



Folsom City Council Staff Report

MEETING DATE:	8/24/2021
AGENDA SECTION:	Consent Calendar
SUBJECT:	Resolution No. 10686 – A Resolution Authorizing the City Manager to Execute Amendment No. 5 to the Agreement (Contract No. 174-21 13-052) with Superior, LLC (now known as CentralSquare Technologies) to Increase the Number of User Licenses, Migrate Additional Project Data to the New Permitting System, and Develop a Custom Land Management Integration
FROM:	Community Development Department

RECOMMENDATION / CITY COUNCIL ACTION

Staff respectfully requests that the City Council approve Resolution No. 10686 – A Resolution Authorizing the City Manager to Execute Amendment No. 5 to the Agreement (Contract No. 174-21 13-052) with Superior, LLC (now known as CentralSquare Technologies) to Increase the Number of User Licenses, Migrate Additional Project Data to the New Permitting System, and Develop a Custom Land Management Integration.

BACKGROUND / ISSUE

This amendment to the City's existing contract with Superior LLC is critical to the successful configuration and launch of the City's new online development processing and permitting system called Community Development or ComDev (formerly called TRAKiT). The cost of the amendment, including the recommended contingency, is \$32,830 and all costs will be covered by State grants. Amendment #5 includes three important items. It will:

1. Increase the number of user licenses;
2. Provide for the migration of all historical permit and project data; and
3. Create an automated process that will ensure the HTE NaviLine land management system is updated with all parcel and address changes.

Under the current agreement, there were only 25 available user licenses. With this amendment, the number of user licenses will increase to 75, which will enable all City department staff

involved in the development review process (e.g., Public Works, EWR, Parks, Fire, etc.) to use the new ComDev software system. Second, this amendment will allow the City to move all historical permit and project records from its current system into the new system. Under the original agreement only active permit records would be moved into the new system. This will ensure that all permit and project records are in one place, which will allow staff and customers to easily look up those records. Finally, the consultant will develop a new GIS synchronization script, which will ensure that any new changes to City address and parcel records are kept up to date in the City's NaviLine land management system. Though CDD will no longer be using NaviLine for development projects and permits, the program is still used by the City's Environmental and Water Resources (EWR) Department and the Finance Department customer water meter billing. As a result, both the NaviLine and the ComDev land management system need to have the same address and parcel data.

The total cost of these amendments is \$27,830 as shown below in Table 1. In addition, staff is also requesting a \$5,000 contingency to be used in the event that any critical additional services are needed prior to the launch of the new system. Under current City rules, any monetary increase to this agreement requires City Council approval. By approving a contingency not to exceed \$5,000, this will ensure there are no delays to the launch of the new system if minor additions are required.

**Table 1
Description of Additional Services**

Services	Description	Fee
1) TRAKiT9 Community Development Suite User License – License Fee	50 Additional licenses for Community Development Suite at a unit cost of \$349.90 per license.	\$17,495.00
2a) Public Administration Data Conversion Services – Fixed Fee	Cost of migrating HTE NaviLine Planning & Engineering project data into Community Development.	\$4,680.00
2b) Public Administration Project Management Services – Fixed Fee	Project management services associated with the migration of HTE NaviLine Planning & Engineering project data into Community Development.	\$780.00
3) Public Administration GIS Services – Fixed Fee	GIS updating script for HTE NaviLine land management system.	\$4,875.00
<i>Subtotal</i>		\$27,830.00
<i>Contingency</i>		\$5,000.00
Total Cost		\$32,830.00

As noted earlier, all the cost of Amendment #5 including the contingency will be covered by the two grants the City received from the State Housing and Community Development (HCD) Department under Senate Bill 2, the Planning Grant Program (PGP) and the Local Early Action Planning (LEAP) grant program. The goal of both grant programs is to provide funding to jurisdictions to improve their development processes and encourage the production of housing in California given the ongoing housing crisis.

POLICY / RULE

Pursuant to Section 2.36.080 of the Folsom Municipal Code, contracts for services exceeding the City Manager's contracting authority shall be awarded by the City Council. In this case, since the overall amount of the original contract was greater than the City Manager's contracting authority any change in the contract amount must be approved by the City Council.

