on-line permit application in the ease and convenience of doing business from their own home or office, thereby reducing trips to County offices. Once the application is completed, it may be submitted over the Internet, and the applicant need only forward the required plans to complete the application submittal process.

Furthermore, this interface will also allow customers to track their own projects over the Internet and determine the exact status of their project (e.g. whether the project is awaiting condition sign-off by another County department, or awaiting fee payments, etc). This can be invaluable in assisting applicants and agents to track their projects in the convenience of their own home or office. The automatic e-mail functionality available to staff to increase accountability will also be available to the public via the Citizen’s Access interface so that project applicants will be notified of any changes in status throughout the life of their projects.

3. On-line Payment Capabilities – The Citizen’s Access module also has the option for the County to accept on-line credit card payments for the convenience of those applicants who choose to do so. However, there are costs to the County associated with the acceptance of credit card payments.

The County Executive Office is currently conducting a study to determine the County’s needs in regards to the acceptance of credit cards for County services. Once the CEO’s office has decided on a recommendation to the Board, the department will revisit this issue at a later Board hearing to address this piece of the implementation.

Accela Potential Next Steps

Once the department has fully implemented the Accela Land Management System, its functionality can be extended with additional add-on products. Add-on products being considered by the department for future enhancements include:

- Accela Wireless – Accela Wireless is a mobile government application that extends processing capabilities to the field for inspections, investigations, code enforcement, work orders, and more. Accela Wireless keeps field inspectors in constant contact with the office, and can be advantageous during last minute inspection reschedules or cancellations.
- Accela GIS – Accela GIS provides staff with direct access to view geographic representations of all land-use, zoning and infrastructure information associated with each parcel, permit or inspection. Alerts can be created that trigger an end-user to process a permit based on a certain geographic criteria, thereby reducing the time staff spends researching the parcel history.

Increased Efficiency

As indicated above, the current permit review process for a single project may require as many as six other County departments in addition to P&D. While the current system provides a functional tool to track P&D’s own internal processes, this current System does not track the processes of the other County departments involved in reviewing the same project. Rather, each County department maintains their own separate databases to track the same project being reviewed elsewhere in the County. The

maintenance of these separate databases creates individual silos within the County organization and thus leaves out critical information for the project applicants as well as the P&D staff member charged with managing the project.

The new System sought to be implemented will fold in the other County departments into this single permit system so all project stakeholders are privy to the same information, leaving less room for omission of data, while also reducing the redundancy in entering the same data in multiple databases. This will increase the County's efficiency because progress by each department will be tracked on a single permit system, making the permit process not only more transparent to all stakeholders, but also providing consistent information regarding permit status and procedure to our customers.

Future Opportunities for Accela

As the leading provider of government enterprise software solutions, Accela has a variety of additional modules that can automate activities to truly manage the services for the entire County. If other County departments decide to expand their use of Accela to their other services, the foundation for inclusion of additional Accela modules will have been laid during this phase of implementation, making future expansion potentially easier.

Additional modules available through Accela Automation include:

- Accela Asset Management – The Accela Asset Management module has the ability to track and manage assets and resources. This module can provide benefit for departments tracking anything from facilities to the inventory of affordable housing units.
- Accela Public Health & Safety – The Accela Public Health & Safety module tracks and manages the permit and inspection activities that ensure community health standards are upheld and environmental health regulations are enforced. This could provide a huge benefit to the Public Health Department who conducts regular inspections in the food service industry.
- Accela Service Request – The Accela Service Request module can automate and manage interdepartmental or citizen service requests, complaints, or inquiries. This module can potentially provide a more effective way to strengthen the County's relations with its citizens.

Performance Measure:

In addition to the performance enhancements mentioned above, P&D also tracks numerous performance measures through the System. Other County departments will be able to use the System to manage their own performance measures as well.

Fiscal and Facilities Impacts: Any director-approved change orders totaling less than \$65,000 will be funded from previously collected Technology Fee revenue.

Budgeted: Yes

Fiscal Analysis:

Narrative:

The Technology Fee was originally approved by the Board in November of 2006 to support technology upgrades for the County's land development permit process. At the time the Board recognized that the use of disparate computer systems reduced effective communication between the County departments, and often led to time delays and inadequate information for permit applicants. Incorporating the other County departments onto a single permitting system will alleviate these issues and the extension of the technology fee will serve as a funding resource for the acquisition and maintenance of the System.

The County's Debt Advisory Committee reviewed the project and recommended that the project be funded with a General Fund Strategic Reserve loan of \$594,335. The department seeks to obtain a General Fund loan based on this recommendation for a total of \$573,535 (the total cost of the contract). Payment toward this loan will be made from revenue generated from the Technology Fees collected on building and planning permits, \$81,933.57 per year, over a seven (7) year period. The loan will be paid off in 7 years or sooner if Technology Fee revenues exceed projects.

Staffing Impacts:

None at this time.

Special Instructions: The Clerk of the Board ensures that noticing of the hearing for the proposed fee adjustment is completed in two general circulation publications 5 and 10 days prior to the hearing, in accordance with Government Code §66016. Planning and Development shall post Notice of Exemptions for each of the Resolutions in the County Planning and Development Department at least six days prior to consideration of the activity by the Board of Supervisors to comply with the County CEQA guidelines.

A copy of the Notice of Exemption for each of the Resolutions will be filed with the Clerk of the Board after project approval to begin the 35 day statute of limitations on legal challenges.

Please provide a signed copy of the Agreement to Linda Liu, Planning & Development. Thank you.

Attachments:

- A. System Upgrade Agreement between Santa Barbara County and Accela, Inc.
- B. CEQA Exemption
- C. DAC Meeting Minutes from Feb. 23, 2007
- D. Fee Resolution for Planning and Development
- E. Budget Revision Request

Authored by:

Linda Liu, Planning & Development

cc:

John Baker, Director, P&D
Dianne Black, Director, Development Services, P&D
Steve Mason, Deputy Director, P&D
Celeste Andersen, County Counsel
Sally Nagy, Chief Information Officer, CEO's Office