



# City of San Leandro

Meeting Date: July 18, 2016

## Staff Report

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**File Number:** 16-366 **Agenda Section:** CONSENT CALENDAR

**Agenda Number:** 8.K

**TO:** City Council

**FROM:** Chris Zapata  
City Manager

**BY:** Jeff Kay  
Acting Assistant City Manager

**FINANCE REVIEW:** David Baum  
Finance Director

**TITLE:** Staff Report for a Resolution Approving a Non-Professional Services Agreement with 21Tech, LLC for Development and Improvements on the Accela Permit System (in an amount not to exceed \$85,000)

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### SUMMARY AND RECOMMENDATIONS

Staff recommends that the City Council approve a resolution making a sole source finding under California Public Contract Code section 3400(c)(2) and authorizing the City Manager to negotiate and execute a Non-Professional Services agreement for the services needed to improve and enhance functionality on the City of San Leandro's Accela permit system. The contract is valued at \$85,000.00.

### BACKGROUND

The Accela permit system is used by the Community Development, Engineering and Transportation, and Public Works Departments' staff as well as Alameda County Fire staff to manage planning, permitting and inspection services. The system is used to calculate and collect permit fees, track plan check comments and approvals, issue permits, maintain permit and inspection history and schedule inspections. The Accela system, a cloud computing application, was implemented in February 2015 to replace the Tidemark Advantage permit system, which was dated and no longer supported.

In November, 2015 staff issued a Request for Proposals (RFP) for consulting services related to the Accela implementation and selected 21 Tech, LLC as the service provider. 21Tech was able to resolve some of the major issues of system functionality to enable on-line inspections, correct workflow assignments, and establish some reporting functions and other improvements. Additional enhancements and improvements are still needed.

### Analysis

Several areas need improvement and additional functionality could be added that would

greatly increase the effectiveness of the Accela system. The following improvements and enhancements have been identified:

- Integration of the City's geographic information system (GIS) data
- Integration with the Eden, City's financial system
- Creation of additional reports for tracking of activity, revenue received, building code enforcement, and permits outstanding
- Creation of additional user groups for the Water Pollution Control Plant, Public Works and Environmental Services for comments and approvals of wastewater connections, trash enclosures and construction debris plans, and hazardous material and disposal plans.
- Creation of a Bank Service Fee tab within the payment module in order to collect the 2.5% credit card convenience fee.
- Enhancements to the Accela Citizen Access portal that is used by customers to schedule inspections and interact with City services.

In November, 2015 staff solicited competitive bids to identify a consultant for Accela services. Three firms responded, including: 21Tech, LLC, InterWest, and Avocette. Given its deep expertise in Accela and GIS software, low cost per hour, and strong references, including one from the City and County of San Francisco, 21Tech, LLC was selected for the project. In addition, it is necessary for the City Council to make a sole source purchase justification to award the contract to 21Tech LLC, in accordance with California Public Contract Code section 3400(c)(2). This new agreement would build on work 21Tech LLC already did under a previous agreement, and because it is a natural extension to a previously competitively awarded contract, a sole source finding is justified to match work done on a previously completed project.

### **Current Agency Policies**

- 2015 City Council Goal: Advance projects and programs promoting sustainable economic development, including transforming San Leandro into a center for innovation
- 2015 City Council Goal: Maintain and enhance San Leandro's infrastructure

### **Previous City Council Actions**

- On July 15, 2013, the City Council approved a Consultant Services Agreement with TruePoint Solutions to Migrate and Configure the Tidemark Permitting Software System from Accela, Inc to Accela Automation/Civic Council in the Amount of \$208,900.

### **Legal Analysis**

The City Attorney's office reviewed and approved the Non-Professional Services agreement.

### **Fiscal Impacts**

The total one-time cost of this agreement is \$85,000.00.

The recommended funding sources are:

- \$31,667 carry-over in the fiscal year 2015-16 IT operating budget.
- \$40,000 in the fiscal year 2016-17 IT operating budget.
- \$6,667 in the fiscal year 2016-17 Engineering and Transportation operating budget, temporarily funded through the IT department.
- \$6,666 in the fiscal year 2016-17 Community Development operating budget.

**Budget Authority**

- The Finance Director determined there are sufficient funds in the 2016-17 IT operating budget Account 688-13-121-7410 for \$85,000.00 to be transferred to 688-13-121-5120;

**Attachment(s) to Staff Report**

- Non-Professional Services Agreement between the City of San Leandro and 21Tech, LLC.
- 21Tech, LLC Scope of Services and Pricing - Exhibit A and B
- City of San Leandro Request for Proposal for Accela Consultant Services, November, 2015.
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- Bid Response from 21Tech, LLC, November, 2015.
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- Sole Source Award Justification Form.

**PREPARED BY:** Tony Batalla, Information Technology Manager, City Manager's Office

2600546.1

**NON-PROFESSIONAL SERVICES AGREEMENT BETWEEN  
THE CITY OF SAN LEANDRO AND  
21Tech, LLC  
FOR  
Accela Improvements Project Phase 2**

THIS AGREEMENT for \_\_\_\_\_ services is made by and between the City of San Leandro ("City") and \_\_\_\_\_ 21Tech, LLC \_\_\_\_\_ ("Contractor") (together sometimes referred to as the "Parties") as of \_\_\_\_\_ 7/18 \_\_\_\_\_, 2016\_\_ (the "Effective Date").

**Section 1. SERVICES.** Subject to the terms and conditions set forth in this Agreement, Contractor shall provide to City the services described in the Scope of Work attached as Exhibit A at the time and place and in the manner specified therein. In the event of a conflict in or inconsistency between the terms of this Agreement and Exhibit A, the Agreement shall prevail.

**1.1 Term of Services.** The term of this Agreement shall begin on the Effective Date and shall end on \_\_\_\_\_ 7/18/2018 \_\_\_\_\_, the date of completion specified in Exhibit A, and Contractor shall complete the work described in Exhibit A on or before that date, unless the term of the Agreement is otherwise terminated or extended, as provided for in Section 8. The time provided to Contractor to complete the services required by this Agreement shall not affect the City's right to terminate the Agreement, as referenced in Section 8.

**1.2 Standard of Performance.** Contractor shall perform all services required pursuant to this Agreement in the manner and according to the standards observed by a competent practitioner of the profession in which Contractor is engaged.

**1.3 Assignment of Personnel.** Contractor shall assign only competent personnel to perform services pursuant to this Agreement. In the event that City, in its sole discretion, at any time during the term of this Agreement, desires the reassignment of any such persons, Contractor shall, immediately upon receiving notice from City of such desire of City, reassign such person or persons.

**1.4 Time.** Contractor shall devote such time to the performance of services pursuant to this Agreement as may be reasonably necessary to meet the standard of performance provided in Subsection 1.2 above and to satisfy Contractor's obligations hereunder.

**1.5 City of San Leandro Living Wage Rates.** This contract may be covered by the City of San Leandro Living Wage Ordinance (LWO). Bidder's attention is directed to the San Leandro Municipal Code, Title 1, Chapter 6, Article 6. Successful Bidder must submit completed self-certification form and comply with the LWO if covered.

**1.6**

**Section 2. COMPENSATION.** City hereby agrees to pay Contractor a sum not to exceed \$85,000.00 \_\_\_\_\_, notwithstanding any contrary indications that may be contained in Contractor's proposal, for services to be performed and reimbursable costs incurred under this Agreement.

In the event of a conflict between this Agreement and Contractor's proposal, attached as Exhibit B, regarding the amount of compensation, the Agreement shall prevail. City shall pay Contractor for services rendered pursuant to this Agreement at the time and in the manner set forth herein. The payments specified below shall be the only payments from City to Contractor for services rendered pursuant to this Agreement. Contractor shall submit all invoices to City in the manner specified herein. Except as specifically authorized by City in writing, Contractor shall not bill City for duplicate services performed by more than one person.

Contractor and City acknowledge and agree that compensation paid by City to Contractor under this Agreement is based upon Contractor's estimated costs of providing the services required hereunder, including salaries and benefits of employees and subcontractors of Contractor. Consequently, the Parties further agree that compensation hereunder is intended to include the costs of contributions to any pensions and/or annuities to which Contractor and its employees, agents, and subcontractors may be eligible. City therefore has no responsibility for such contributions beyond compensation required under this Agreement.

**2.1 Invoices.** Contractor shall submit invoices, not more often than once a month during the term of this Agreement, based on the cost for services performed and reimbursable costs incurred prior to the invoice date. Invoices shall contain the following information:

- Serial identifications of progress bills; i.e., Progress Bill No. 1 for the first invoice, etc.;
- The beginning and ending dates of the billing period;
- A Task Summary containing the original contract amount, the amount of prior billings, the total due this period, the balance available under the Agreement, and the percentage of completion;
- At City's option, for each work item in each task, a copy of the applicable time entries or time sheets shall be submitted showing the name of the person doing the work, the hours spent by each person, a brief description of the work, and each reimbursable expense;
- The total number of hours of work performed under the Agreement by Contractor and each employee, agent, and subcontractor of Contractor performing services hereunder;
- The Contractor's signature;
- Contractor shall give separate notice to the City when the total number of hours worked by Contractor and any individual employee, agent, or subcontractor of Contractor reaches or exceeds 800 hours within a 12-month period under this Agreement and any other agreement between Contractor and City. Such notice shall include an estimate of the time necessary to complete work described in Exhibit A and the estimate of time necessary to complete work under any other agreement between Contractor and City, if applicable.

