



CONSENT CALENDAR

Agenda Item # 4

AGENDA REPORT SUMMARY

Meeting Date: May 23, 2017

Subject: New Electronic Permit Tracking System

Prepared by: Zachary Dahl, Planning Services Manager – Current Planning

Reviewed by: Jon Biggs, Community Development Director

Approved by: Chris Jordan, City Manager

Attachments:

1. Superior Proposal Executive Summary

Initiated by:

City Council: CIP Project CD-01008

Previous Council Consideration:

May 12, 2015 – Adoption of the City’s Information Technology Roadmap

Fiscal Impact:

\$430,149 – Funded by the IT Initiatives Project (CD-01008) in the Capital Improvement Program.

Environmental Review:

Not applicable

Policy Questions for Council Consideration:

None

Summary:

- The current electronic permit tracking system used by the Community Development Department is outdated, does not provide online service capabilities and is no longer supported by the vendor.
- Community Development, Public Works, Finance and Code Enforcement all use different software to manage projects, track applications and issue permits.
- The new electronic permit tracking system will provide a uniform electronic permitting system for all four departments, will significantly expand the City’s online services, and will provide staff with additional tools to manage workflow and improve the processing of applications and issuance of permits.

Staff Recommendation:

Move to authorize the City Manager to execute an agreement on behalf of the City with Superior in an amount not to exceed \$430,149 for the development and implementation of a new electronic permit tracking system per IT Initiatives Project CD-01008.



Subject: New Electronic Permit Tracking System

Purpose

Improve the technology used by Community Development, Public Works, Finance and IT, implement a uniform electronic permitting system for all four departments, provide staff with additional tools to increase efficiency and improve the processing of applications and issuance of permits, and enhance customer service.

Background

In 2015, the City engaged the professional services of NexLevel Information Technology to perform an evaluation of the Information Technology (IT) Division and the technology utilized by the City. One of the findings was that many of the business application systems supporting the City are dated and need to be upgraded or replaced. Based on the findings of the evaluation, an IT strategic roadmap was developed to prioritize the technology needs of the City. This included a focus on enabling improvements in the City's information technology infrastructure and initiating activities for the acquisition of new, core business technology software. The IT Roadmap was reviewed and accepted by the City Council on May 12, 2015.

As part of the Roadmap, a list of departmental projects and needs was provided for future City planning efforts. This future projects list included replacement of the permit/planning software and establishment of a code enforcement application for Community Development; a new cashiering system was recommended for Finance; and establishment of a permit management and tracking application was recommended for Public Works.

To support the implementation of the IT Roadmap, an IT Initiatives Capital Improvement Project (CIP) was established and an amount of \$1.5 million was allocated from the Technology Fund in the FY 2015-17 Budget. At the mid-year budget review in 2016, an additional \$1 million was added to the IT Initiatives CIP, bringing the total budget to implement the IT Roadmap to \$2.5 million.

The City is currently using multiple different software platforms, or none at all, for land use and zoning management, permitting, code enforcement, inspections, and business licensing. Community Development uses GovPartner Connect (owned by Cartegraph) for management and tracking of all permitting, inspections and workflow activities, the Finance uses QuickServe Suite (developed by Progressive Solutions Inc.) to manage and track business licenses, and Public Works uses spreadsheets and paper records to manage their permits, inspections and fees.

Discussion/Analysis

Starting at the beginning of 2016, a team of staff from IT, Community Development, Public Works and Finance began researching and evaluating options for acquisition and implementation of a new electronic permit tracking system. This included communication with other jurisdictions around the Bay Area, demonstrations from software vendors and site visits to two nearby jurisdictions to see their permit tracking software in use. Once staff completed its research and due diligence, a request for



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proposals (RFP) for a new electronic permit tracking system was advertised in February 2017. The City received four proposals in response to the RFP. Following a detailed review and analysis by staff, Superior, with its TRAKiT electronic permit tracking system, was identified as the most qualified firm based on their software's technical capability, local experience and professional references. An executive summary of the TRAKiT electronic permit tracking system proposal is included in Attachment 1.

