



# City of Palo Alto

## City Council Staff Report

(ID # 6079)

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**Report Type: Consent Calendar**

**Meeting Date: 10/5/2015**

**Summary Title: Amendment to Truepoint**

**Title: Approval of Amendment Number Three to Contract S13149314 with Truepoint Solutions, LLC in the Amount of \$290,000 to Provide Support for Accela Software Applications and Blueprint Initiatives, for a Total Contract Amount Not to Exceed \$942,800**

**From: City Manager**

**Lead Department: Development Services Department**

### **Recommendation**

Staff recommends that Council authorize the City Manager to execute Amendment Number Three with TruePoint Solutions, LLC (TruePoint) to increase compensation by \$290,000 for a total contract amount not to exceed \$942,800.

### **Executive Summary**

Development Services originally contracted with TruePoint in March of 2013 to provide on-site assistance and support for a two phase project that included upgrading Accela to a newer version and identifying opportunities for Accela based applications. In December of 2013 the contract was extended three years to accommodate phase three, which related to project implementations and ongoing support at an anticipated 20 hours per week. Due to new initiatives and expansion of projects to other City departments, Development Services has reevaluated the need at approximately 35 hours per week over the life of the contract. The request to increase compensation will allow City departments to continue with projects in progress and in queue. The need for technologist support will be reexamined upon expiration of the contract in December of 2016.

### **Background**

On September 6, 2011, the Council approved staff recommendations to implement the **City of Palo Alto Development Center "Blueprint" project to streamline and modernize the City's permit process, focusing on improving customer satisfaction and inter-departmental efficiency.** As directed by the Council, staff has focused on the implementation and transition to the coordinated permit system design, restructuring of the organization, technology upgrades, and performance measurements.

On December 5, 2011, (Staff Report 2364) the Council approved a Budget Amendment Ordinance (BAO 5134) for implementation of the Blueprint process plan for the Development Center, including appropriations of \$935,600 for technology enhancements and a projection for an additional \$802,401 for technology enhancements in Fiscal Year 2013. In total, \$1.7 million in funding was incorporated into Capital Improvement Project (CIP) TE-12001 for Development Center Blueprint Tech Enhancements.

## **Discussion**

Accela provides the City with software licensing, software maintenance, and capabilities to track, schedule, and bill planning and building permits. As this is a highly technical **vendor, the Blueprint plan called out for a “technologist” to provide** technical and user support in the office and in the field, create and support reporting data, and to serve as a knowledge liaison between users, Accela, and the City staff and consultants.

In 2013, The City released a Request for Proposals (RFP) for **“technologist”** support of Blueprint enhancements, sending copies of the RFP to at least seven firms. TruePoint was the only company to respond. As the City already has a contract in place with TruePoint to support other Accela applications, Council is being requested to authorize an increase in compensation to provide additional support necessary to complete projects in progress and in queue.

As part of Blueprint initiatives, TruePoint has assisted with upgrading Accela Classic to Accela Vantage 360 (V360), **transitioning the use of Velocity Hall to Accela’s Citizen Access (ACA)**, interfacing the **City’s** Geographic Information System (GIS) with Accela, implementing Accela Mobile Office (AMO) applications for inspectors in the field, and creating reporting data to reflect performance measures, permit activity, and staff workloads. These enhancements give users and/or City staff more flexibility and easier access to schedule, submit, view, pay, or obtain status of permits.

With approval to increase compensation, TruePoint will assist Development Services, Planning, Public Works, and Fire Prevention with projects such as expanding the number of online permits offered, updating fee calculators in Accela, automating expired permit notifications, enhancing scheduling capabilities, automating the Use & Occupancy process, and developing an online plan review system that will allow for paperless submittal and review. TruePoint will continue to act as a conduit between Accela and the City to further enhance knowledge, utilization, and capabilities of the Accela product, as well as offer support for new features, scripting, configuration, & reporting. Development Services intends on re-assessing the need for technologist support upon expiration of the contract in December of 2016.

## **Resource Impact**

The requested extension will be funded through existing operating and capital budget

resources, including the Development Center Blueprint Technology Enhancement CIP Project (TE-12001). This CIP project has a total budget of \$1.7 million, of which \$946,012 is remaining. The intended use of this budget is for the implementation of new Blueprint project initiatives. The Development Services department will also utilize funding sources available within the departments operating budget to support ongoing Accela support and maintenance functions, including troubleshooting errors, report writing, and minor enhancements or changes. A total of \$120,000 is budgeted and available in the Development Services department budget this fiscal year. Additionally, as other departments utilize TruePoint services, sufficient funding is available in their respective operating budgets to support multi-department initiatives.

### **Policy Implications**

**Approval of this contract is consistent with Council's direction** to implement the City of Palo Alto Development Center "Blueprint" project to streamline and modernize the City's permit process.