- 2.2 Monthly Payment.** City shall make monthly payments, based on invoices received, for services satisfactorily performed, and for authorized reimbursable costs incurred. City shall have 30 days from the receipt of an invoice that complies with all of the requirements above to pay Contractor.
- 2.3 Final Payment.** City shall pay the last 10% of the total sum due pursuant to this Agreement within 60 days after completion of the services and submittal to City of a final invoice, if all services required have been satisfactorily performed.
- 2.4 Total Payment.** City shall pay for the services to be rendered by Contractor pursuant to this Agreement. City shall not pay any additional sum for any expense or cost whatsoever incurred by Contractor in rendering services pursuant to this Agreement. City shall make no payment for any extra, further, or additional service pursuant to this Agreement.
- In no event shall Contractor submit any invoice for an amount in excess of the maximum amount of compensation provided above either for a task or for the entire Agreement, unless the Agreement is modified prior to the submission of such an invoice by a properly executed change order or amendment.
- 2.5 Hourly Fees.** Fees for work performed by Contractor on an hourly basis shall not exceed the amounts shown on the compensation schedule attached hereto as Exhibit B.
- 2.6 Reimbursable Expenses.** Reimbursable expenses are specified in Exhibit B, and shall not exceed \$145\_\_\_\_\_. Expenses not listed in Exhibit B are not chargeable to City. Reimbursable expenses are included in the total amount of compensation provided under this Agreement that shall not be exceeded.
- 2.7 Payment of Taxes.** Contractor is solely responsible for the payment of employment taxes incurred under this Agreement and any similar federal or state taxes.
- 2.8 Payment upon Termination.** In the event that the City or Contractor terminates this Agreement pursuant to Section 8, the City shall compensate the Contractor for all outstanding costs and reimbursable expenses incurred for work satisfactorily completed as of the date of written notice of termination. Contractor shall maintain adequate logs and timesheets to verify costs incurred to that date.
- 2.9 Authorization to Perform Services.** The Contractor is not authorized to perform any services or incur any costs whatsoever under the terms of this Agreement until receipt of authorization from the Contract Administrator.
- 2.10 Liquidated Damages.** Failure of Contractor to respond to problems referred to it by City within the time limits established in Subsection 1.2 of this Agreement shall result in liquidated damages as set forth in Exhibit A.

**Section 3. FACILITIES AND EQUIPMENT.** Except as set forth herein, Contractor shall, at its sole cost and expense, provide all facilities and equipment that may be necessary to perform the services required by this Agreement. City shall make available to Contractor only the facilities and equipment listed in this section, and only under the terms and conditions set forth herein. Contractor shall make a written request to City to use facilities or equipment not otherwise listed herein.

**3.1 Safety Requirements.** In accordance with generally accepted construction practices and state law, Contractor shall be solely and completely responsible for conditions on the jobsite, including safety of all persons and property during performance of the work. This requirement shall apply continuously and not be limited to normal working hours.

Contractor shall take all necessary precautions and provide all necessary safeguards to prevent personal injury and property damage. Contractor shall provide protection for all persons including, but not limited to, its employees and employees of its subcontractors; members of the public; and employees, agents, and representatives of the City and regulatory agencies that may be on or about the work.

The services of the City in conducting review and inspection of Contractor's performance is not intended to include review of the adequacy of Contractor's work methods, equipment, bracing or scaffolding, or safety measures, in, on, or near any Contractor jobsite.

All work and materials shall be in strict accordance with all applicable state, city, county, and federal rules, regulations and codes, with specific attention to the United States Department of Labor Occupational Health and Safety Administration (OSHA) requirements. Contractor shall be solely responsible for compliance with all city, county, and state explosive transport, storage, and blasting requirements and for any damages caused by such operations.

Contractor is hereby informed that work on City property could be hazardous. Contractor shall carefully instruct all personnel working on City property that all conditions of the property are potentially hazardous work areas as to potential dangers and shall provide such necessary safety equipment and instructions as are necessary to prevent injury to personnel and damage to property. Special care shall be exercised relative to work underground.

In addition to complying with all other safety regulations, Contractor shall abide by any and all other City requirements contained in any specifications, special conditions or manuals, which shall be made available by City upon request.

Contractor shall provide and maintain all necessary safety equipment such as fences, barriers, signs, lights, walkways, guards, and fire prevention and fire-fighting equipment and shall take such other action as is required to fulfill its obligations under this section. It is the intent of the City to provide a safe working environment under normal conditions. CONTRACTOR IS ADVISED THAT CITY'S OPERATIONS AND PROPERTY ARE INHERENTLY HAZARDOUS BECAUSE OF CONDITIONS SUCH AS CONFINED

SPACES, POTENTIALLY EXPLOSIVE ATMOSPHERES, AND POSSIBLE EXPOSURE TO PATHOGENS.

Contractor shall maintain all portions of the jobsite in a neat, clean, and sanitary condition at all times. If required by the City, toilets shall be furnished by Contractor where needed for use of its employees and their use shall be strictly enforced. Contractor shall not use the City's existing sanitary facilities, unless previously authorized by the City.

Contractor shall keep adequate first aid facilities and supplies available and instruction in first aid for its employees shall be given.

City reserves the right to require that Contractor bring onto the project or engage the services of a licensed safety engineer at any time during the term of this Agreement. If Contractor does not have a licensed safety engineer on staff, then City may require that Contractor engage a subcontractor or subconsultant as the project's safety engineer. Contractor shall bear all costs in connection with meeting the requirements of this section.

**Section 4. INSURANCE REQUIREMENTS.** Before fully executing this Agreement, Contractor, at its own cost and expense, unless otherwise specified below, shall procure the types and amounts of insurance listed below against claims for injuries to persons or damages to property that may arise from or in connection with the performance of the work hereunder by the Contractor and its agents, representatives, employees, and subcontractors. Consistent with the following provisions, Contractor shall provide proof satisfactory to City of such insurance that meets the requirements of this section and under forms of insurance satisfactory in all respects, and that such insurance is in effect prior to beginning work to the City. Contractor shall maintain the insurance policies required by this section throughout the term of this Agreement. The cost of such insurance shall be included in the Contractor's bid. Contractor shall not allow any subcontractor to commence work on any subcontract until Contractor has obtained all insurance required herein for the subcontractor(s) and provided evidence that such insurance is in effect to City. VERIFICATION OF THE REQUIRED INSURANCE SHALL BE SUBMITTED AND MADE PART OF THIS AGREEMENT PRIOR TO EXECUTION. Contractor shall maintain all required insurance listed herein for the duration of this Agreement.

**4.1 Workers' Compensation.**

**4.1.1 General Requirements.** Contractor shall, at its sole cost and expense, maintain Statutory Workers' Compensation Insurance and Employer's Liability Insurance for any and all persons employed directly or indirectly by Contractor. The Statutory Workers' Compensation Insurance and Employer's Liability Insurance shall be provided with limits of not less than \$ 1,000,000.00 \_\_\_\_\_ per accident. In the alternative, Contractor may rely on a self-insurance program to meet those requirements, but only if the program of self-insurance complies fully with the provisions of the California Labor Code. Determination of whether a self-insurance program meets the standards of the California Labor Code shall be solely in the discretion of the Contract Administrator.



The Workers' Compensation policy shall be endorsed with a waiver of subrogation in favor of the entity for all work performed by the Contractor, its employees, agents, and subcontractors.

**4.1.2 Submittal Requirements.** To comply with Subsection 4.1, Contractor shall submit the following:

- a. Certificate of Liability Insurance in the amounts specified in the section; and
- b. Waiver of Subrogation Endorsement as required by the section.

**4.2 Commercial General and Automobile Liability Insurance.**

**4.2.1 General Requirements.** Contractor, at its own cost and expense, shall maintain commercial general liability insurance for the term of this Agreement in an amount not less than \$4,000,000.00\_\_\_\_\_ and automobile liability insurance for the term of this Agreement in an amount not less than \$\_1,000,000.00\_\_\_\_\_ per occurrence, combined single limit coverage for risks associated with the work contemplated by this Agreement. If a Commercial General Liability Insurance or an Automobile Liability form or other form with a general aggregate limit is used, either the general aggregate limit shall apply separately to the work to be performed under this Agreement or the general aggregate limit shall be at least twice the required occurrence limit. Such coverage shall include but shall not be limited to, protection against claims arising from bodily and personal injury, including death resulting therefrom, and damage to property resulting from activities contemplated under this Agreement, including the use of owned and non-owned automobiles.

**4.2.2 Minimum Scope of Coverage.** Commercial general coverage shall be at least as broad as Insurance Services Office Commercial General Liability occurrence form CG 0001 (most recent edition) covering comprehensive General Liability on an "occurrence" basis. Automobile coverage shall be at least as broad as Insurance Services Office Automobile Liability form CA 0001, Code 1 (any auto). No endorsement shall be attached limiting the coverage.

**4.2.3 Additional Requirements.** Each of the following shall be included in the insurance coverage or added as a certified endorsement to the policy:

- a. The Insurance shall cover on an occurrence or an accident basis, and not on a claims-made basis.
- b. City, its officers, officials, employees, and volunteers are to be covered as additional insureds as respects: liability arising out of work or operations performed by or on behalf of the Contractor; or automobiles owned, leased, hired, or borrowed by the Contractor.

- c. Contractor hereby agrees to waive subrogation which any insurer or contractor may require from vendor by virtue of the payment of any loss. Contractor agrees to obtain any endorsements that may be necessary to affect this waiver of subrogation.
- d. For any claims related to this Agreement or the work hereunder, the Contractor's insurance covered shall be primary insurance as respects the City, its officers, officials, employees, and volunteers. Any insurance or self-insurance maintained by the City, its officers, officials, employees, or volunteers shall be excess of the Contractor's insurance and shall not contribute with it.

**4.2.4 Submittal Requirements.** To comply with Subsection 4.2, Contractor shall submit the following:

- a. Certificate of Liability Insurance in the amounts specified in the section;
- b. Additional Insured Endorsement as required by the section;
- c. Waiver of Subrogation Endorsement as required by the section; and
- d. Primary Insurance Endorsement as required by the section.

**4.3 All Policies Requirements.**

**4.3.1 Acceptability of Insurers.** All insurance required by this section is to be placed with insurers with a Bests' rating of no less than A:VII.

**4.3.2 Verification of Coverage.** Prior to beginning any work under this Agreement, Contractor shall furnish City with complete copies of all Certificates of Liability Insurance delivered to Contractor by the insurer, including complete copies of all endorsements attached to the policies. All copies of Certificates of Liability Insurance and certified endorsements shall show the signature of a person authorized by that insurer to bind coverage on its behalf. If the City does not receive the required insurance documents prior to the Contractor beginning work, it shall not waive the Contractor's obligation to provide them. The City reserves the right to require complete copies of all required insurance policies at any time.

**4.3.3 Deductibles and Self-Insured Retentions.** Contractor shall disclose to and obtain the written approval of City for the self-insured retentions and deductibles before beginning any of the services or work called for by any term of this Agreement. At the option of the City, either: the insurer shall reduce or eliminate such deductibles or self-insured retentions as respects the City, its officers, employees, and volunteers; or the Contractor shall provide a financial guarantee

satisfactory to the City guaranteeing payment of losses and related investigations, claim administration and defense expenses.

**4.3.4 Wasting Policies.** No policy required by this Section 4 shall include a “wasting” policy limit (i.e. limit that is eroded by the cost of defense).

**4.3.5 Endorsement Requirements.** Each insurance policy required by Section 4 shall be endorsed to state that coverage shall not be canceled by either party, except after 30 days’ prior written notice has been provided to the City.

