



City Council Report

City Council Meeting: April 9, 2019
Agenda Item: 3.C

To: Mayor and City Council

From: Joseph Cevetello, Chief Information Officer, Information Services Department, Customer Experience and Support
David Martin, Director, Planning and Community Development

Subject: Third Modification to Agreement with Avolve Software for ProjectDox system to electronically process, manage, and monitor building permit application submittals and plan reviews

Recommended Action

Staff recommends that the City Council authorize the City Manager to negotiate and execute a third modification to Agreement No. 10279 (CCS), in the amount of \$42,570 with Avolve Software, an Arizona-based corporation, for professional services related to additional ProjectDox workflow implementations. This will result in a five-year amended agreement with a new total amount not to exceed \$267,441 with future year funding contingent on Council budget approval.

Summary

The City uses Avolve Software's ProjectDox system to electronically process, manage, and monitor building permit application submittals and plan reviews. Staff propose modifying Agreement No. 10279 (CCS) to implement three additional City processes (i.e. Temporary Traffic Control Plans, structural analysis report review, Construction Mitigation Plans) into ProjectDox to electronically manage, track, and streamline process workflows. Digitizing these workflows is part of the City's efforts to work more sustainably and efficiently and to enable customers to be more informed and productive through online tools and services. The total cost of these services would be \$42,570, resulting in a five-year amended agreement with a new total amount not to exceed \$267,441.

Discussion

The City uses a suite of software tools for permitting and plan review, one of which includes Avolve Software's (Avolve) ProjectDox as the electronic plan review system.

The software enables the public, design professionals, and architects to upload plan review submittals and supporting documents online, and provides an applicant the ability to view corrections and track a project's status as it moves through the City's plan review process. The software also provides functionality to enable staff to electronically review, markup, and comment on project plans, easily compare changes in the versions of plan sheets submitted in each round of plan review, and to approve the plans online. The functionality of ProjectDox and its workflows are optimal tools for purposes of coordinating and managing the review of projects, plans, and documents electronically. This type of functionality can be extended for review of other City applications beyond plan review.

The functionality of ProjectDox as a paperless project management, routing, and review software naturally lends itself to be useful in improving the efficacy of other City processes such as Temporary Traffic Control Plans, Structural Analysis Report Review, and Construction Mitigation Plans. These processes would be improved by using a template workflow created by Avolve. This template workflow would be used for intake, review, and management of application and plan submittals. This same template has the capability to be used for other City processes that are compatible with the simplified workflow. A brief summary of the three initially identified processes that would benefit from integration with ProjectDox is detailed below.

Temporary Traffic Control Plans: The review and approval of Temporary Traffic Control Plans (TTCP) is a process required whenever work is proposed in the public right-of-way to ensure that impacts to vehicular, bicycle, and pedestrian circulation are adequately mitigated. This review requires intake at the public counter of physical copies of plans and TTCP application. The communication process with the applicant for issuing corrections and receiving resubmittals occurs through email, which is cumbersome, inefficient, and disorganized. Integrating TTCPs into ProjectDox would move the submittal, review, and approval process to an electronic form that is simpler and more manageable for both the applicant and City staff.

Structural Analysis Report Review (Seismic Retrofit Program): The process for review of structural analysis reports requires the owners of properties identified as seismically vulnerable to submit a structural analysis report prior to submitting for plan review. Currently, applicants submit these reports to various City offices via email, physical

submittals, and/or postal mail. This process can be confusing and makes it difficult to adequately monitor intake and progress. The use of ProjectDox would streamline the process and would provide a central location where all related documentation can be easily accessed.

Construction Mitigation Plan: For more than a year, staff have been working on establishing a process to require the review and approval of a Construction Mitigation Plan (CMP) prior to the issuance of a building permit for a qualifying project. The purpose of a CMP is to comprehensively coordinate the various phases and activities of a construction project, and the activities of any nearby construction projects, to mitigate potential impacts caused by the construction such as right-of-way closures/obstructions, construction parking, material staging, deliveries, neighborhood notification, etc. Upon adoption of the CMP, the corresponding review and approval process could be integrated into ProjectDox.

These enhancements would enable staff to leverage the full benefits of the ProjectDox system and eliminate the need to submit paper plans. Staff seeks approval of a contract modification for the City to continue to work with Avolve to expand ProjectDox capabilities for other City processes.

Past Council Actions

<i>Meeting Date</i>	<i>Description</i>
04/12/16 (attachment A)	Professional Services Agreement for Electronic Plan Check Management System, ProjectDox Upgrade
02/13/18 (attachment B)	Second Modification to Agreement with Avolve Software for System Customization Services

Financial Impacts and Budget Actions

Staff seeks authority to increase the amount of Agreement No. 10279 (CCS) with Avolve Software for professional services related to workflow implementations.