### **Attachments:**

- Attachment A: Contract Number S13149314 TRUEPOINT AMENDMENT No 3 (PDF)

**AMENDMENT NO. 3 TO CONTRACT NO. S13149314  
BETWEEN THE CITY OF PALO ALTO AND  
TRUEPOINT SOLUTIONS, LLC**

This Amendment No. 3 to Contract No. S13149314 (“Contract”) is entered into on the 5<sup>th</sup> day of October, 2015, by and between the **CITY OF PALO ALTO**, a California chartered municipal corporation (“CITY”), and **TRUEPOINT SOLUTIONS, LLC** a California limited liability company, located at 3262 Penryn Road, Suite 100-B, Loomis, California, 95650, and Telephone (916) 259-1293 (“CONSULTANT”).

**RECITALS**

A. The Contract was entered into between the parties for the provision of specialized services to manage and mentor five primary divisions (Public Works, Utilities, Planning, Building, and Fire) who use the Accela product.

B. CITY Intends to increase the compensation from \$652,800.00 by \$ 290,000.00 to \$942,800.00 for the continuation of services as specified in Exhibits “A” Scope of Services & “A1” Additional Scope of Services.

B. The parties wish to amend the Contract.

NOW, THEREFORE, in consideration of the covenants, terms, conditions, and provisions of this Amendment, the parties agree:

SECTION 1. Section 4, COMPENSATION is hereby amended to read as follows:

**“SECTION 4. NOT TO EXCEED COMPENSATION.** The compensation to be paid to CONSULTANT for performance of the Services described in Exhibit “A”, including both payment for professional services and reimbursable expenses, shall not exceed Nine Hundred Forty Two Thousand Eight Hundred Dollars (\$942,800.00). The applicable rates and schedule of payment are set out at Exhibit “C-1”, entitled “RATE SCHEDULE,” which is attached to and made a part of this Agreement.

Additional Services, if any, shall be authorized in accordance with and subject to the provisions of Exhibit “C”. CONSULTANT shall not receive any compensation for Additional Services performed without the prior written authorization of CITY. Additional Services shall mean any work that is determined by CITY to be necessary for the proper completion of the Project, but which is not included within the Additional Scope of Services described at Exhibit “A1”

SECTION 2. The following exhibit(s) to the Contract is/are hereby amended to read as set forth in the attachment(s) to this Amendment, which are incorporated in full by this reference:

a. Exhibit “C” entitled “COMPENSATION”.

SECTION 3. Except as herein modified, all other provisions of the Contract, including any exhibits and subsequent amendments thereto, shall remain in full force and effect.

IN WITNESS WHEREOF, the parties have by their duly authorized representatives executed this Amendment on the date first above written.

**CITY OF PALO ALTO**

**TRUEPOINT SOLUTIONS, LLC**

DocuSigned by:  
*Kent Johnson*  
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CEO

APPROVED AS TO FORM:

Attachments:

EXHIBIT "C":      COMPENSATION

## **EXHIBIT "C" COMPENSATION**

The CITY agrees to compensate the CONSULTANT for professional services performed in accordance with the terms and conditions of this Agreement based on the rate schedule attached as Exhibit C-1.

The compensation to be paid to CONSULTANT under this Agreement for all services described in Exhibits "A" & "A1" ("Services") and reimbursable expenses shall not exceed \$942,800.00. CONSULTANT agrees to complete all Services, including reimbursable expenses, within this amount. Any work performed or expenses incurred for which payment would result in a total exceeding the maximum amount of compensation set forth herein shall be at no cost to the CITY.

### **REIMBURSABLE EXPENSES**

The administrative, overhead, secretarial time or secretarial overtime, word processing, photocopying, in-house printing, insurance and other ordinary business expenses are included within the scope of payment for services and are not reimbursable expenses. CITY shall reimburse CONSULTANT for the following reimbursable expenses at cost. Expenses for which CONSULTANT shall be reimbursed are:

B. Long distance telephone service charges, cellular phone service charges, facsimile transmission and postage charges are reimbursable at actual cost.

All requests for payment of expenses shall be accompanied by appropriate backup information. Any expense shall be approved in advance by the CITY's project manager.

### **ADDITIONAL SERVICES**

The CONSULTANT shall provide additional services only by advanced, written authorization from the CITY. The CONSULTANT, at the CITY's project manager's request, shall submit a detailed written proposal including a description of the scope of services, schedule, level of effort, and CONSULTANT's proposed maximum compensation, including reimbursable expenses, for such services based on the rates set forth in Exhibit C-1. The additional services scope, schedule and maximum compensation shall be negotiated and agreed to in writing by the CITY's Project Manager and CONSULTANT prior to commencement of the services. Payment for additional services is subject to all requirements and restrictions in this Agreement.