**4.3.6 Subcontractors.** Contractor shall include all subcontractors as insureds under its policies or shall furnish separate certificates and certified endorsements for each subcontractor. All coverages for subcontractors shall be subject to all of the requirements stated herein.

**4.4 Remedies.** In addition to any other remedies City may have if Contractor fails to provide or maintain any insurance policies or policy endorsements to the extent and within the time herein required, City may, at its sole option exercise any of the following remedies, which are alternatives to other remedies City may have and are not the exclusive remedy for Contractor’s breach:

- Obtain such insurance and deduct and retain the amount of the premiums for such insurance from any sums due under the Agreement;
- Order Contractor to stop work under this Agreement or withhold any payment that becomes due to Contractor hereunder, or both stop work and withhold any payment, until Contractor demonstrates compliance with the requirements hereof; and/or
- Terminate this Agreement.

**Section 5. INDEMNIFICATION AND CONTRACTOR’S RESPONSIBILITIES.**

Contractor shall indemnify, defend with counsel acceptable to City, and hold harmless City and its officers, officials, employees, agents and volunteers from and against any and all liability, loss, damage, claims, expenses, and costs (including without limitation, attorney’s fees and costs and fees of litigation) (collectively, “Liability”) of every nature arising out of or in connection with Contractor’s performance of the Services or its failure to comply with any of its obligations contained in this Agreement, except such Liability caused by the sole negligence or willful misconduct of City.

The Contractor’s obligation to defend and indemnify shall not be excused because of the Contractor’s inability to evaluate Liability or because the Contractor evaluates Liability and determines that the Contractor is not liable to the claimant. The Contractor must respond within 30 days, to the tender of any claim for defense and indemnity by the City, unless this time has been extended by the City. If the Contractor fails to accept or reject a tender of defense and indemnity within 30 days, in addition to any other remedy authorized by law, so much of the money due the Contractor under and by virtue of this Agreement as shall reasonably be considered necessary by the City, may be retained by the City until

disposition has been made of the claim or suit for damages, or until the Contractor accepts or rejects the tender of defense, whichever occurs first.

Notwithstanding the forgoing, to the extent this Agreement is a "construction contract" as defined by California Civil Code Section 2782, as may be amended from time to time, such duties of Contractor to indemnify shall not apply when to do so would be prohibited by California Civil Code Section 2782.

In the event that Contractor or any employee, agent, or subcontractor of Contractor providing services under this Agreement is determined by a court of competent jurisdiction or the California Public Employees Retirement System (PERS) to be eligible for enrollment in PERS as an employee of City, Contractor shall indemnify, defend, and hold harmless City for the payment of any employee and/or employer contributions for PERS benefits on behalf of Contractor or its employees, agents, or subcontractors, as well as for the payment of any penalties and interest on such contributions, which would otherwise be the responsibility of City.

**Section 6. STATUS OF CONTRACTOR.**

**6.1 Independent Contractor.** At all times during the term of this Agreement, Contractor shall be an independent contractor and shall not be an employee of City. City shall have the right to control Contractor only insofar as the results of Contractor's services rendered pursuant to this Agreement and assignment of personnel pursuant to Subsection 1.3; however, otherwise City shall not have the right to control the means by which Contractor accomplishes services rendered pursuant to this Agreement. Notwithstanding any other City, state, or federal policy, rule, regulation, law, or ordinance to the contrary, Contractor and any of its employees, agents, and subcontractors providing services under this Agreement shall not qualify for or become entitled to, and hereby agree to waive any and all claims to, any compensation, benefit, or any incident of employment by City, including but not limited to eligibility to enroll in the California Public Employees Retirement System (PERS) as an employee of City and entitlement to any contribution to be paid by City for employer contributions and/or employee contributions for PERS benefits.

**6.2 Contractor Not an Agent.** Except as City may specify in writing, Contractor shall have no authority, express or implied, to act on behalf of City in any capacity whatsoever as an agent. Contractor shall have no authority, express or implied, pursuant to this Agreement to bind City to any obligation whatsoever.

**Section 7. LEGAL REQUIREMENTS.**

**7.1 Governing Law.** The laws of the State of California shall govern this Agreement.

**7.2 Compliance with Applicable Laws.** Contractor and any subcontractors shall comply with all laws applicable to the performance of the work hereunder.

**7.3 Other Governmental Regulations.** To the extent that this Agreement may be funded by fiscal assistance from another governmental entity, Contractor and any subcontractors shall comply with all applicable rules and regulations to which City is bound by the terms of such fiscal assistance program.

**7.4 Licenses and Permits.** Contractor represents and warrants to City that Contractor and its employees, agents, and any subcontractors have all licenses, permits, qualifications, and approvals of whatsoever nature that are legally required to practice their respective professions. Contractor represents and warrants to City that Contractor and its employees, agents, any subcontractors shall, at their sole cost and expense, keep in effect at all times during the term of this Agreement any licenses, permits, and approvals that are legally required to practice their respective professions. In addition to the foregoing, Contractor and any subcontractors shall obtain and maintain during the term of this Agreement valid Business Licenses from City.

**7.5 Nondiscrimination and Equal Opportunity.** Contractor shall not discriminate, on the basis of a person’s race, religion, color, national origin, age, physical or mental handicap or disability, medical condition, marital status, sex, or sexual orientation, against any employee, applicant for employment, subcontractor, bidder for a subcontract, or participant in, recipient of, or applicant for any services or programs provided by Contractor under this Agreement. Contractor shall comply with all applicable federal, state, and local laws, policies, rules, and requirements related to equal opportunity and nondiscrimination in employment, contracting, and the provision of any services that are the subject of this Agreement, including but not limited to the satisfaction of any positive obligations required of Contractor thereby.

Contractor shall include the provisions of this Subsection in any subcontract approved by the Contract Administrator or this Agreement.

**Section 8. TERMINATION AND MODIFICATION.**

**8.1 Termination.** City may cancel this Agreement at any time and without cause upon written notification to Contractor.

Contractor may cancel this Agreement upon  30  days’ written notice to City and shall include in such notice the reasons for cancellation.

In the event of termination, Contractor shall be entitled to compensation for services performed to the effective date of termination; City, however, may condition payment of such compensation upon Contractor delivering to City any or all documents, photographs, computer software, video and audio tapes, and other materials provided to Contractor or prepared by or for Contractor or the City in connection with this Agreement.

**8.2 Extension.** City may, in its sole and exclusive discretion, extend the end date of this Agreement beyond that provided for in Subsection 1.1. Any such extension shall require a written amendment to this Agreement, as provided for herein. Contractor understands and

agrees that, if City grants such an extension, City shall have no obligation to provide Contractor with compensation beyond the maximum amount provided for in this Agreement. Similarly, unless authorized by the Contract Administrator, City shall have no obligation to reimburse Contractor for any otherwise reimbursable expenses incurred during the extension period.

**8.3 Amendments.** The Parties may amend this Agreement only by a writing signed by all the Parties.

**8.4 Assignment and Subcontracting.** City and Contractor recognize and agree that this Agreement contemplates personal performance by Contractor and is based upon a determination of Contractor's unique personal competence, experience, and specialized personal knowledge. Moreover, a substantial inducement to City for entering into this Agreement was and is the professional reputation and competence of Contractor. Contractor may not assign this Agreement or any interest therein without the prior written approval of the Contract Administrator. Contractor shall not subcontract any portion of the performance contemplated and provided for herein, other than to the subcontractors noted in the proposal, without prior written approval of the Contract Administrator.

**8.5 Survival.** All obligations arising prior to the termination of this Agreement and all provisions of this Agreement allocating liability between City and Contractor shall survive the termination of this Agreement.

**8.6 Options upon Breach by Contractor.** If Contractor materially breaches any of the terms of this Agreement, City's remedies shall include, but not be limited to, the following:

**8.6.1** Immediately terminate the Agreement;

**8.6.2** Retain the plans, specifications, drawings, reports, design documents, and any other work product prepared by Contractor pursuant to this Agreement;

**8.6.3** Retain a different contractor to complete the work described in Exhibit A not finished by Contractor; or

**8.6.4** Charge Contractor the difference between the cost to complete the work described in Exhibit A that is unfinished at the time of breach and the amount that City would have paid Contractor pursuant to Section 2 if Contractor had completed the work.

**Section 9. KEEPING AND STATUS OF RECORDS.**

**9.1 Records Created as Part of Contractor's Performance.** All reports, data, maps, models, charts, studies, surveys, photographs, memoranda, plans, studies, specifications, records, files, or any other documents or materials, in electronic or any other form, that Contractor prepares or obtains pursuant to this Agreement and that relate to the matters covered hereunder shall be the property of the City. Contractor hereby agrees to deliver those documents to the City upon termination of the Agreement. It is understood and

agreed that the documents and other materials, including but not limited to those described above, prepared pursuant to this Agreement are prepared specifically for the City and are not necessarily suitable for any future or other use. City and Contractor agree that, until final approval by City, all data, plans, specifications, reports and other documents are confidential and will not be released to third parties without prior written consent of both Parties.

- 9.2 Contractor's Books and Records.** Contractor shall maintain any and all ledgers, books of account, invoices, vouchers, canceled checks, and other records or documents evidencing or relating to charges for services or expenditures and disbursements charged to the City under this Agreement for a minimum of 3 years, or for any longer period required by law, from the date of final payment to the Contractor to this Agreement.
- 9.3 Inspection and Audit of Records.** Any records or documents that Subsection 9.2 of this Agreement requires Contractor to maintain shall be made available for inspection, audit, and/or copying at any time during regular business hours, upon oral or written request of the City. Under California Government Code Section 8546.7, if the amount of public funds expended under this Agreement exceeds \$10,000.00, the Agreement shall be subject to the examination and audit of the State Auditor, at the request of City or as part of any audit of the City, for a period of 3 years after final payment under the Agreement.

**Section 10. MISCELLANEOUS PROVISIONS.**

- 10.1 Attorneys' Fees.** If a party to this Agreement brings any action, including an action for declaratory relief, to enforce or interpret the provision of this Agreement, the prevailing party shall be entitled to reasonable attorneys' fees in addition to any other relief to which that party may be entitled. The court may set such fees in the same action or in a separate action brought for that purpose.
- 10.2 Venue.** In the event that either party brings any action against the other under this Agreement, the Parties agree that trial of such action shall be vested exclusively in the state courts of California in the County of Alameda or in the United States District Court for the Northern District of California.
- 10.3 Severability.** If a court of competent jurisdiction finds or rules that any provision of this Agreement is invalid, void, or unenforceable, the provisions of this Agreement not so adjudged shall remain in full force and effect. The invalidity in whole or in part of any provision of this Agreement shall not void or affect the validity of any other provision of this Agreement.
- 10.4 No Implied Waiver of Breach.** The waiver of any breach of a specific provision of this Agreement does not constitute a waiver of any other breach of that term or any other term of this Agreement.
- 10.5 Successors and Assigns.** The provisions of this Agreement shall inure to the benefit of and shall apply to and bind the successors and assigns of the Parties.