ANALYSIS

The three services being provided by Superior are critical to the successful operation of not only the ComDev permitting software, but also the City's NaviLine Utilities billing program. Without these services, Community Development Department (CDD) would not have sufficient user licenses to enable other critical departments to use the software. Furthermore, without the amendment CDD staff would have to access two different software systems when searching for active and historic permit and project records. This will allow all records to be in one location that can be accessed by City staff and customers. Finally, because the City is currently using the NaviLine Utility billing software program, it is essential that the land data in ComDev and in NaviLine are both updated with the same information. As noted earlier, the total cost of the amendment will be covered by State grant funds. No City funds will be used.

FINANCIAL IMPACT

This Council action will approve the amendment with Superior in the amount of \$27,830 for the implementation of three additional services for the ComDev development project and permit tracking system, with the budget for this project to include a \$5,000 contingency for a grand total of \$32,830. All these costs will be covered by State grants that the Community Development Department received in Fiscal Year 2021. No City funds are required.

ENVIRONMENTAL REVIEW

The execution of an amendment to an existing contract for additional services for the implementation of the ComDev development project and permitting software is not considered a project under the California Environment Quality Act (CEQA) in accordance with CEQA Guidelines Section 15061(b)(3). As a result, this action is exempt from environmental review.

ATTACHMENTS

1. Resolution No. 10686 – A Resolution Authorizing the City Manager to Execute Amendment No. 5 to the Agreement (Contract No. 174-21 13-052) with Superior, LLC (now known as CentralSquare Technologies) to Increase the Number of User Licenses, Migrate Additional Project Data to the New Permitting System, and Develop a Custom Land Management Integration.
2. Detailed Project Timeline and History

Submitted,

A handwritten signature in blue ink, appearing to read "Pam Johns", with a long horizontal flourish extending to the right.

Pam Johns, Community Development Director

ATTACHMENT 1

Resolution No. 10686 – A Resolution Authorizing the City Manager to Execute Amendment No. 5 to the Agreement (Contract No. 174-21 13-052) with Superion, LLC (now known as CentralSquare Technologies) to Increase the Number of User Licenses, Migrate Additional Project Data to the New Permitting System, and Develop a Custom Land Management Integration

RESOLUTION NO. 10686

A RESOLUTION AUTHORIZING THE CITY MANAGER TO EXECUTE AMENDMENT NO. 5 TO THE AGREEMENT (CONTRACT NO. 174-21 13-052) WITH SUPERION, LLC (NOW KNOWN AS CENTRALSQUARE TECHNOLOGIES) TO INCREASE THE NUMBER OF USER LICENSES, MIGRATE ADDITIONAL PROJECT DATA TO THE NEW PERMITTING SYSTEM, AND DEVELOP A CUSTOM LAND MANAGEMENT INTEGRATION

WHEREAS, the City Council approved a Software License and Services Agreement with SunGard Public Sector Inc. to provide a suite of software solutions for the City Finance Department and the Community Development Department to address finance, payroll, electronic project and permit tracking, and electronic plan check services on December 10, 2013; and

WHEREAS, on March 30, 2016, the previous City Manager executed Amendment #1 to the original Software License and Services Agreement with SunGard Public Sector Inc. to update component systems for land management and permitting to reflect changes in software, technology and nomenclature (ONESolution to TRAKiT) with no budgetary change; and

WHEREAS, on November 13, 2018, the City Council approved Amendment #2 to the original Software License and Services Agreement with Superior LLC (formerly SunGard Public Sector Inc.) for \$98,230 to add additional software components and services necessary to provide enhanced customer service, including electronic payment option for customers, a citizen portal allowing customer access to project information, advanced GIS services, integration with the California State Licensing Board to validate contractor licenses, and the ability to schedule building inspections by phone; and

WHEREAS, in late 2018, the City was informed by Superior LLC that it would no longer provide electronic plan check services due to a change in its relationship with its third-party provider for electronic plan check services, Avolve Software; and therefore, Superior recommended that the City contract directly with Avolve; and

WHEREAS, the City and Superior LLC (now known as Central Square Technologies) executed Amendment #3 to the original Software License and Services Agreement that removed electronic plan check software and services from the original agreement, removed the \$80,080 in project management fees originally to be charged for these services, and credited back to the City a total of \$74,130.64, of which \$15,360 were project management fees and \$58,770.64 were maintenance fees previously paid by the City to Superior LLC; and