Contract Modification Request				
Agreement #	Current Authorized Amount	Modified Request Amount	FY 2018-19 Budget Dept. Account #	Total Revised Contract Amount
10279 CCS	\$224,871	\$42,570	01700004.529230	\$267,441

Future year funding is contingent on Council budget approval.


Prepared By: Andy Pong, Lead Systems Analyst - Permitting Systems

Approved

Forwarded to Council



Joseph Cevetello, Chief Information Officer 3/28/2019



Rick Cole, City Manager 4/1/2019

Attachments:

- A. Attachment A - April 12, 2016 Staff Report (Web Link)
- B. Attachment B - February 13, 2018 Staff Report (Web Link)
- C. OAKS INITIATIVE FORM - Avolve Software Corp



CITY OF SANTA MONICA OAKS INITIATIVE NOTICE

NOTICE TO APPLICANTS, BIDDERS, PROPOSERS AND OTHERS SEEKING DISCRETIONARY PERMITS, CONTRACTS, OR OTHER BENEFITS FROM THE CITY OF SANTA MONICA

Santa Monica's voters adopted a City Charter amendment commonly known as the Oaks Initiative. The Oaks Initiative requires the City to provide this notice and information about the Initiative's requirements. You may obtain a full copy of the Initiative's text from the City Clerk.

This information is required by City Charter Article XXII—Taxpayer Protection. It prohibits a public official from receiving, and a person or entity from conferring, specified personal benefits or campaign advantages from a person or entity after the official votes, or otherwise takes official action, to award a "public benefit" to that person or entity. The prohibition applies within and outside of the geographical boundaries of Santa Monica.

All persons or entities applying or receiving public benefits from the City of Santa Monica shall provide the names of trustees, directors, partners, and officers, and names of persons with more than a 10% equity, participation or revenue interest. An exception exists for persons serving in those capacities as volunteers, without compensation, for organizations exempt from income taxes under Section 501(c)(3), (4), or (6), of the Internal Revenue Code. However, this exception does not apply if the organization is a political committee or controls political committees. Examples of a "public benefit" include public contracts to provide goods or services worth more than \$25,000 or a land use approval worth more than \$25,000 over a 12-month period.

In order to facilitate compliance with the requirements of the Oaks Initiative, the City compiles and maintains certain information. That information includes the name of any person or persons who is seeking a "public benefit." If the "public benefit" is sought by an entity, rather than an individual person, the information includes the name of every person who is: (a) trustee, (b) director, (c) partner, (d) officer, or has (e) more than a ten percent interest in the entity. Therefore, if you are seeking a "public benefit" covered by the Oaks Initiative, you must supply that information on the Oaks Initiative Disclosure Form. This information must be updated and supplied every 12 months.



CITY OF SANTA MONICA OAKS INITIATIVE DISCLOSURE FORM

In order to facilitate compliance with the requirements of the Oaks Initiative, the City compiles and maintains certain information. That information includes the name of any person or persons who is seeking a "public benefit." If the "public benefit" is sought by an entity, rather than an individual person, the information includes the name of every person who is: (a) trustee, (b) director, (c) partner, (d) officer, or has (e) more than a ten percent interest in the entity.

Public benefits include:

1. Personal services contracts in excess of \$25,000 over any 12-month period;
2. Sale of material, equipment or supplies to the City in excess of \$25,000 over a 12-month period;
3. Purchase, sale or lease of real property to or from the City in excess of \$25,000 over a 12- month period;
4. Non-competitive franchise awards with gross revenue of \$50,000 or more in any 12-month period;
5. Land use variance, special use permit, or other exception to an established land use plan, where the decision has a value in excess of \$25,000;
6. Tax "abatment, exception, or benefit" of a value in excess of \$5,000 in any 12-month period; or
7. Payment of "cash or specie" of a net value to the recipient of \$10,000 in any 12-month period.

Name(s) of persons or entities receiving public benefit:

Avolve Software Corp

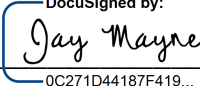
Name(s) of trustees, directors, partners, and officers:

Gary Heath-CEO/President
Jay Mayne-CFO/Secretary

Name(s) of persons with more than a 10% equity, participation, or revenue interest:

Gary Heath, Carl Strain, and Ronald Loback

Prepared by: Jay Mayne Title: CFO

Signature:  Date: 2/12/2019
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Email: jmayne@avolvesoftware.com Phone: 480-526-8780

FOR CITY USE ONLY:

Bid/PO/Contract # _____ Permit # _____

REFERENCE:

Modified

Agreement No. 10279 (CCS)