**10.6 Conflict of Interest.** Contractor may serve other clients, but none whose activities within the corporate limits of City or whose business, regardless of location, would place Contractor in a "conflict of interest," as that term is defined in the Political Reform Act, codified at California Government Code Section 81000 *et seq.*

Contractor shall not employ any City official in the work performed pursuant to this Agreement. No officer or employee of City shall have any financial interest in this Agreement that would violate California Government Code Section 1090 *et seq.*

Contractor hereby warrants that it is not now, nor has it been in the previous 12 months, an employee, agent, appointee, or official of the City. If Contractor was an employee, agent, appointee, or official of the City in the previous 12 months, Contractor warrants that it did not participate in any manner in the forming of this Agreement. Contractor understands that, if this Agreement is made in violation of California Government Code Section 1090 *et seq.*, the entire Agreement is void and Contractor will not be entitled to any compensation for services performed pursuant to this Agreement, including reimbursement of expenses, and Contractor will be required to reimburse the City for any sums paid to the Contractor. Contractor understands that, in addition to the foregoing, it may be subject to criminal prosecution for a violation of California Government Code Section 1090 *et seq.*, and, if applicable, will be disqualified from holding public office in the State of California.

**10.7 Solicitation.** Contractor agrees not to solicit business at any meeting, focus group, or interview related to this Agreement, either orally or through any written materials.

**10.8 Contract Administration.** This Agreement shall be administered by \_\_\_\_\_ ("Contract Administrator"). All correspondence shall be directed to or through the Contract Administrator or his or her designee.

**10.9 Notices.** Any written notice to Contractor shall be sent to:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Any written notice to City shall be sent to:  
Tony Batalla  
835 East 14<sup>th</sup> Street  
San Leandro, CA 94577

With a copy to:  
City of San Leandro  
Department of Finance  
c/o Purchasing Technician  
835 East 14<sup>th</sup> Street  
San Leandro, CA 94577



**10.10 Integration.** This Agreement, including the scope of work attached hereto and incorporated herein as Exhibits A, B, represents the entire and integrated agreement between City and Contractor and supersedes all prior negotiations, representations, or agreements, either written or oral.

Exhibit A            Scope of Services  
Exhibit B            Compensation Schedule & Reimbursable Expenses

**10.11 Counterparts.** This Agreement may be executed in multiple counterparts, each of which shall be an original and all of which together shall constitute one agreement.

**10.12 Certification per Iran Contracting Act of 2010.** In the event that this contract is for one million dollars (\$1,000,000.00) or more, by Contractor’s signature below Contractor certifies that Contractor, and any parent entities, subsidiaries, successors or subunits of Contractor are not identified on a list created pursuant to subdivision (b) of Section 2203 of the California Public Contract Code as a person engaging in investment activities in Iran as described in subdivision (a) of Section 2202.5, or as a person described in subdivision (b) of Section 2202.5 of the California Public Contract Code, as applicable.

**10.13 Cybersecurity Liability.** Contractor shall identify reasonably foreseeable internal and external risks to the privacy and security of personal information the Contractor has access to that could result in the unauthorized disclosure, misuse, alteration, destruction or other compromise of the information. Contractor shall regularly assess the sufficiency of any safeguards and information security awareness training in place to control reasonably foreseeable internal and external risks related to information under its control, and evaluate and adjust those safeguards in light of the assessment.

**SIGNATURES ON FOLLOWING PAGE**

The Parties have executed this Agreement as of the Effective Date. The persons whose signatures appear below certify that they are authorized to sign on behalf of the respective Party.

CITY OF SAN LEANDRO

[NAME OF CONTRACTOR]

\_\_\_\_\_  
Chris Zapata, City Manager

DocuSigned by:  
*Linda Short*  
D76FDD88A1024D8...  
\_\_\_\_\_  
[NAME, TITLE]

Attest:

40662  
\_\_\_\_\_  
Contractor's DIR Registration Number

\_\_\_\_\_  
Tamika Greenwood, City Clerk

Approved as to Fiscal Authority:

\_\_\_\_\_  
David Baum, Finance Director

\_\_\_\_\_  
Account Number

Approved as to Form:

\_\_\_\_\_  
Richard D. Pio Roda, City Attorney

1957063.2 (2015)

**EXHIBIT A**  
**SCOPE OF SERVICES**

**EXHIBIT B**

**COMPENSATION SCHEDULE & REIMBURSABLE EXPENSES**



# City of San Leandro

## Information Technology

Addendum to Request for Quote  
for  
**Accele Development**  
(Reports and Configuration Changes)

Proposal Submission:  
Thursday, June 30, 2016



21Tech CONFIDENTIAL



21Tech, LLC  
1330 Broadway, Suite 701  
Oakland, CA 94612  
415.355.9090

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The data contained herein shall not be disclosed, duplicated, or used in whole or in part for any purpose other than to evaluate the proposal, provided that if a contract is awarded to this offer as a result of, or in connection with, the submission of these data, the proposee shall have the right to duplicate, use or disclose the data to the extent provided in the agreement. This restriction shall not limit the right to use information contained in the data if it is obtained from another source without restriction.

This proposal is confidential and the exclusive property of 21Tech, LLC. This document may not be copied, printed, or otherwise shared. You are prohibited from sharing, copying, or otherwise using or disclosing its contents.

June 30<sup>th</sup>, 2016

City of San Leandro  
Information Technology  
835 East 14<sup>th</sup> Street  
San Leandro, CA 94577  
Attn: Tony Batalla

Dear Mr. Batalla,

Please find enclosed our proposal to you regarding the Addendum to Request for Quote regarding Accela Development for San Leandro's Information Technology department. Our team is honored to be part of your consideration.

We believe an effective partner has to provide expertise in four areas:

- Experience in Municipal Public Sector implementations in general
- Proven Accela-specific experience
- Ability to troubleshoot, problem solve and resolve issues
- Provide exceptional customer service through ongoing communication

21Tech retains highly qualified staff and subject matter experts. We believe that our solution-centric approach to problem solving is a winning one, and a methodology that separates us from many providers.

As a partner with San Leandro's IT department, we look forward to earning your support, trust and respect by providing you with excellent customer services and creative solutions at competitive prices.

If you have any questions, or would like additional information on 21Tech, please contact me:

Phone: (415) 355-9090

Fax: (888) 715-0285

Email: [michael.young@21tech.com](mailto:michael.young@21tech.com)

Web: [www.21Tech.com](http://www.21Tech.com)

Sincerely,

**Michael Young**

**Michael Young**

Senior Technical Manager, 21Tech, LLC



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## INTRODUCTION

Vendor Name:	21Tech
Vendor Address:	1330 Broadway, Suite 701, Oakland, CA 94612
Vendor Contact Name:	Michael Young
Vendor Contact Phone Number:	415.355.9090
Vendor Contact Email Address:	Michael.Young@21tech.com
Date of Proposal Submitted to the City	06-30-2016

### WHY 21TECH?

21Tech has the pedigree to meet the needs of San Leandro’s Information Technology department with our:

- Unmatched experience with core specialties
- Local presence
- Our understanding of Government
- Our Flexible Approach.

### UNMATCHED EXPERIENCE WITH CORE SPECIALTIES

21Tech has successfully worked on hundreds of municipal projects that range from simple implementations to complex, multi-platform, multi-tenant solutions.

21Tech specializes in Accela solutions for municipal public sector clients. We understand user interface, back-end integration, and reporting needs that are unique to municipal departments. Our staff includes architects, analysts, developers and project managers who are well versed in every part of Accela including but not limited to the following:

#### Skill Sets

- Accela (AA,AMO,AGIS,ACA,APPS)
- GIS
- Report Development
- App Development
- Java Script
- Java
- HTML,VB
- C#, VB.Net
- SSRS, SQL
- Crystal

#### Software

- Accela (All versions 6.5 – 8.0)
- ESRI, ArcGIS
- Database: Oracle 7.2, 9i, 10g, 11i, Microsoft SQL Server (2005-2012)
- Platforms: Microsoft Windows® 95, 98, 2000, XP, VISTA, 7, 8, Sever 2008, Server 2012

Given that this is our strength, we feel confident in providing you with a strong development service combined with experience and leadership you can trust.

## WE HAVE A LOCAL PRESENCE

21Tech has successfully implemented at least fifteen software systems within the Bay Area over the last ten years. With this experience comes an understanding of cross-departmental integrations, custom development, data migration, local municipality business and municipal rules and regulations. We have built a strong track record by understanding the importance of partnering with city departments. Projects require a strong partnership that is built, executed and relied upon throughout the implementation cycle. With 21 Tech’s management so close in proximity, we are invested in the success of the Bay Area community. Should an issue ever arise, it is nice to know you can always sit down and have a face to face with your 21Tech partners.

21Tech’s Accela local experiences include:

- City of San Francisco Department of Building Inspections, AA ACA AGIS Implementation
- City of San Francisco Department of Building Inspections, EDMS/ Accela Integration Project
- City of San Francisco Planning, AA ACA AGIS Implementation
- City of San Francisco Planning, EDMS, Accela Integration Project
- City of Oakland, Accela Reports Integration Project
- Accela Headquarters – assist with development work

We feel confident in our Accela team’s ability to develop solutions that will meet the needs of the San Leandro’s Information Technology department.

## WE UNDERSTAND GOVERNMENT

A municipal government has requirements and unique issues that differ from the private sector. 21Tech acknowledges this and has experience where private sector services companies may underestimate the differences. In our many years of working with municipalities we understand how to work with Subject Matter Experts from other departments to coordinate access to backend proprietary systems. It is our belief that success is in the details, and that with our municipal experience we have those details well in hand.

21Tech specializes in government services. Our three major verticals are Land Management, Asset Management, and Taxation – all of which are in government. We understand the nuances of working with government departments, and the level of involvement needed.

## OUR FLEXIBLE APPROACH

We like to approach solutions holistically – looking at the best options for the customer, not just for this solution, but possibly creating an environment or building blocks for applications that can be added to or interacted with years from now. This is why we offer the “health assessment” to our partners so you can move forward with the confidence and assurance that all your needs are being addressed not just the ones on the surface.