The TRAKiT system will provide a modern, centralized permitting system for the City that will significantly expand online services, provide staff with additional tools to manage their workflow and improve the City's processing and review of applications and issuance of permits. For Community Development, the system will provide Planning, Building and Public Works staff with comprehensive workflow management tools, integrated permit tracking from initial submittal through permit final, integration with the City's recently updated GIS mapping system, ability to use mobile devices during inspections in the field, and significantly expanded online services available to the public (online payment, online submittal, online application tracking, etc.). For Finance, the system will provide an updated business licensing system that improves staff efficiency, expands online services available to the public and integrates permit and business license tracking with other City departments. The system will also include a code enforcement module that improves case tracking, public accessibility and integration with other departments.

In addition to the technical capabilities of the TRAKiT electronic permit tracking system, Superior has a very strong local presence, with over 40 jurisdictions in the greater Bay Area currently using TRAKiT. This includes 14 nearby communities in Santa Clara and San Mateo Counties – Belmont, Burlingame, East Palo Alto, Foster City, Hillsborough, Los Altos Hills, Millbrae, Milpitas, Morgan Hill, Redwood City, San Bruno, San Carlos, Saratoga and South San Francisco. Staff contacted a number of these jurisdictions to discuss their experience with the TRAKiT system and all had positive comments and feedback.

If authorized to proceed with Superior, staff anticipates a 12-14 month timeframe to develop and implement TRAKiT. To prepare for updates to the City's core business technology software systems, IT recently upgraded the City's main server system to a Nutanix hyperconverged multi-node. Therefore, the City's IT infrastructure is currently capable of handling this updated permit tracking software. Only additional memory modules, or at most - a new node, will be needed to support this new software.

Options

- 1) Authorize the City Manager to execute an agreement with Superior to develop and implement a new electronic permit tracking system for the City



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Advantages: The City will be able to implement a modern, uniform electronic permitting system that significantly expands the City's online services and provides staff with additional tools to manage workflow and improve the processing of applications and the issuance of permits.

Disadvantages: None identified.

- 2) Do not authorize the City Manager to execute an agreement with Superion to develop and implement a new electronic permit tracking system for the City

Advantages: None identified.

Disadvantages: The City will continue to use outdated permit tracking software, will not be able to expand online services to meet citizen needs and will not be able to improve interdepartmental efficiency by implementing one software system for Community Development, Finance, Public Works and Code Enforcement.

Recommendation

The staff recommends Option 1.



March 14, 2017

Mr. Andrew Tseng, IT Manager
Los Altos City Hall
One North San Antonio Road
Los Altos, CA 94022

RE: Request for Proposal (RFP) for Professional Services for a New Electronic Permit Tracking System

Dear Mr. Tseng:

On behalf of Superion, thank you for the opportunity to submit our proposal in response to the City of Los Altos' (City) RFP as referenced above. Superion is prepared to provide the City with a comprehensive permit tracking and streamlining solution that will enhance the City's customer service; increase transparency of the City processes; ensure data accountability; reduce permit processing time; decrease unnecessary staff workload; provide consolidated reporting and permit tracking across departments and divisions; and prevent compromised data security. We feel that Superion is the City's best choice based on the following qualifications and experience.

Well-Designed, Proven Software. In June of 2015, Superion acquired the former CRW Systems and TRAKiT applications. Superion is a leader in information technology solutions that impact more than 175 million residents in North America. Together, our experience and the corporate strength of Superion fuels continued development and combined experience to help communities, like Los Altos, better serve your citizens. Regionally located in Southern California, the TRAKiT Division has 25 years of experience in providing permitting system solutions for community development, public works, finance/business license, and police/code enforcement divisions. Our proposed solution is in use at more than 200 city, county, and state agencies across the United States, and over 40 agencies in the Greater Bay Area.

TRAKiT provides a modern, centralized system that fosters collaboration between departments, vastly improves workflow efficiency, and ensures the integrity of information in your database. Designed with a user-friendly interface, TRAKiT is easy to learn and quick to adapt to for end users and administrators. TRAKiT is scalable and can grow with the City, as it easily configures to meet your current and future business requirements.