WHEREAS, on November 13, 2018, the City Council approved Resolution 10206 which amended the agreement (Amendment No. 4) to add 80 additional hours of project management services from Superior LLC to assist the City in the set up and installation of the new permitting software; and

WHEREAS, more user licenses are needed so that all City department personnel involved in the development review process will be able to use the new software; and

WHEREAS, there is a need for all active and historical permit and project data to be in one software system to allow for easy access for staff and customers; and

WHEREAS, a custom GIS script is required that will ensure that both the land management system for ComDev and NaviLine have the most up to date address and parcel information; and

WHEREAS, on April 9, 2019, in Resolution No. 10269 the Council authorized the Community Development Department to apply for \$310,000 in Senate Bill 2 – Planning Grant Program (PGP) grant funds from the State Department of Housing and Community Development (HCD) and on February 8, 2020, the City executed an agreement with HCD for the grant funds; and

WHEREAS, on April 28, 2020, in Resolution No. 10424 the Council authorized the Community Development Department to apply for \$300,000 in Local Early Action Planning (LEAP) grant funds from HCD and on December 28, 2020, the City executed an agreement with HCD for the grant funds; and

WHEREAS, the improvements to the City’s new development permitting software are eligible expenses under the terms of the PGP and LEAP grants; and

WHEREAS, approval of the amendment to the agreement and the allocation of funding is exempt from the California Environmental Quality Act (CEQA).

NOW, THEREFORE, BE IT RESOLVED that the City Council of the City of Folsom:

1. Authorizes the City Manager or her designee to execute Amendment No. 5 to the Software License and Services Agreement with Superior LLC.
2. Authorizes the City Manager or her designee to establish a contingency of \$5,000 for the project.
3. Authorizes the City Manager to use the PGP and LEAP grant funds for the costs associated with Amendment No. 5 and the contingency.

GENERAL FINDINGS

- A. SECTION 2.36.080, AWARD OF CONTRACTS OF THE FOLSOM MUNICIPAL CODE, STATES IN PART THAT CONTRACTS FOR SUPPLIES, EQUIPMENT, SERVICES, AND CONSTRUCTION WITH AN ESTIMATED VALUE OF \$62,657 OR GREATER SHALL BE AWARDED BY THE CITY COUNCIL.
- B. AMENDMENT OF THE EXISTING AGREEMENT WITH SUPERION LLC TO ADD MORE USER LICENSES, MIGRATE ALL PROJECT DATA, AND ADD A CUSTOM LAND MANAGEMENT INTEGRATION IS CRITICAL TO THE SUCCESSFUL

CONFIGURATION AND LAUNCH OF THE CITY'S NEW ONLINE
DEVELOPMENT PROCESSING AND PERMITTING SYSTEM.

- C. A CONTINGENCY IS NEEDED TO ENSURE THAT THERE ARE NO DELAYS TO
THE LAUNCH OF THE NEW SYSTEM THIS YEAR.

CEQA FINDINGS

- D. IN ACCORDANCE WITH CEQA GUIDELINES SECTION 15061(b)(3),
AMENDMENT OF A CONSULTANT CONTRACT IS NOT A PROJECT UNDER
CEQA AND IS EXEMPT FROM ENVIRONMENTAL REVIEW.

PASSED AND ADOPTED on this 24th day of August 2021, by the following roll-call vote:

AYES: Councilmember(s)
NOES: Councilmember(s)
ABSENT: Councilmember(s)
ABSTAIN: Councilmember(s)

ATTEST:

Michael D. Kozlowski, MAYOR

Christa Freemantle, CITY CLERK

ATTACHMENT 2

Detailed Project Timeline and History

DETAILED PROJECT TIMELINE AND HISTORY

The Community Development Department (CDD) is currently in the final months of its efforts to replace the 25-year-old development processing and permitting system known as HTE NaviLine. The new permitting system, now known as Community Development or ComDev, was formerly known as TRAKiT. This new software system will work with CDD's existing electronic plan review system, called ProjectDox, and will allow customers to complete all activities on-line including applying for building permits and development project entitlements, scheduling inspections, tracking the status of permits, and paying fees. CDD staff had hoped to launch this system in early 2020 before the pandemic struck, but due to delays from the vendor with software upgrades and frequent changes in project managers as a result of the acquisition of Superior LLC by Central Square Technologies, staff decided to put the effort on hold until these issues were worked out. Below is a detailed history of the project including prior amendments and related Council actions.

