

M E M O R A N D U M

To: Howard Tipton, Town Manager

From: Allen Parsons, AICP
Director, Planning, Zoning & Building Department

Report date: January 26, 2024

Meeting date: February 5, 2024

Subject: New Planning, Zoning and Building Department Permitting System Update

Recommended Action

None, informational only.

Background

Staff will be providing a status update on the Town Commission approved FY 2024 budget item to transition the Town's enterprise computer recordkeeping system for the Planning/Building/Fire Prevention/Code Enforcement services to a more efficient and effective platform.

The new platform, called "Accela," will integrate with the Town's current enterprise software system, called "BS&A," for finance purposes and will replace the current Building/Code Enforcement module of the BS&A system. The current Building/Code Enforcement module has a number of challenges including: speed affecting input, plan review and documentation hindering staff efficiency; limited ability to automate inspection scheduling; inability to work on multiple properties/permits at a time; limitations on viewing historical information on properties/projects/permits without having to click through permit/project specific data trees; challenging user interface; difficulty extracting data for reporting; limitations on online submittals of applications or Code Enforcement violations; limitations on resulting building inspections and Code Enforcement violations in the field; the program is not map enabled; technical support is not provided internally, resulting in additional costs and staff time spent resolving technical issues; and information can be challenging for the public to find online.

The Accela system is familiar to contractors and is used by both Sarasota and Manatee Counties, as well as all of the Southwest Florida counties from Pinellas County to Lee County. The system was selected for the Town based on a number of factors including:

- **Citizen Engagement:** Providing user-friendly self-service options to access services, submit applications or Code Enforcement violations, and track progress in real-time, promoting transparency and empowering constituents.
- **Contractor and Staff Efficiencies:** Will allow for all permits and applications to be submitted electronically and reviewed electronically. Contractors and property owners will be able to see real time status updates. Inspections will be able to be

scheduled electronically and resulted in the field by staff, with results available in real-time.

- **Mobile Enablement:** The platform is designed to be mobile-first, allowing staff to work efficiently from any location. Staff will be able to access and update data in real-time, reducing paperwork, and improving productivity.
- **Reporting and Analytics:** The platform has robust reporting and analytics capabilities, enabling the Town's extensive collected data to be more easily analyzed and visualized to allow for better measures of performance, identification of trends, and to make better informed decisions for resource allocation and process optimization.
- **Geographic Information Systems (GIS) Mapping Integration:** The platform includes a mapping component that is integrated with the database information allowing the public and staff to search for information on specific properties by clicking on a map interface. GIS also offers several advantages, including seeing information spatially, which can assist with improved decision-making, efficient resource allocation, and trend spotting.

Funding for the project, in the overall amount of \$550,000 (from the Enterprise Building Fund), which includes \$122,000 for the software and \$328,000 for implementation (plus contingency funding), was allocated as part of the FY 2024 budget. The project also included funding for a Business Analyst position in the IT Department. The position is being funded at an 80/20 ratio, split between the Building Fund and the General Fund. The hired Business Analyst, Lourdes Alcox, has been an outstanding addition to the Town with the added bonus of previous experience with the City of Bradenton, where she was involved with converting their permitting system to Accela.

The project was kicked-off on November 6, 2023, with an overall project timeline of 15-months, which has the new system operating by the end of 2024. The project includes multiple deliverables (see attached Project Overview/Status Table). Highlights include:

- **Project Initiation** – Covering the kick-off, preparation, negotiations and initiation costs to begin the project.
- **Analysis** – Including capturing all record/permit types, their workflows, analysis of the processes, identification of future requirements, and recommendations to improve policies and procedures.
- **Configuration** – Adapting the Accela system to agreed upon workflows and processes along with customizations that are Town-specific.
- **Interfaces** – Integrating Accela to connect to the Town's enterprise financial system (BS&A); plan review software (ePlan Review); credit card processing system (Invoice Cloud); IT systems (Azure AD); records repository (Laserfiche); mapping software (ESRI ArcGIS).
- **Data Conversion** – The scope of work included the ability to convert data from the current system (BS&A). Staff is evaluating the costs-benefits of archiving

appropriate data from the current system, which may result in an overall reduction in the project timeline and will result in significant savings of staff time and enhanced data quality in the new system.

- Scripting – Developing custom business rules that are coded into the system to account for any unique rules that cannot be configured with system tools.
- Reporting – Development of unique reports that may need to be built as necessary.
- Training – Including end-user classroom training and system administrator training including reporting and scripting.
- User Acceptance Testing – After training, users will confirm and accept the usability of the configured system. Testing identifies any shortcomings that need to be addressed prior to go-live.
- Go-Live – Onsite personnel will oversee the go-live and assist users if any issues come up. Full transition to Accela for public use.
- Post Go-Live Support – RedMark personnel oversee initial support and manage any additional requested changes before hand-off to Accela support.

Staff has a busy year ahead in managing all ongoing responsibilities while allocating time to ensure that transition to the new software system delivers on streamlining operations, enhancing efficiencies, and delivering better services to the Town while maximizing the value of our technology investments.

Staff Recommendation

None, informational only.

Attachment

Accela Project Overview/Status Table (Available in Town Clerk's Office)

End of Agenda Item