## ABOUT 21TECH

Established in 1996, 21Tech brings more than 18 years of experience as a systems integrator implementing Commercial Off the Shelf (COTS) software packages like Accela. Our experience also includes software application development, business intelligence and data warehouse implementations, customer relationship management (CRM), enterprise asset management (EAM), telecommunications, workflow and project management.

Our extensive industry experience includes working with public sector clients such as the City and County of San Francisco, the State of California, the cities of Indianapolis, Chicago, Portland, and Las Vegas. Our experience with the private sector includes companies such as AT&T, Accela, Avaya, Infor, Microsoft, Oracle, Unisys, IBM Global Services, Franklin Templeton, Thompson Reuters, and Charles Schwab.

Municipalities and state agencies create a substantial percentage of our business because 21Tech adeptly addresses unique challenges in providing COTS implementations, strategy services, and general IT professional services. Regardless of the project, our goal is simple: the end result is easy to use, easy to expand and efficient for our client. We pride ourselves in our accessibility to our clients, and our ability to gain and maintain their trust. We truly understand that all projects have challenges. How we deal with such challenges and work with our clients to a successful resolution sets us apart from our competitors.

21Tech has developed a close working relationship with Accela starting in 2006. We are a Certified Accela Reseller and Implementation Partner. We have worked on several projects with them over these past eight years, and have developed a deep understanding of the many Accela Automation modules.

Our project experience includes implementations of the following:

- Program/Project Management
- Permitting Solutions
- Land Management Applications
- Asset Management Solutions
- Taxation and Revenue Solutions
- Data Warehouse and Dashboarding
- Business Licensing
- Vendor Management
- GIS Services and Solutions
- Workflow Management System
- Customer Service and CRM Applications
- Web Services
- Data Conversion
- Infrastructure and Facility Services
- Custom Application Development
- SharePoint/AD
- Enterprise Content Management
- System Conversion/ Upgrade

## Accela Permitting, Licensing, Building and Planning Expertise

21Tech provides business analysis, data migration, reporting, configuration and interface services for the Accela permitting and licensing software solutions to support Building, Planning and other city and state departments. The needs of the client involve complex legislature, business rules and parallel path workflow regarding planning and zoning, obtaining building permits, processing and recording building inspections, as well as recording complaints and property liens. These software

solutions are therefore highly configurable to the customized needs for each client and interfaces with other city department's solutions are required. As such, strong implementation strategies and project management are a requirement for successful implementations.

### Summary

We seek to offer the best user experience possible within Accela, so we focus on the details when it comes to form portlet design and the presentation of lists. Our staff is well versed in leveraging data filters and writing QuickQueries to ensure that the appropriate users are able to interact with the appropriate records, and have an aesthetically pleasing experience while performing data entry and querying the system.

We place a high value in the integrity of an Accela system. Our staff works exhaustively with our clients to make sure that user groups have the proper security settings, which are often controlled by Function Identifiers (FIDs) and sometimes through Standard Choices. When implementing Accela, we consider how functionality should be made available at different hierarchies, such as by user, user group, module, and/or agency-wide.

Thanks to our depth of working knowledge pertaining to Accela, we are proficient and have experience configuring some of what might be classified as the "deep" features within the platform. These include useful but often overlooked functionality, such as the asset management module, Smart Charts, time accounting, structures and establishments, ASI drill-downs, and sets.

### Experience with Accela Modules

- Accela Automation: Land Management
- Accela Automation: Asset Management
- Accela Automation: Service Requests
- Accela Citizen Access
- Accela GIS
- Accela Mobile Office
- Accela Inspector App (iOS and Android)
- Accela Code Officer App (iOS)
- Accela Work Crew App (iOS)
- Accela Analytics App (iOS)

### Conferences and Meetings Attended

- Accela Engage 2015 (Los Angeles, CA)
- Accela Engage 2014 (San Diego, CA)
- Accela Engage 2013 (San Diego, CA)
- Accela User Conference 2012 (San Diego, CA)
- Accela User Conference 2011 (San Diego, CA)
- Accela User Conference 2010 (Anaheim, CA)
- Accela Regional User Group Meetings (Various / Online: 2012-Present)
- Accela Asset Management User Group (Fort Worth, TX: Feb 2014)

### Accela-Related Presentations

- Inspection Scheduling Across the Accela Platform (Presented at Accela Engage 2015)
- (Class) Batch Scripting 101 (Presented at Accela Engage 2015)
- Managing a Self-Hosted Environment (Presented at Accela Engage 2014)
- How to Keep Up with the Upgrades (Presented at Accela Engage 2013)
- XAPO Marks the Spot: Leveraging Your GIS to Open Up the Power of Accela Automation (Presented at Accela Engage 2013)
- Tips and Tricks to Managing a Highly Scripted Environment (Presented at Accela Engage 2012)
- Diagnosing Accela Issues (How to) (Presented at Accela Engage 2011)

## 1. OUR TEAM

---

### 21TECH TEAM

#### 21Tech Development

21Tech Team:	Business Analysis	Config.	Scripting	Reporting	GIS	Technical Architecture	Data Migrations	Gov. Sector	Training
1. Michael Young	✓	✓	✓	✓	✓	✓	✓	✓	✓
2. Leah Fortune	✓	✓	✓	✓	✓	✓	✓	✓	✓
3. William Flynn	✓	✓	✓	✓	✓	✓	✓	✓	✓
4. Weldon Crabb	✓	✓		✓				✓	✓

### STAFF EXPERIENCE AND RESUMES



**MICHAEL YOUNG**, Sr. Technical Manager

21Tech Team:	Business Analysis	Config.	Scripting	Reporting	GIS	Technical Architecture	Data Migrations	Gov. Sector	Training
Michael Young	✓	✓	✓	✓	✓	✓	✓	✓	✓

Michael Young is a member of 21Tech’s professional services team, and has over 17 years of experience in the information technology field. In addition to managing several IT organizations, he has very extensive knowledge in Accela. Mr. Young has spent the last 10 years as a public sector consultant focused on Accela implementation for city, county, and state governments. Michael is the Senior Technical Manager for 21 Tech’s Accela team. Prior to joining 21tech Mr. Young was Systems Manager managing an Accela team for a major metropolitan city. Michael has presented at the Accela national conference for the last 6 years. Most recently co-teaching a batch scripting class at the 2015 Accela Engage Conference. He has a wide range of experience in Accela implementation including, AA, ACA, AMO and AGIS. He has also earned his Six Sigma yellow belt developing a Six Sigma Accela Upgrade Process. He is also a .net developer and has developed several interfaces for various Accela integrations components.

Recent projects include:

- ◆ Mr. Young provided the Department of Planning with technical consulting services pertaining to the selection, implementation and integration of an Accela EDMS solution and document management suite for a combined City/County on the West Coast. Responsible for documenting business processes, advising clients and colleagues about software best practices, and developing a decision matrix for product selection. Mr. Young assured the integration could be completed with Automation, Citizen Access, and AccelaGIS. He identified and addressed budgeting and contract issues with selected products, provided an interface template for integration with Automation and facilitated user acceptance testing and training on product selection.
- ◆ Mr. Young provided a large city county government with technical consulting services for the implementation of Accela Master Script 3.0 upgrade. The custom nature of the specific agency’s integration required a great deal of knowledge of Accela scripting. Mr. Young was able to customize and integrate a complete solution that allowed for seamless integration and operation. He was also able to develop, implement and integrated VSN server solution to allow for a complete versioning system for the entire agency.
- ◆ Mr. Young managed an integration for a major metropolitan city’s development effort when the sewer system was sold to a private company. He led an Accela development team to divide a previously integrated Accela system into multiple modules. During this project he was able to successfully architect and develop a solution that had been previously thought of as impossible before. The solution allowed the individual modules to use Multiple EDMS Solution

21Tech Response:



based on record types. The documents could be stored in one or many locations. This innovative new type of interface allowed these agencies the ability to share resources while maintaining their separate status.

- ◆ Mr. Young managed a team to evaluate and develop a new and improved way to deploy upgrades to the Accela System. This process allowed for Six Sigma processes to be incorporated to the Accela upgrade process. The newly developed upgrade process provided the agency with a significantly more efficient process, less down time, and less overall cost for the agency during and after the upgrade.
- ◆ Mr. Young was project manager during the Implementation of Accela Licensing into a city/county government agency. He was responsible for collecting user requirements, developing project work plans, developing and monitoring project schedules, assessing and mitigating risks, procuring resources, managing project teams, developing performance metrics for project milestones, developing reports, reporting on project progress, and documenting lessons learned. He also provided technical training and mentoring to staff.
- ◆ Mr. Young was the chief technical resource for the Accela Implementation for a city/county IT Department responsible for maintaining and providing all Accela services to its client. Mr. Young served as the subject matter expert on a long term engagement providing a variety of services. His responsibilities included extensive configuration of; Automation, Citizens Access, Mobile Office, App Development, Interface development, Script writing (EMSE, Batch, and Master), Expression development, developing best practices, report development, GIS updates. The agency also required the development of an integrated change control system to keep track of all changes in Accela. Mr. Young was also responsible for customer service of the agency's clients maintaining a perfect record and maintaining and exceeding every SLA.
- ◆ Mr. Young attended Purdue University where he majored in Computer Information Technology and Minored in Organizational Leadership. Mr. Young also has several certifications in the IT field including; FileNet Administration, Microsoft Certified SharePoint Developer, Altiris/Wise Repackaging, Organizational Leadership, and A+ Certifications.

## Michael C Young

Senior Technical Manager 

Michael has seventeen years of experience in Information Technology, balanced between private industry and the government sector. He has managed several IT organizations starting with his own company in the late 1990s. In 2003, Michael moved into a Director of IT role for a world-wide manufacturing company. After several years, he moved to a government consulting role with Daniels Associates Inc. He was in that role for the last ten years. In that role he has managed the Accela system for the City of Indianapolis since 2008 as their systems manager.

Michael has presented at the Annual Accela Engage Conference in 2010, 2011, 2012, 2013 and 2014 (Michael co-taught a breakout session in 2015 on Batch Scripting). He has presented on several topics including: Managing a Self-Hosted Environment; How to Upgrade Accela; and Best Practices of Script Writing.

