



Board Report

File #: A 23-410, **Version:** 1

- a. Approve Amendment No. 4 to Professional Services Agreement No. A-14427 with Accela, Inc., to continue to provide implementation, hosting and maintenance for the subscription services for the Accela software product (“services”) for permit tracking, to increase the not to exceed amount of \$2,127,745 by \$250,000 for a new total amount not to exceed \$2,377,745, and to amend the scope of work with no extension to the term of July 1, 2019, to June 30, 2025;
- b. Authorize the Contracts/Purchasing Officer or designee to execute Amendment No. 4 to Professional Services Agreement No. A-14427 and future amendments to the Agreement where each amendment does not significantly alter the scope of work or increase the approved Agreement amount by more than 10% (\$237,775), subject to review and approval as to form by the Office of the County Counsel and as to fiscal provisions by the Auditor-Controller’s Office; and
- c. Authorize the Auditor-Controller to amend the Fiscal Year 2023-24 Adopted budget to increase appropriations by \$167,000 funded by an increase in revenue in Fund 001, Appropriation Unit HCD002, Unit 8543. (4/5ths vote required)

RECOMMENDATION:

It is recommended that the Board of Supervisors:

- a. Approve Amendment No. 4 to Professional Services Agreement No. A-14427 with Accela, Inc., to continue to provide implementation, hosting and maintenance for the subscription services for the Accela software product (“services”) for permit tracking, to increase the not to exceed amount of \$2,127,745 by \$250,000 for a new total amount not to exceed \$2,377,745 and to amend the scope of work with no extension to the term from July 1, 2019, to June 30, 2025;
- b. Authorize the Contracts/Purchasing Officer or designee to execute Amendment No. 4 to Professional Services Agreement No. A-14427 and future amendments to the Agreement where each amendment does not significantly alter the scope of work or increase the approved Agreement amount by more than 10% (\$237,775), subject to review and approval as to form by the Office of the County Counsel and as to fiscal provisions by the Auditor-Controller’s Office; and
- c. Authorize the Auditor-Controller to amend the Fiscal Year 2023-24 Adopted budget to increase appropriations by \$167,000 funded by an increase in revenue in Fund 001, Appropriation Unit HCD002, Unit 8543. (4/5ths vote required)

SUMMARY/DISCUSSION:

In 2008 the Housing and Community Development (HCD) department migrated its permitting system from Permits Plus to Accela Civic Platform. Since that time HCD has had a staff person or an Information Technology Department (ITD) staff person performing the routine daily administration of the Accela system. System administration includes managing internal and external user accounts, adding and/or modifying user and user group permissions, updating fee schedules and valuation tables, building reports, troubleshooting when errors occur, working with Accela support when issues require escalation, among many other tasks.

Over the past 15 years HCD has expanded the use of the Accela product from simply tracking planning and building permits, to having internal staff and external review departments completing permit applications and plan reviews electronically within our designed workflows, having automated notifications sent to applicants when permits are approved or inspections have been scheduled, implementing the Accela Citizen Access

(ACA) portal for members of the public to apply for permits online and access permit information directly, just to name a few improvements. As of the date of this report, HCD has 124 internal users, 49 users from other County departments and agencies (Ag Commissioner, Fire Districts, Environmental Health, Public Works, Facilities and Parks, Cannabis Program) and 9,328 public users.

Numerous codes and scripts run in the system background creating the automated operations with currently over 300 such codes and scripts running at any given time. Reading and understanding these codes to ensure they function properly, both individually and in coordination with other scripts and workflows, now requires a higher level of expertise than HCD staff is able to provide.

HCD requested and received from Accela, Inc., a diagnostic assessment of HCD's implementation of Accela Civic Platform and Accela Citizen Access to better understand what was needed to improve our permitting system. HCD received the results of the assessment in May of this year with 38 recommended focus areas for improvement and repair. Through this assessment and our experience operating the system, it has become clear that some functions of the system have become overly complex while other functions need to be built out further for optimization, namely, implementation of the vacation rental module and the PowerBI integration, as well as upgrades to the ACA portal.

Managed Application Services (MAS) is a service package offered by Accela to their customers to help fill the gap in technical knowledge and expertise that many jurisdictions are experiencing. Adding MAS to our existing agreement will allow HCD to have a team of experts for a twelve (12) month period to work on all tasks identified in the diagnostic to ensure our system is working at an optimal level. This in turn will create a more streamlined and efficient permitting system for our staff and citizens.

HCD recognizes that additional resources are needed to address these needs; therefore, HCD is seeking to amend the existing Agreement with Accela to increase the agreement amount by \$250,000 to include MAS in the scope of work.

Attachment A, provided for reference, includes proposed Amendment No. 4 to PSA No. A-14427 and the amended scope of work.

OTHER AGENCY INVOLVEMENT:

The Office of the County Counsel, County Administrative Office, Budget Analyst and the Auditor-Controller's Office have reviewed and approved of Amendment No. 4 as to form and legality, and fiscal provisions, respectively. The Budget Committee received this report (BC 23-084) and supported this action at their meeting on July 26, 2023.

FINANCING:

HCD strives for 100% cost recovery through permit fees for all costs associated with the permitting process. Technology costs are recovered through the Technology Fee. Adding the additional cost for Accela MAS will increase the Technology Fee by 0.45%, from 7.04% to 7.49% per permit processed. The increase of the Technology fee and other fee amendments was considered by the Board of Supervisors on August 22, 2023. (RES 23-145) When the work is completed, staff will return to the Board for consideration of reducing the technology fee back to 7.04%, or an amount appropriate based on technology costs at that time

HCD is requesting the Board of Supervisors to approve Amendment 4 and authorize an increase of \$167,000 in appropriations and revenue in the adopted FY2023-24 Fund 001, Appropriation Unit HCD002, Unit 8543, to finance the increased cost of Amendment No. 4, with the remaining \$83,000 included in the FY2024-25 budget.

BOARD OF SUPERVISORS STRATEGIC INITIATIVES:

The recommended action supports the Board of Supervisors' Strategic Initiatives for Administration. The proposed Amendment will provide a higher level of technical support to update and optimize the Housing and Community Development permitting software.

- Economic Development
- Administration
- Health and Human Services
- Infrastructure
- Public Safety

Prepared by: Karen Riley-Olms, Management Analyst II, (831) 755-5132

Reviewed by: Elizabeth Gonzales, Permit Center Manager

Reviewed by: Lori Woodle, Finance Manager I

Approved by: Craig Spencer, Interim Director

The following attachments are on file with the Clerk of the Board:

Attachment A - Amendment No. 4

Attachment B - Amendment No. 3

Attachment C - Amendment No. 2

Attachment D - Amendment No. 1

Attachment E - Non-Standard Agreement