TRAKiT applications have a very strong client base in California with more than 90 agencies statewide.

We offer a complete solution, including software, documentation, onsite implementation, and training. *Our team has a long-standing proven record of implementations completed on time and within budget.* We dedicate ourselves to developing true business relationships with our clients and invite you to contact them.

Last Purchase Ever. We propose a solution that does not require complicated costly version updates, and we are committed to bringing the latest technology and software support as necessary. This ideal helps to increase your bottom dollar year after year, being the last solution you ever need.

This proposal demonstrates our clear understanding of your requirements and we welcome the opportunity to present the many advantages of TRAKiT. This proposal and prices quoted herein are valid for 180 days from the proposal due date.

Sincerely,

Denise Brousseau

Denise Brousseau
Account Executive – TRAKiT Division
Phone: 858-451-3030 extension 28290
Mobile: 310-776-1393
Fax: 760-438-2060

Section 1. Executive Summary

The City of Los Altos seeks a best-of-breed solution for professional services for a new electronic permit tracking system. The proposed TRAKiT™ software suite meets those needs and exceeds your expectations. Superior uses the latest technologies to offer a flexible solution that is easily modified as your business processes evolve. This proposal demonstrates our ability to ensure your goals are met with one feature-rich, streamlined, and innovative system.

CRW Systems (CRW), a leading developer of community development solutions, developed and refined TRAKiT over the past 25 years. In June 2015, Superior acquired CRW, combining two companies with proven track records of ingenuity and success within the local government software market.

"We have found that the TRAKiT system has dramatically increased communication between our divisions, and has also dramatically increased the accuracy of the data we all share."

- **Building Official**
California City

What do we offer?

Flexibility – TRAKiT is an easy-to-configure, and even easier to understand, .NET application. Our proven implementation and training services address current and future organizational changes.

Citizen Access – eTRAKiT enables citizen access via the web. Contractors and applicants can obtain current permit, project, case, and licensing information. Inspection requests, permit applications, license registration, plan submittals, fee collections, and complaints are submitted online.

Easy User Experience – Standard Microsoft functions let users quickly navigate the system. Routing from one module to another is easy because TRAKiT has a similar look and feel system-wide.

Accuracy – TRAKiT's single, integrated database is configured to fit your business rules and workflow procedures. Limited data entry and selection options from pre-determined tables greatly reduce the amount of manual entry required.

Integration – One of TRAKiT's most significant advantages is exchanging information across existing investments. Standard features include working with your Esri GIS system, importing data from the County Assessor, and merging working data directly into other Microsoft applications, such as Word, Excel, and Outlook. Other interfaces are available for finance systems and document management programs.

Reporting – TRAKiT has a built-in ad hoc reporting tool; the system includes many sample reports and allows users to swiftly create simple to complex reports on-the-fly.

Mobility – In-the-field use of TRAKiT on a variety of mobile devices allows inspectors the same full features found in the office. With real-time access, your inspectors can do more work in the field.

WorkSpace – TRAKiT users can track assigned tasks through their own unique user-defined WorkSpace, which includes an agency-wide bulletin section, RSS feeds, individual task list, customized dashboard, and various centers (inspection, plan review, etc.). By selecting a related link, users are automatically routed to the specific task they wish to work on.

Limited Information Technology (IT) Effort – TRAKiT requires very limited City IT resources and no programming skills to operate or change workflows. Most customers rely on our excellent support to assist them with questions.



Satisfied Clients – We strive for long-standing business partnerships with our clients; more than 200 TRAKiT customers can attest to this commitment. TRAKiT is an application designed by our clients, with tools and support from Superion, to meet their growing and changing needs.

Quick Execution – Our comprehensive, efficient implementation methodology moves your staff into successful production in the least amount of time possible, while allowing for flexibility.

Why choose us?

Proven Experience – Superion is committed to providing solutions with meaningful benefits to our customers—up to, during, and well beyond signing a contract. As a result, client retention for the TRAKiT solution has been 99.9% since 1999. More agencies realize the benefits of TRAKiT each year.