*Specializations:* Systems Integration; Project Management; Writing Interfaces; Giving Presentations, Team Management; Records Management; License Management;

*Industries:* Government (Local and State); Utilities (Water, Wastewater, Gas); Transportation; Public Works; Land Records; Water Resources

### Accela Implementation Experience

- 6+ years of experience administering and consulting with the Accela system (AA, ACA, AMO, AGIS, Apps)
- 5+ years of experience in report writing against Accela's data model using Crystal Reports 2008 and SSRS 2008
- 6+ years developing interfaces using govxml
- 17+ years managing implementation teams for various software integrations
- Requirements gathering and business analysis
- Specifications gathering for configuration and reports
- Writing custom functions, expressions, and event scripting
- Applications: Permitting, Planning; Code Enforcement; Inspections; Licensing; Work Orders; Service Requests
- Administration of self-hosted environments
- User Training (AA, ACA, AMO, AccelaGIS, Apps)
- 6 Years Attending and Presenting at Accela National Conferences; User Group; Frequent contributor to Accela Community

### TECHNICAL EXPERTISE

**Accela Automation (All versions from 6.7 to 7.33) :** AA, AMO, ACA, AGIS, Gateway, Self-Hosting, Record Type Configuration; Workflow Design; Fee Schedule Implementation; ASI/ASIT Design; Form Portlet Design; Security; Calendaring / Inspection Scheduling; Conditions; Master and Custom Scripting using (version. 1.4 - 3.0); Batch Scripting; Multiple Types of Interfaces (Payment Interfaces, EDMS Interfaces, and other govxml based Interfaces)

**Productivity Software:** Word, Excel, PowerPoint, Access, Publisher, Outlook, Visio

**Scripting / Languages:** JavaScript, VisualBasic.NET, C#, SQL, Ideal, Cobal.

**Database:** SQL Server

**Reporting Applications:** SSRS 2008 R2, Crystal Reports 2008

**Content Management System:** Microsoft SharePoint

**Project Management:** Microsoft Project 2007

### PROFESSIONAL EXPERIENCE

Senior Technical Manager Oct 2015  
21Tech, San Francisco, CA to Present

Accela Systems Manager July 2005  
Daniels Associates Inc. / City of Indianapolis, IN to Oct 2015

Director of Information Technology Feb 2003  
Stratis Corporation, Indianapolis, IN to July 2005

Owner / Software Architect Dec 1998  
Young Consulting, Indianapolis, IN to Feb 2003

### EDUCATION

Computer Information Technology Major  
Organizational Leadership Minor  
Purdue University, 1997 - 2005

AAS, Computer Information Technology  
Purdue University, 2004

### CERTIFICATIONS

FileNet Administration Certification  
FileNet / July, 2009

SharePoint Developer Certification  
Microsoft / May, 2009

Altiris / Wise Repackaging Certification  
Wise Certification / February, 2007

Organizational Leadership Certification  
Purdue University / May, 2004

Information Technology Certification  
Purdue University / December, 2002

A+ Certification  
Purdue University / May, 2000



**LEAH FORTUNE**, Accela Content Manager

21Tech Team:	Business Analysis	Config.	Scripting	Reporting	GIS	Technical Architecture	Data Migrations	Gov. Sector	Training
Leah Fortune	✓	✓	✓	✓	✓	✓	✓	✓	✓

Leah Fortune is a member of 21Tech’s professional services team, and has over 5 years of experience in Accela consulting, project management, change control integration, report writing, and quality assurance. Ms. Fortune has extensive experience with permitting and licensing systems at various levels of government in the public sector, and is a Lead Analyst on 21Tech’s Accela team. Ms. Fortune is also responsible for closely working with clients and partners to ensure strong results through proper expectations and guidance. Prior to joining 21Tech, Ms. Fortune spent three years administering and configuring two separate full-scale Accela implementations for state agencies.

Recent projects include:

- ◆ Ms. Fortune provided departments of building inspection and planning with technical consulting services pertaining to the implementation of its Accela land management suite for a combined city/county on the West Coast. Responsible for documenting business processes, advising clients about Accela best practices, performing extensive configuration within Automation, Citizen Access, and writing scripts automating routine to complex actions based on analysis of client-provided logic, developing Crystal reports, facilitating user acceptance testing and training sessions, developing user guides and reference materials, and documenting lessons learned.
- ◆ Ms. Fortune served as a Subject Matter Expert for Accela Citizen Access Implementation of Health Care and Professional Licensing for a state agency. Responsible for developing project plans, tracking project progress, engaging stakeholders, reviewing deliverables from consultants, training and practicing regular knowledge transfer with professional staff of nine programmers and support staff. Evaluated change requests for Accela Automation configuration, scripting, and reporting needs, providing business need analysis and solution options, creating work plan and user testing plan documents, estimating delivery date, and executing the plan.
- ◆ Ms. Fortune was key in developing and implementing a Change Control Process between client and their internal IT staff for a state agency. Responsible for streamlining operations and business process reengineering using data and interview driven analysis, and reducing waste based on IT usage and policy. Developed Business Intelligence for IT assignment tracking.
- ◆ Ms. Fortune administered and configured a comprehensive self-hosted Accela implementation for a state agency, including Land Management, Licensing, AccelaGIS, Accela Mobile Office, and Accela Citizen Access. Responsible for overseeing full design of record types and inspections, configuration (i.e., FIDs, Standard Choices, event-driven customization (expressions, scripts, and custom functions), workflows, data validation, establishing interfaces to GIS and payment systems, report writing, and user training. Developed Business Intelligence to comply with Public Information Act.
- ◆ Ms. Fortune served in the capacity of Data Management project manager during archival and conversion of statewide boiler program records for a state agency. Responsible for developing project work plans, identifying and consulting with stakeholders, collecting user requirements, developing and monitoring

21Tech Response:



project schedules, procuring resources, managing project teams, assessing and mitigating risks, performing quality control, developing performance metrics for project milestones, reporting on project progress, and documenting lessons learned. Provided technical training and mentoring to staff of six professionals. Daily work involved extensive quality assurance / quality control and data analysis.

- ◆ Ms. Fortune received Bachelor of Arts (B.A.) emphasizing research and communications from Carroll College, Helena, Montana.
- ◆ Ms. Fortune is a certified Project Management Professional (PMP).

## Leah Fortune, PMP

Accela Content Manager 

Ms. Fortune has 15 years of experience in Content Management, balanced between public and private sector positions. The past six years, she has worked exclusively with the Accela Enterprise Solution, working with small teams to implement multi-faceted solutions for jurisdictions of over one million public users. Ms. Fortune is an expert at using business process analysis, design, and redesign to help clients understand their organizational needs, and determining how those goals are best translated into enterprise software via configuration, customization and integration approaches. She manages overall content to ensure the use of repeatable processes and general efficiency.

Leah's experience includes documenting business processes, advising clients about best practices, performing extensive configuration within Automation, Citizen Access, and writing scripts automating routine to complex actions based on analysis of client-provided logic, developing Crystal reports, facilitating user acceptance testing & training sessions, developing user guides & documenting lessons learned. She is also responsible for managing client expectations and sign-off, and supporting and nurturing client/user buy-in.

**Specializations:** Systems Integration; Project Management; SSRS Reports; Crystal Reports; System Configuration, Accela Database Model; Team Management; Records Management; Content Management; Risk Management

**Industries:** Government (Local and State); Land Management; Professional Licensing; Health Care Licensing; Public Works; Fire Department; Utilities (Water, Wastewater)

### Accela Implementation Experience

- 5 years of experience implementing and administering
  - Accela Platform (AA, ACA, AMO, and Inspector App)
  - 5 years of report development against Accela's Database Model using SSRS 2008 & Crystal Reports 2008
  - Requirements gathering and business analysis
  - Specifications for configuration, scripting, and reports
  - User Training (AA, ACA, AMO, Accela Inspector App)
  - Implementing Content Management Strategy to support data migration & reporting
  - Managing Change Control and Content to mitigate risks
  - Ensuring all content is consistent in terms of style, quality and tone of voice, and optimized for search and user experience for all channels of content including Accela Citizen's Access
  - Creating reusable processes for system efficiency
  - Recognized at the 2012 Accela User Conference for the largest full-scale Citizen Access implementation
- **Land Management, Licensing, and Custom Configuration:**
- Workflow Elements and Automation
  - Application Specific Information/Custom Fields
  - Specialized Fee Formulas and Fee Automation
  - Inspection Elements & Calendaring
  - Event-Based Automation
  - Expiration/Renewal Processes
  - Intake Forms and Portlet Designer

### TECHNICAL EXPERTISE

**Accela Automation:** AA, AMO, ACA, AGIS, Gateway, Self-Hosting, Record Type Configuration; Report Configuration; Workflow Design; Fee Schedule Implementation; Custom Fields and Lists Design; Form Portlet Design; Security; Calendaring / Inspection Scheduling; Conditions; Standard Choice Event-Based scripting

**Productivity Software:** Word, Excel, PowerPoint, Access, Publisher, Outlook, Project, SharePoint

**Computer/Programming Background:** **Management System:** Accela Automation, Accela 360, SQL, JavaScript, Microsoft SQL Server Management Studio, Microsoft Business Intelligence Development Studio, Ralleo, Crystal Reports 2008

### PROFESSIONAL EXPERIENCE

Senior Business Analyst 21Tech, San Francisco, CA	2013 to Present
Accela Systems Programmer State of Montana	2010-2013

### CERTIFICATIONS

PMP Certification  
Project Management Institute, 2015

### EDUCATION

B.A., English and History  
Carroll College, 2004

**WILLIAM FLYNN**, Accela Solutions Architect

21Tech Team:	Business Analysis	Config.	Scripting	Reporting	GIS	Technical Architecture	Data Migrations	Gov. Sector	Training
William Flynn	✓	✓	✓	✓	✓	✓	✓	✓	✓

William Flynn, Ph.D is currently a member of 21Tech’s professional services team, and has over 16 years of experience in technical consulting, IT/GIS management, project management, systems integration, audits, and quality assurance. Dr. Flynn has extensive experience with permitting and licensing systems at various levels of government in the public sector, and Is the Lead Architect of 21Tech’s Accela Team. Prior to joining 21Tech, Dr. Flynn spent three years administering and configuring a comprehensive Accela implementation for a municipality in Texas. Dr. Flynn is an active member within the Accela user community, presenting regularly at Accela’s national and regional meetings, having previously served as an officer for multiple regional and product user groups, and continually offers technical solutions and advice on best practices to other users on the Accela Community Forum. He has also been certified by Accela in Scripting 3.0 and recognized as an Accela Implementation Professional (Bronze).

