



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: General Services
Planning &
Development
Public Health
Department No.: 063/053/041
For Agenda Of: June 22
Placement: Administrative
Estimated Time:
Continued Item: No
If Yes, date from:
Vote Required: Majority

TO: Board of Supervisors

FROM: Department Director(s) Janette Pell, General Services (805) 560-1011

Lisa Plowman, Planning and Development (805) 568-2086

Van Do-Reynoso, MPH, PhD, Public Health (805) 681-5100

Contact Info: Mark Garcia (805) 568-2600

SUBJECT: Agreements with Accela, Inc for Accela Modernization and Migration Project

County Counsel Concurrence

As to form: Yes

Other Concurrence: Risk Management

As to form: Yes

Auditor-Controller Concurrence

As to form: Yes

Recommended Actions:

That the Board of Supervisors:

- A. Approve and authorize the Chair to execute a Professional Services Agreement with Accela, Inc (not a local vendor) for a contract amount not to exceed \$150,000.00 for software modernization and migration services for the Planning and Development Department (Attachment 1);

- B. Approve and authorize the Chair to execute a Professional Services Agreement with SEP Technology Consulting, LLC, (not a local vendor) for a contract amount not to exceed \$198,420.00 for software modernization and migration services for the Public Health Department (Attachment 2);
- C. Approve and authorize the Chair to execute an Addendum under the County's Master Services Agreement with Accela, Inc originally executed on 8/14/2018 for an order amount of \$536,948.00 for first year of subscription services for Planning and Development totaling 165 user licenses including user training (Attachment 3);
- D. Approve and authorize the Chair to execute an Addendum under the County's Master Services Agreement with Accela, Inc originally executed on 8/14/2018 for an order amount of \$143,221.55 for the first year of subscription services for Environmental Health totaling 50 user licenses, enhanced reporting, and user training (Attachment 4); and
- E. Find that the proposed Agreements are not a project under the California Environmental Quality Act (CEQA) pursuant to CEQA Guideline Sections 15378(b)(2) and 15378(b)(5) in that the Agreement involves a continuing administrative or maintenance activity, and the Agreement involves an organizational or administrative activity of government that will not result in the direct or indirect physical change in the environment.

Summary Text:

Accela is a software company that provides a cloud-based platform of government software solutions aimed at accelerating growth, efficiency, and transparency within governmental agencies. Its solutions allow citizens and businesses to request permits, licenses, and inspections via the web. The application also provides analytical dashboards for County executives to review work activity across multiple County departments in real time. Accela's Civic Platform provides opportunities to bring on additional County departments as needed, making this a truly enterprise solution that creates a consistency of experience for County constituents and staff.

The County currently has three different departments (Chief Executive Office – Cannabis Business Licensing, Public Health/Environmental Health Services, and Planning and Development) that use Accela software as part of their business needs. These different departments implemented their systems separately to address needs specific to their areas. Two of the departments, Planning and Development and Public Health/Environmental Health Services, separately maintain older versions of the Accela software onsite using hardware owned by each department. The Chief Executive Office – Cannabis Business Licensing uses a cloud subscription service hosted and maintained by Accela using their cloud-based platform. The three disparate versions make it difficult to share data across the departments and conduct accurate Countywide reporting. Countywide reports to the Board of Supervisors require manual aggregation and calculation by staff under this current model. Similar duplication of efforts is required of staff to handle requests from the public about Countywide permits and licenses. The existing Accela cloud-based platform used by the Chief Executive Office – Cannabis Business Licensing is an enterprise system that allows for much greater flexibility in data exchange and reporting. Migrating the Planning and Development and Environmental Health Services areas to this platform will allow the County to leverage their enterprise reporting and other capabilities with additional opportunities to add on other County departments such as County Fire and County Public Works.

Moving the County to a single instance of Accela increases operational efficiencies across the County by:

1. Reducing the burden on staff to maintain multiple hardware and software versions,
2. Increasing resiliency and uptime with a cloud-based service instead of a local hardware and software instance that needs to have downtime for maintenance and upgrades,
3. Increasing the ability to quickly and efficiently gather consistent data across departments, and
4. Enhancing Countywide data sharing, accuracy, and transparency for County executives and constituents who use our services.

