

CITY OF PALM DESERT STAFF REPORT

MEETING DATE: November 16, 2023

PREPARED BY: Clayton von Helf, Information Systems Manager

REQUEST: PURCHASE AND IMPLEMENTATION OF CLARITI PERMITTING AND
LAND MANAGEMENT SYSTEM

RECOMMENDATION:

1. Appropriate \$2,006,375, plus a 10% contingency (\$200,637), from Unassigned General Fund Balance Reserve to the appropriate Information Technology Accounts for the purchase and implementation of Clariti Land Management System (LMS).
2. Approve and authorize the City Manager to finalize and execute an agreement with Clariti Cloud, Inc. for land management software subscription licensing for a four-year term for \$1,255,949 total, \$299,075 due year one.
3. Approve and authorize the City Manager to finalize and execute an agreement with Speridian for implementation costs of \$1,225,800.
4. Approve and authorize the City Manager to finalize and execute an agreement with Park Consulting Group for consulting services and project management for a one-year agreement not to exceed \$481,500.
5. Authorize the City Manager to review and approve contract amendments and change orders up to contingency amount, for any unforeseen circumstances associated with each agreement, per Section 3.30.170 of Ordinance No. 1392.
6. Authorize City Attorney to make necessary, non-monetary changes to any of the agreements and authorize City Manager to execute any documents necessary to facilitate the contract award and implementation of the LMS.

BACKGROUND/ANALYSIS:

A Land Management System digitally manages all permitting, planning, and other land-based activities under the jurisdiction of the City. Our current Land Management System is TRAKiT, from the software company CentralSquare. TRAKiT was implemented in 2016, shortly after CentralSquare acquired CRW, the original developer of the TRAKiT software. This was a much-needed upgrade to our former AS/400 system, that was no longer supported. Since 2017 staff has been using TRAKiT to increase efficiency in our permitting and land management operations and provide customers with an expedited experience. Although the transition improved efficiencies compared to our prior system, we are still very far behind when compared to modern land management systems. The LMS is a critical tool for the daily operations of various departments involved in land management services. The TRAKiT system has become outdated as the software's limitations and structure do not allow any further improvement. Some of the more significant issues with TRAKiT are as follows:

Issue	Root Cause	Impact on staff
Web Portal	Built on dated, non-adaptive software, and missing basic functionality	The public facing portal has limited functionality and is not as user-friendly as staff would like. Increases foot traffic and phone calls for simple services that should be handled online, like scheduling an inspection or applying for a permit.
GIS Integration	Very limited GIS capabilities, GIS data is only pulled into TRAKiT, no GIS data can be pulled out	The only option for GIS based analysis and reporting is a very labor-intensive manual method. No options for live dashboards, interactive maps, or geo-based analysis. No way to provide a web-based permit activity map for the public.
Report Capabilities	Reporting tool is lacking basic functionality and features.	Very difficult or impossible to build reports for performance, internal management, state reporting, budgetary trends. Highly inefficient to perform basic reporting, keeping staff from making data driven decisions.
Field Staff Usage	TRAKiT is not accessible from mobile devices in the field.	Staff must use a laptop and VPN connection for fieldwork. This is cumbersome and time consuming and limits the mobility of field staff.
Software Enhancements	Lack of development from CentralSquare for the TRAKiT application	The software has been plagued with bugs and performance issues. Integrations with other systems are not possible – even other systems from CentralSquare. This often results in double entry of data into the other systems.
Customer Support	Poor customer support from CentralSquare	Issues and software bugs are not resolved in a timely manner. Poor quality control on updates and patches increases data risks for staff and creates inefficient workflows.
Automation	Software built on older architecture	Simple tasks like automated emails or routing do not exist or are very limited. This creates extra, outside of the system work that interferes with our ability to serve the customer.

Benefits of a Modern Land Management System

Upgrading to a new modern land management system will **improve customer service** and **reduce operational costs**. The City will be able to build on the public portal to assist the public with quicker and easier permitting and plan review requests and enhance field staff's access to the system from mobile devices expediting turnaround times.