Recent projects include:

- ◆ Dr. Flynn provided departments of building inspection and planning with technical consulting services pertaining to the implementation of its Accela land management suite for a combined City/County on the West Coast. Responsible for documenting business processes, advising clients and colleagues about software best practices, performing extensive configuration within Automation, Citizen Access, and AccelaGIS, writing scripts and custom functions, mapping fields for data conversion, writing reports, facilitating user acceptance testing and training sessions, performing system troubleshooting, developing project plans, and documenting lessons learned. Scripted against a contractor state license board Web service to validate appropriate licenses were held by professionals prior to permit issuance.
- ◆ Dr. Flynn provided independent verification and validation (IV&V) services surrounding the implementation of an advanced metering infrastructure (AMI) deployment for a municipal water and electric utility in Texas. Responsible for quality assurance, audit and oversight of development and integration efforts (included a utility billing/customer information system, computerized maintenance management system, meter data management program, enterprise GIS, and several other metering applications and databases), reporting over project progress, calculating performance metrics, performing spatial analysis to assess the success rate of the mesh network architecture of collectors and nodes and identify suitable locations for additional collectors, review of system hardware and software/database configurations, and documenting findings, anomalies, and recommendations for process improvement.
- ◆ Dr. Flynn single-handedly administered and configured a comprehensive self-hosted Accela implementation for a municipality in Texas, including Land Management, Licensing, Asset Management, AccelaGIS, Accela Mobile Office, Inspector app, Code Officer App, and Accela Citizen Access. Responsible for full design of record types and inspections, configuration (i.e., FIDs, Standard Choices, event-driven customization (expressions, scripts, and custom functions), workflows, data

21Tech Response:



validation, establishing interfaces to GIS and payment systems, report writing, and user training. Specific examples of licensing established within Accela included food establishments, drinking establishments, catering services, mobile food trucks, pet licensing, and a variety of professional contractors.

- ◆ Dr. Flynn served in the capacity of technology project manager for a municipal public services department in Texas. Responsible for developing project work plans, identifying and consulting with stakeholders, collecting user requirements, developing and monitoring project schedules and budgets, procuring resources, managing project teams, assessing and mitigating risks, performing quality control, developing performance metrics for project milestones, reporting on project progress, and documenting lessons learned.
- ◆ Dr. Flynn oversaw the operation of a data management branch of a transportation planning and programming division for a state department of transportation. Responsible for supervising a group of eight technical and professional employees who collected, analyzed, and integrated large volumes of data on highways, bridges, and railroad crossings into inventory files and graphic geodatabases. Provided software and data collection training to district field staff, conducted highway performance monitoring system audits in the field, and certified the annual county road mileage to the state comptroller for disbursement of funds to the state's counties. Daily work involved extensive quality assurance / quality control and data analysis.
- ◆ Dr. Flynn served as GIS Manager for a large county in the Southwest, serving as the county's subject matter expert on GIS and geotechnology, and was the architect behind all mapping applications used across the County. Coordinated GIS development with other county departments and outside agencies. Integrated enterprise GIS with other county systems, including Accela PermitsPlus for the development services one-stop shop, as well as public works' work order / asset management system and the assessor's CAMA system.
- ◆ Dr. Flynn served as an internal project manager for its surface water quality division for a state environmental agency. Responsible for developing project plans, tracking project progress, engaging stakeholders, reviewing deliverables from consultants, giving presentations, and performing spatial analysis and hydrologic modeling. Also served on the board of directors for two different GIS steering committees.

Dr. Flynn received a Ph.D. in geography from Oklahoma State University, a Master of Applied Geography (M.A.G.) in GIS and cartography from Texas State University, and a Bachelor of Music (B.M.) in classical guitar performance from California State University, Fullerton. He also holds the certifications of Project Management Professional (PMP), Certified Scrum Master (CSM), and Geographic Information Systems Professional (GISP).



## William Flynn, PhD, PMP, CSM, GISP

William has sixteen years of experience in GIS and Information Technology, balanced between academia and the applied realm. He has served in several levels of government, including state, county, and most recently, municipal. William has applied GIS experience ranging from land records to utilities and surface water modeling to redistricting. He has also taught GIS to high school, community college, and university students over the past decade. Through his GIS roles with various local government agencies, William also came to administer numerous land and asset management systems, while achieving tight integration with enterprise GIS. He is a Project Management Professional (PMP) and Certified GIS Professional (GISP). In Fall 2014, William completed a Ph.D. in Geography at Oklahoma State University.

**Specializations:** GIS; Cartography; Project Management; Land & Asset Management Systems; Database Administration; Systems Integration; Report Writing; Spatial Analysis; Statistics; Quality Control Methods; Giving Presentations; Instruction; Technical Writing; Research  
**Industries:** Government (Local and State); Utilities (Water, Wastewater, Electric, and Gas); Transportation; Public Works; Land

### Accela Implementation Experience

4 years of experience administering and consulting with the Accela platform (AA, ACA, AMO, AGIS, Apps)  
 4 years of experience in report writing against Accela's data model using Crystal Reports 2008 and SSRS 2008  
 16+ years of GIS experience; Skilled with reciprocal integration between Accela and Esri, including External Address-Parcel-Owner (XAPO), GIS-based asset management, and mapping Accela data in ArcGIS.  
 Requirements gathering and business analysis  
 Specifications gathering for configuration and reports  
 Writing custom functions, expressions, and event scripting  
 Applications: Permitting, Planning; Code Enforcement; Inspections; Licensing; Work Orders; Service Requests  
 Administration of self-hosted environments  
 User Training (AA, ACA, AMO, AccelaGIS, Apps)  
 Attended/Presented at Accela National & Regional User Conferences; Regional Officer for Southwest Region (2012-13); Founding Member of Accela Asset Management User Group; Frequent contributor to Accela Community  
 Certified by Accela in Scripting 3.0  
 Certified by Accela as Implementation Professional (Bronze)

### TECHNICAL EXPERTISE

**Accela Automation 7.3.3.7:** AA, AMO, ACA, AccelaGIS, Inspector App, Code Officer App, Self-Hosting, Record Type Configuration; Workflow Design; Fee Schedule Implementation; ASI/ASIT Design; Form Portlet Design; Security; Calendaring / Inspection Scheduling; Conditions; Master/Custom Scripts; Batch Scripting; Third-Party Payment Interfaces; Accela Document Service (ADS); Time Accounting

**Other CMMS / Work Order Systems:** Maximo 7.5, Cartegraph 8, ManagerPlus Pro

**Productivity Software:** Word, Excel, PowerPoint, Access, Publisher, Outlook, Visio

**Scripting / Languages:** JavaScript, VisualBasic.NET, Python, C#, SQL

**Database:** SQL Server and Oracle

**Reporting Applications:** SSRS 2008 R2, Crystal Reports 2008, Cognos 8

**GIS Software:** ArcGIS Desktop 10.2, ArcGIS Server 10.2, ArcGIS Extensions (Spatial, Network, 3D, Geostatistical), Geocortex Essentials 4

**GPS: Handhelds:** Trimble GeoExplorer 6000XH, Trimble Juno 5B, Trimble Yuma / **Software:** Pathfinder Office, TerraSync, ArcPad

### PROFESSIONAL EXPERIENCE

Solutions Architect	Oct 2014
21Tech, San Francisco, CA	to Present
Senior IT Specialist / Accela Administrator	Apr 2012
City of New Braunfels, TX	to Oct 2014
Advanced Metering Infrastructure Consultant	Dec 2010
City of San Marcos, TX	to Oct 2014
Digital Data Support Branch Supervisor	Dec 2011
Texas Department of Transportation, Austin	to Apr 2012
GIS Manager	Dec 2010
Yuma County, AZ	to Nov 2011
GIS / Technology Project Manager	Mar 2009
City of San Marcos, TX	to Dec 2010
GIS Specialist III	Jan 2002
Texas Commission on Environmental Quality, Austin	to Dec 2004

### EDUCATION

Ph.D., Geography
Oklahoma State University, 2014
M.A.G., Master of Applied Geography
Texas State University, 2001
B.M., Bachelor of Music
California State University, Fullerton, 2000

### CERTIFICATIONS

PMP, Project Management Professional
Project Management Institute / March 2014 / License 1697778
CSM, Certified ScrumMaster
Scrum Alliance / March 2015 / License 000418129
GISP, Certified GIS Professional
GIS Certification Institute / August 2010 / License 00063947
ArcGIS Desktop Associate
Esri Technical Certification / July 2011

**WELDON CRABB**, Sr. Business Analyst

21Tech Team:	Business Analysis	Config.	Scripting	Reporting	GIS	Technical Architecture	Data Migrations	Gov. Sector	Training
Weldon Crabb	✓	✓		✓				✓	✓

Weldon Crabb is a member of 21Tech. Mr. Crabb has over 25 years of extensive systems knowledge from a programming prospective and a variety of accumulated business experiences to bridge the interface gap between Business and System requirements, bringing system architectural integrity perspective to any business solution. Mr. Crabb has been engaged for the past 7 years with permitting and licensing systems in the public sector. He has led Fit/Gap assessments, documented baseline Configuration requirements, performed configurations, managed reporting requirements and acted as led Subject Matter Expert (SME) during UAT cycles.

Recent projects include:

- ◆ For a large western municipal department, acted as led Business Analyst and provided quality assurance services in support of the Accela licensing and permitting product suite. Conducted As-is/ To-be requirement assessments, advised, documented, and baselined configuration requirements for 45+ case types, and implemented configurations. Also led report development through entire lifecycle, identifying and cataloging scope, report specifications, Development SME, UAT and implementation coordination.
- ◆ For a large western municipal Building Inspection department, stepped in as Business Analyst to reconcile problem case types and provided quality assurance services in support of the Accela licensing and permitting product suite. Also acted as Report Development SME, UAT and implementation coordination, and report specification clean-up.
- ◆ For a large western municipal Planning and Building Inspection departments, acted as Business Analyst and provided quality assurance services in support of the Accela licensing and permitting product suite. Supported report development through entire lifecycle, identifying and cataloging scope, report specifications, development SME, UAT and implementation coordination.
- ◆ For a large municipal Planning department, performed as-is analysis of the Accela planning, enforcement, and inspection vendor solution, which included reviewing client requirements and assessing them against vendor capabilities.
- ◆ Prepared Planning and Budget report for major western municipality, with in-depth analysis on optimum lease/ refurbishment rates against Gartner statistics, and Gold standard best practices.
- ◆ From project inception, was a team member as Sr. Business Analyst to implement a DataMart and Business Intelligence GUI to support City Statistics and KPI's for several departments and every division of DPW for a major mid-western municipality. Detailed requirements for extracts, transformation, and load API's were delivered. Worked closely with developers for quality assurance and adherence to requirements.
- ◆ Consolidated 5 legacy in-house systems for the Human Resource department of a major western city into a DataMart for Business Intelligence reporting and statistics. Led discovery process to ensure existing systems could support meaningful data points for city oversight and managerial support.