This initial project will accomplish many of the KPMG recommended goals for Planning and Development and achieve many Countywide Renew '22 initiatives such as:

1. **Re-balance** – efficient use of staff and resources by eliminating multiple instances of the same software.
2. **Re-design** – Migrating multiple departments from their local hardware and software to online cloud-based services.

The timeline to migrate Planning and Development's software and data will take approximately 10-12 months to complete. The project will begin in July 2021 and complete on or before July of 2022.

The timeline to migrate Environmental Health Services software and data will take approximately 8-10 months to complete. The project will begin in July 2021 and complete on or before May of 2022.

Future planning includes:

1. Enhancing the Citizen Access portal for customer usability.
2. Evaluating potential for GIS integration.
3. Migrating other County departments such as County Fire and County Public Works.

Planning and Development worked with the Purchasing Manager to execute Purchase Order Contract number CN24557 for technical services with Gray Quarter for \$74,000 to enhance the Citizen Access portal for customer usability and enhancing configuration requirements to automate certain functions for more efficient use of the software for staff. Gray Quarter currently has a separate contract with the Chief Executive Office to configure their Accela instance for similar enhancements guiding the cannabis licensing division (Purchase Order CN24447 for a total of \$55,000). Per County Code 2-42 and Gov Code section 25502.5, the Purchasing Manager has delegated authority to enter into service agreements where the annual aggregate does not exceed \$200,000. The total aggregate for Gray Quarter totals \$129,000.

The County's General Services Information, Communications, and Technology Division, will provide oversight for departments who opt into this Countywide solution. General Services will ensure proper and consistent usage from a Countywide perspective, managing the overarching Master Services Agreement (Attachments 3,4,5), while each department will manage separate invoicing detailing their usage amount.

Background:

Planning and Development went through the County contracts process to purchase attain, and implement their version of Accela as a self-hosted model in January 2008 (BC16178). Public Health/Environmental Health Services went through the County Purchasing division to attain and implement a self-hosted

Envision software product (now owned by Accela) in July 2002. This Envision legacy product is actively being phased out and will be replaced by a newer generation Accela solution that will provide improved integration with a State environmental reporting system that Environmental Health Services must utilize. The Chief Executive Office-Cannabis Business Licensing Unit recently went through County Purchasing to attain and implement the cloud-based version of Accela in 2018. The Chief Executive Office's existing licensed version of Accela leverages cloud-based technology and Accela staff expertise to engage with their customers via the Citizen Access portal. Migrating the Planning and Development version of Accela onto the same platform as the Chief Executive Office accomplishes many KPMG recommended goals for the department as it relates to implementing a fully digital service delivery model, including an online application submittal process and the ability to process payments related to permitting through an online portal.

Planning and Development and Public Health/Environmental Health Services met with the Executive Information Technology Council (EITC) to obtain their concurrence to modernize their versions of Accela and move it onto the Chief Executive Office's existing version. This way, all three County departments can maintain their data within the same platform used by the Chief Executive Office - Cannabis Business Licensing Unit. During their meeting of February 10, 2021, the EITC authorized both Planning and Development and Environmental Health Services to migrate Accela onto the Chief Executive Office's cloud-based platform.

Approval of the Agreement for Professional Services Contract (Attachment 1) will allow Accela Professional Services to migrate Planning and Development's data onto the same cloud-based model used by the Chief Executive Office so that departments can share data using the same platform resulting in efficient reporting and communication to County executives and constituents alike, especially concerning Cannabis related activities. Approval of the Agreement for Professional Services Contract (Attachment 2) will allow SEP Technology Consulting, LLC to migrate Environmental Health's data onto the same cloud-based instance listed above. The increase in operational efficiency will facilitate communication across County departments that currently have a stake in the permit review process. Additionally, the enhanced Citizen Access portal will enable permit seekers to submit their applications online and communicate virtually with Planning and Development and Environmental Health Services staff.

Migrating Planning and Development and Environmental Health Services to the same platform as the Chief Executive Office - Business Cannabis Licensing creates an opportunity for the County to leverage an Enterprise-wide solution that will create more transparency for County executives and constituents alike. Other County departments such as Public Works and County Fire have already indicated an interest in joining this enterprise platform in order to leverage similar benefits. Potential future solutions for the County to leverage the Accela platform may include Fire and Public Safety, Service Request Management, or Short Term Rentals, and other Business licensing.