- In 2013, the City approved a contract with Superior, LLC (formerly SunGard Corporation) to upgrade the City's existing software system, which was comprised of HTE NaviLine and ONESolution to improve services for cash receipts, business account management, land management, building permits, planning and engineering services, and code compliance. The total contracted amount was \$722,788.
- On March 30, 2016, the previous City Manager executed Amendment #1 to the original Software License and Services Agreement with SunGard Public Sector Inc. to update component systems for land management and permitting to reflect changes in software, technology, and nomenclature (ONESolution to TRAKiT) with no budgetary change.
- On November 13, 2018, the City Council approved Amendment #2 to the original Software License and Services Agreement with Superior LLC (formerly SunGard Public Sector Inc.) for \$98,230 to add additional software components and services necessary to provide enhanced customer service, including electronic payment option for customers, a citizen portal allowing customer access to project information, advanced GIS services, integration with the California State Licensing Board to validate contractor licenses, and the ability to schedule building inspections by phone;
- Toward the end of 2018, the City was informed by Superior LLC that it would no longer provide electronic plan check services due to a change in its relationship with its third-party provider for electronic plan check services, Avolve Software. As a result, Superior recommended that the City contract directly with Avolve, which the City subsequently did.
- To revise the Agreement to reflect this change, the City and Superior LLC (now known as CentralSquare Technologies) executed Amendment #3 that removed electronic plan check software and services from the original agreement, removed the \$80,080 in project management fees originally to be charged for these services, and credited back to the City

\$74,130.64, which was comprised of \$58,770.64 in maintenance fees and \$15,360 in project management fees previously paid by the City to Superior LLC.

- Also, on November 13, 2018, the City Council approved Resolution 10206, which authorized the City Manager to execute Amendment #4. This amendment added 80 additional hours of project management services from Superior LLC to assist the City in the set up and installation of the new permitting software.
- Amendment #5, as noted earlier in this report, will increase the number of user licenses for the software from 25 to 75 so that all City department personnel involved in the development review process will be able to use the software. In addition, all permit and project data including historical records will be imported from HTE NaviLine into the new system. Finally, a custom GIS script will be prepared by Superior that will ensure that both the land management system for ComDev and NaviLine will have the most up to date address data given that EWR and Finance will continue to use the NaviLine Utilities program. (Note: The City had hoped to upgrade to a new utilities billing program from Superior that would use the same land management system as ComDev, but that program is not yet available from Superior). All the cost of this amendment will be covered by grants received by the City's Community Development Department from the State.

Table 2 on the following page shows the history of the amendments as well as the budgetary changes.

**Table 2
Contract History**

Date	Contract Amendment	Description	Amount
12/19/2013	Original Contract*	Contract for new software for CDD, Finance, Human Resources, Public Works, etc.	\$722,788.00
3/30/2016	Amend. #1	Software change from ONESolution Planning and Building to TRAKiT	\$0
5/22/2019	Amend. #2	Additional software features and services (e.g., advanced GIS, online payment, inspections by phone, etc.)	\$98,230.00
7/24/2019	Amend. #3	Removal of \$80,080 fee for electronic plan check	(\$80,080.00)
7/24/2019	Amend. #3**	Credit for removal of electronic plan check services from contract	(\$15,360.00)
7/24/2019	Amend. #4	Additional project management hours	\$12,800.00
8/24/2021	Amend. #5	Additional user licenses, data migration and custom GIS services.	\$27,830.00
8/24/2021	Contingency***	Additional funding for critical services only if needed.	\$5,000.00
	Grand Total		\$771,208.00

Notes:

*The original contract was for services beyond just those needed for the Community Development Department. Other software services included payroll, fleet management, finance, etc.

**In Amendment #3, while the City received a total credit of \$74,130.64, only \$15,360 project management fees were credited against the total contract amount. The rest (\$58,770.64) were annual maintenance fees previously paid by the City to Superior LLC and credited back to the City since no electronic plan review services were provided by Superior.

***Contingency to be used only if additional services are essential for the launch of the software.