Modern land management systems are more easily configurable, allowing business staff to make application updates quickly and easily without relying on IT staff or the parent software company. This will increase the speed to deliver customer service and save money. A modern land management system will offer more sophisticated configuration capability, automated approval workflows, and more seamless integration between the City's various systems, online payment portals, electronic plan review, self-service portal, and GIS. This results in quicker access times and enhanced data integrity, which improves operational efficiency.

Modern systems also provide much-improved reporting capabilities, including real-time comprehensive data analytics that support management decision making, staff, and operations. Additionally, our current software is hosted on City servers requiring regular staff maintenance and backup as opposed to a modern cloud-based system.

Selection Process

Staff began to evaluate other providers of land management systems in September 2022. Specifically looking for software that was built on a modern platform and would allow us to update our business processes and integrate with our other systems. This will give us a single source of truth – by integrating GIS, email, document management, and live web-based dashboard reporting. We also looked for systems with a robust public portal to make our development services departments transparent and user friendly to citizens and customers. Having modern, cloud-based software will also give us more capabilities for in-field staff, and better business resilience.

Staff contacted a subject matter expert, Park Consulting Group (PCG), and compared five land management software (LMS) solutions. The comparisons included written proposals and live demonstrations of the systems and capabilities, with questions from city staff. The selection committee was staffed by both frontline staff and department leadership. Staff focused on the ease of use of the solution, overall functionality, and customer support.

Pursuant to Section 3.30.080 (E) of the Purchasing Policy, contracts for professional services shall be awarded to the consultant who will best serve the interests of the city, taking into account the demonstrated competence, professional qualifications and suitability for the project in general. The city may consider cost of professional services if determined to be a relevant factor under the circumstances, but cost shall not be the sole determining factor. Out of the five LMS solutions, **staff chose the Clariti solution** as the overall best choice for our needs.

Clariti is a cloud-based solution that uses the Salesforce CRM platform. The software meets all our requirements – robust public portal, two-way GIS integration, integration with email and document management, accessible from a mobile device for field staff, and very flexible workflows that can be customized to our needs. Clariti also has a very open platform, making future integrations with other systems used by the city possible in the future. This solution was also rated highly for ease of use by our frontline staff. They found Clariti to be the most user-friendly and easily configurable, boasting a modern, aesthetically pleasing user interface for the public. Configuration of the public portal will allow many permitting services to be streamlined through a combination of smart workflow configurations and automation of simple tasks. This will increase our customer service capabilities and the accuracy of our information. Through a robust GIS connection there will be visualization capabilities for our data that are not available to us now. The Clariti solution will allow for increased transparency, for both internal and external customers, giving us interactive ways to visualize development activities in the city.

Legal Review:

This report has been reviewed by the City Attorney's office

FINANCIAL IMPACT:

Staff recommends a vigorous implementation schedule of 14 months. The software agreement with Clariti is for four years, paid annually and subject to budget approval. The cost in year one is \$299,075 with a 5% increase each year. This will be part of the City’s annual software costs. The total four-year project cost is \$3,148,874. This includes implementation services, training, data migration, and configuration. A contract with Park Consulting Group (PCG), a third-party subject matter expert, to help build the system following best practices and provide additional project management is also included in this total project cost. The inclusion of PCG is intended to ensure successful implementation and limit impact to customers. See below for a breakdown of our projected costs.

	<i>Year One Go-Live</i>	<i>Year Two</i>	<i>Year Three</i>	<i>Year Four</i>	<i>Four Year Total</i>
PCG Consulting	\$481,500				\$481,500
Implementation	\$1,225,800				\$1,081,800
Annl Software Costs	\$299,075	\$303,529	\$318,705	\$334,640	\$1,255,949
Annl Support/Maint		\$50,625	\$67,500	\$67,500	\$185,625
Totals	\$2,006,375	\$354,154	\$386,205	\$402,140	\$3,148,874

A portion of these costs may be recovered through impact fees and will be considered within the current fee study that is anticipated to be completed prior to FY 2024/25.

ATTACHMENTS:

1. Draft Speridian Implementation Contract
2. Speridian Implementation Proposal
3. Clariti Software Agreement
4. Park Consulting Group Contract