Performance Measure:

1. Migration will be completed within 12 months of contract execution; and
2. Migrated system will maintain 99% uptime.

Fiscal and Facilities Impacts:

Budgeted: Funds are available and will be allocated to the appropriate departments via a Budget Revision in FY 2021-22

Fiscal Analysis:

Dept	Funding Source	Description	FY 2021-22	Annualized Ongoing Cost	Total One-time Contract Cost*
P&D	EITC - Technology Fund	Migration - Accela	\$ 150,000	\$ -	\$ 150,000
P&D	EITC - Technology Fund	Portal Enhancements - Gray Quarter	\$ 74,000		\$ 74,000
PH-EH	EITC - Technology Fund	Migration - SEP	\$ 198,420	\$ -	\$ 198,420
Total - Modernization & Migration (EITC Technology Fund)			\$ 422,420	\$ -	\$ 422,420
P&D	P&D Permit Revenue	165 Licenses & Training - Accela	\$ 536,948	\$ 536,948	\$ -
PH-EH	Public Health - Env. Svcs Permit Revenue	50 Licenses & Training - Accela	\$ 143,222	\$ 143,222	\$ -
Total - Licensing & Training (Permit Revenue)			\$ 680,170	\$ 680,170	\$ -
Total - Accela Modernization & Migration Project (Phase I)			\$ 1,102,590	\$ 680,170	\$ 422,420

Narrative:

The Executive Information Technology Council approved the one-time project migration cost during their meeting on February 10, 2021, and funding will be provided by the County’s Technology Investment Fund as part of an Enterprise-wide product for the County as a whole. The funds for annualized on-going costs for licensing costs will be funded by permit revenue by each department. With approval of these actions, available funding will be set aside to provide appropriation. A budget revision request will be brought back to the Board to appropriate these funds to the respective departments.

Key Contract Risks:

A risk analysis was performed on the proposed contract and was determined to be of moderate risk. This conclusion is due to the total contract amount and is considered a sole-sourced contract. The SEP Technology Consulting, LLC migration contract also incorporates a not-to-exceed contract limitation on audit exception reimbursements if needed due to the one-time, limited scope of the contract.

However, the County has an existing relationship with Accela, Inc through the CEO’s office and leveraging Accela’s technical expertise to migrate existing data onto the new platform will ensure a seamless transition. Furthermore, the Contractors and the departments have agreed to User Acceptance Training and resolution of any issues within a reasonable amount of time. This will be managed by project managers on both the County and Contractor’s behalf as to ensure successful integration of systems.

Staffing Impacts:

Legal Positions:

0

FTEs:

0

Special Instructions:

1. Please provide signed copies of the Professional Services Agreement (Attachment 1) and the Addendum to Existing MSA (Attachment 3) to Linda Liu, Planning and Development.
2. Please provide a signed copy of the Professional Services Agreement (Attachment 2) and the Addendum to Existing MSA (Attachment 4) to Kelly Lazarus, Public Health Department.

Attachments:

1. Professional Services Agreement with Accela Inc for Planning and Development.
2. Professional Services Agreement with SEP Technology Consulting, LLC for Environmental Health
3. Addendum to Existing MSA between Planning and Development and Accela, Inc.
4. Addendum to Existing MSA between Environmental Health Services and Accela, Inc.
5. Existing Master Services Agreement (MSA) between County and Accela, Inc. signed 08/14/2018

Authored by:

Mark Garcia, Project Portfolio Manager, General Services

CC:

Steve Mason, Assistant Director, Planning and Development
Linda Liu, Planning Process Analyst, Planning and Development
Lars Seifert, Director, Environmental Health Services
Scott McGolpin, Director, Public Works
Julie Hagen, Deputy Director Finance and Administration, Public Works
Larry Lowman, IT Manager, Public Works
Susan McKenzie, Deputy County Counsel
Mark Hartwig, Fire Chief, Santa Barbara County Fire Department
Mark Garcia, Project Portfolio Manager, General Services