Stability – Superion's resources, reputation, and expertise in the public sector create benefits and opportunities for our valued TRAKiT customers. More than 1,600 customers across North America use TRAKiT and other Superion solutions. Superion understands and responds to the needs of local government with agility and innovation.

Leading-edge Technology – TRAKiT is at the forefront of next generation web standards not adopted by any other industry solution, including support for SQL 2012, or later, databases and Microsoft Outlook email functionality. TRAKiT users have the flexibility to operate on various platforms without requiring a plug-in. All users automatically receive updates when they log in to TRAKiT, saving the City time required to add updates to every machine individually.

Outstanding Support – Ongoing technical support services include downloadable updates, version control, eTraining videos, phone assistance, eHelp documentation, and live remote access to walk through problems. Through our Superion Users Group Association (SUGA), we host a large national event and several smaller regional events each year to help customers access in-person training and collaboration with fellow customers and Superion staff.

Efficiency – A single screen interface allows users rapid access to all system modules and interfaces. TRAKiT's extensive and user-friendly features reduce duplication of work and increase efficiencies of administrative and operational processes.

Personal Attention – We are dedicated to our customers and work with each agency individually to automate the way you conduct business. Our comprehensive solution provides installation, training, data migration, project management, business process consulting, customization, and extensive technical support. We ensure your City's investment provides your citizens with the highest quality and most efficient customer service possible.

Last Purchase Ever – Our proposed solution does not require complicated costly version updates and gives you the very latest technology and software support. TRAKiT will improve your City's efficiency, accountability, and bottom line year after year.



Which modules?

Following is a list of proposed and optional modules, as well as the functionality of each, available within the TRAKiT solution. Further detail on each module is provided in Section 6 of this proposal.

TRAKiT LAND MANAGEMENT SYSTEM

GeoTRAK	Property data management
PermitTRAK	Permits and inspections
ProjectTRAK	Planning and related activities
CodeTRAK	Code enforcement and compliance
AEC TRAK	Information associated with professionals including architects, engineers, contractors, and surveyors
CRM TRAK	Citizen response management
WorkSpace	User-defined dashboard
Reports	Comprehensive set of standard reports

TRAKiT ADD-ON APPLICATIONS

GIS	Spatial and Geo data integration
LicenseTRAK	Business and other licensing
eTRAKiT	Online customer access
iTRAKiT	Inspector mobile access via iPad
MobilePDA	Inspector mobile smartphone and tablet access
VoiceTRAKiT	Interactive voice response
MyCommunity	City Hall mobile app via iPhone, iPad, and Android phones

Summary

Our comprehensive offering demonstrates our ability to meet and exceed your requirements. We have extensive knowledge garnered through many years of providing software solutions to city, county, and state agencies. The depth of our experience and quality of our people is a key factor in our success. We look forward to presenting TRAKiT to the City, and to partner with you to make your goals a reality.

Greater San Francisco Bay Area Client List

Our domain knowledge of California is the strongest in the business, with 220 TRAKiT customers and more than 90 in California.

American Canyon, CA	Novato, CA
Antioch, CA	Piedmont, CA
Belmont, CA	Pinole, CA
Brentwood, CA	Redwood City, CA
Burlingame, CA	Richmond, CA
East Palo Alto, CA	Rohnert Park, CA
El Cerrito, CA	Salinas, CA
Emeryville, CA	San Anselmo, CA
Fairfield, CA	San Bruno, CA
Foster City, CA	San Carlos, CA
Hillsborough, CA	San Pablo, CA
Los Altos Hills, CA	San Rafael, CA
Merced County, CA	Santa Cruz, CA
Mill Valley, CA	Saratoga, CA
Millbrae, CA	Sausalito, CA
Milpitas, CA	South San Francisco, CA
Morgan Hill, CA	St. Helena, CA
Napa Sanitation District, Napa, CA	Tiburon, CA
Napa, CA	Tracy, CA
Newark, CA	Vacaville, CA
Monterey Bay Unified Air Pollution Control District, CA	Vallejo, CA