# Weldon Crabb

## Sr. Business Analyst

### PROFESSIONAL SKILLS

#### BUSINESS

Over 37 years of extensive systems knowledge from a programming prospective and a variety of accumulated business experience to bridge the interface gap between Business and System requirements. Bringing system architectural integrity perspective to any business solution. Requirements acquired through interviews, JAD, surveys and other appropriate methodologies. As author of system and business/system requirements have acted as lead throughout entire development life cycle as subject matter expert, engaged in development and implementation, use case creation and UAT support, attend to production implementation concerns, and act as front-end, back-end client liaison in realizing business goals through IT system solutions.

#### TECHNICAL

Requirements Software: MS Office Suite, Microsoft Project, Word, Excel, VISIO, PowerPoint.

Computer/Programming Background: Accela Automation, Accela 360, XML, SQL, FCIF, CICS, MDI, Access Server gateway, Intertest, Dialogue Manager (ISPF), Expediter (CICS & ISPF). CEDF, SDF, BMS/GT, VSAM; Abendaid, Fileaid, TBEDIT, Eztrieve, DYL-280, DLTO, Datavantage, MVS Utilities; MVS/XA, JCL. TSO/ISPF, Panvalet, Endeavor.

Languages: XML, SQL, FCIF, Pacific Bell Interpreter, Programmable Validation Scripts, COBOL II, RPG II, DL/I, Script/GML, CLIST

Hardware: IBM Mainframes, IBM PC, Apple Macintosh, IBM Series/1, and IBM System/34 Minicomputers.

Databases: Oracle SQL, Sybase, DB2/QMF, IMS/DB.

### EXPERIENCE

2007, Sep - Present/21Tech/San Francisco, CA

SR. BUSINESS ANALYST

- San Francisco – Accela Automation Implementation for Planning and Inspections departments
- City of Oakland – Accela Automation Reports
- Salt Lake City – Accela Automation, Permit Tracking
- Indianapolis – INDY Stat
- San Francisco – COIT Planning & Budget, TE Study, HRC BI, Proposals, Enterprise O365 rollout

2006, Apr-2007, Dec/ AT&T./San Ramon, CA

BUSINESS ANALYST CONSULTANT

2006, Feb - 2006, April/CSAA/San Francisco, CA

BUSINESS ANALYST CONSULTANT 2006, Jan - 2006, Feb/21Tech-SF CRM/San Francisco, CA

SYSTEMS ANALYST CONSULTANT

2003, July - 2005, May/SBC Internet Services/San Ramon, CA

SYSTEMS ANALYST CONSULTANT

2001, Feb-2002, Nov/SBC Work Flow Mngr. /San Ramon, CA

SYSTEMS ANALYST CONSULTANT

1998, Oct. - 2000, Oct./Telcordia/Piscataway, NJ

SYSTEMS ANALYST CONSULTANT

### SUMMARY

#### Experience

- 15 Years Business Analysis
  - BI Analysis
  - Surveys
  - JAD
  - UAT
  - Asset Management
  - Site Observations
  - Data/GAP Analysis
  - Vendor Evaluations

#### Accela Implementation Skills

- 5 Years AA Implementations:
  - As-is/To-be Requirements
  - Configuration Requirements
  - Configuration Build/ Implementation
  - Expression Builder
  - Report Specifications
  - Report Configurations
  - Training/ UAT Support
  - Vendor Evaluations

## 2. ACCELA DEVELOPMENT

### ISSUES, ERRORS, AND CHANGES

This section is a recap of the requested development. Associated to each request is a brief description of the area of focus based on documentation provided to us as of this date, our understanding of the system, and the estimated effort for those areas. The low estimate provided should encompass all of the known requirements as of this date (i.e., the “Known Scope”), but should additional items be uncovered during discovery it may require more effort and would thus increase the scope; hence, a high hour’s estimate is provided to address this.

#	TASK NAME	REQUIREMENT	TYPE	RESPONSE	(HRS) LOW	(HRS) HIGH
1.	Project Planning	Develop a project plan that will include all of the departments that use Accela. This plan should include a schedule for improvements and departments involved in each.	Project Management	Time will need to be planned with San Leandro IT department to review the developed plan, to confirm there are no interferences in the schedule.	40	60
2.	New Report Development	Develop requirements, build, test and implement several reports requested by San Leandro departments. (Engineering, Building, Planning, and Environmental).	New Reports	Work effort to develop new report includes business analysis, report specifications document with mock-up, development of Crystal report, load and configuration within Accela’s Report Manager, unit testing, and user acceptance testing. Our numbers were based on the standard reports time which is estimated at 32 hours.	220	280

21Tech Response:



#	TASK NAME	REQUIREMENT	TYPE	RESPONSE	(HRS) LOW	(HRS) HIGH
3.	Existing Report Modification	Work with staff to identify the working reports that need to be modified and changed to meet the needs of the specific departments	Fix Reports	Work effort to modify existing reports includes business analysis, mock-up, development of Crystal report, load and configuration within Accela's Report Manager, unit testing, and user acceptance testing. Our numbers were based on the average time to repair, modify and redeploy a report (8 hours).	30	50
4.	Credit Card Convince Fee	Provide a method to add a 3% fee to the total fee if a customer wants to pay by credit card. This will need to be implemented in all departments that take payment across all record types and fee schedules.	Custom Development	This task will involve a cross departmental effort that will affect fee schedules across the entire organization. We will need a SME from each department that is able to assist with specific requirements for the affected departments.	97	127
5.	GIS Integration	Provide Assistance to San Leandro IT Department in the implementation of APO GIS Integration into their current environment.	Implementation	This task will require San Leandro IT GIS Personnel to be involved and assist with task that require specific knowledge of the San Leandro GIS system.	60	100
6.	Additional Record Types	Work with staff to design and implement the new record types as needed in the individual departments to further streamline their business processes.	Configuration	Additional record types will need to be tested extensively by the Specific departments to insure it is working as expected prior to production deployment	20	40

21Tech Response:



#	TASK NAME	REQUIREMENT	TYPE	RESPONSE	(HRS) LOW	(HRS) HIGH
7.	Automation Scripting	Develop and Implement scripted automation task to allow a more user friendly experience, confirm accurate data is being captured and save time for staff.	Configuration	Additional scripting will need to be tested extensively by the Specific departments to insure it is working as expected prior to production deployment	60	100
8.	Workflow Modifications	Modifications of workflows that	Configuration	Workflow modifications needed can often impact other record types that duplicate work flow research will be needed to determine if all the modifications can be done to meet user needs	40	60
9.	User Training	Additional user training will be required to show staff how to use the newly implemented Accela features.	Training	Additional record types will need to be tested extensively by the Specific departments to insure it is working as expected prior to production deployment	40	80

21Tech Response:



## ASSUMPTIONS

1. San Leandro's IT department will provide required and appropriate resources including subject matter experts (SMEs) to communicate business rules and requirements to support the proposed timeline.
2. 21Tech will document the requirements per the communication from SMEs and will deliver all documented requirements for approval or feedback. San Leandro's IT department will review the Requirements Document and within three (3) Business Days of receipt will deliver either:
  - a. Indicates that San Leandro's IT department has signed-off and accepted the Requirements Document; or
  - b. Identifies the areas of concern and provide the required feedback for requirements document update.
  - c. Requirements review will not take more than two review cycles.
3. San Leandro's IT department will provide required resources to support all tasks in the above timeline for environment setup, User Acceptance Testing and training.
4. All application development, test case creation, and testing will be based on signed-off requirements captured during requirements and Discovery and Analysis phase of the project.
5. Any changes after requirements sign-off will follow a change control process which will assess timeline, resource and cost impacts to the project.
6. All data clean up, business process re-engineering and User acceptance preparation and execution is San Leandro's IT department's responsibility.
7. All work such as (report deployment, server side changes, APO,Java heap changes, etc.) Will have to involve Accela CRC because San Leandro is a cloud hosted site. It is necessary to have a current support agreement with Accela to perform these changes.

### 3. COSTS

#### COST

At the time of this “Soft Addendum to RFQ” we don’t have examples of some items on the list or technical requirements for the completed project so this “Soft Addendum to RFQ” is being approached as a Time and Materials project for the purpose of estimating an approximate total level of effort for the Items shown. 21Tech has provided a discounted Time and Materials rate of (140.00 per Hr.) based on the volume of work to be provided. It is the full intent of 21Tech to provide an accurate estimate with the information supplied; but with limited access to samples and to the systems in question, our team has provided a Time and Materials range.

DESCRIPTION	HRS.	RATE	AMT
Total hours for listed Request Items – Low Estimate	607	\$140	\$84,980
Total hours for listed Request Items – High Estimate	897	\$140	\$125,580



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REQUEST FOR QUOTE

ACCELA DEVELOPMENT (REPORTS AND CONFIGURATION CHANGES)

OCTOBER 20, 2015

UPDATED: NOVEMBER 9, 2015

City of San Leandro

Coordinator:

Tony Batalla

Information Technology Manager

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## Purpose and Objective

The purpose of this document is to provide descriptive information about each Report or Configuration change to be developed, updated, corrected, or created. The objective of this document is to receive a fair market value quote for the work detailed herein and to establish guidelines for working together on this project.

## Background

The City of San Leandro has several outstanding issues related to its Accela implementation since going live in February, 2015. It would like to request an established consultant (i.e., Accela Partner) to help the city resolve these issues. Affected divisions include: Planning, Building, and Engineering. Leads for each group have been identified and will work closely with the consultant to resolve specific issues related to their division.

## Report Approval Section

This section contains steps that the City of San Leandro has identified as its preferred way of managing this project. The process would include at minimum six steps with several City approval steps. The first step is for the City to propose a body of work to be completed (this will be based on the City's needs, priorities, and preference). approval is needed upon finishing this document stating all known requirements are clear so development of the report/chart can proceed. The second approval is needed after testing is complete and the report/chart is ready to be implemented into Production.

<b>Approval Steps</b>	<b>Approver (Name/Signature)</b>	<b>Date</b>
1. City proposes "body of work" (e.g., a Chart/Report to be created, modified, updated, etc AND/OR a configuration change in the Accela system)	City Project Team	
2. Consultant reviews request and estimates time and cost for the body of work	Consultant	
3. City reviews cost and time estimates and approves/denies	City Project Team	
4. If approved, work is scheduled and executed per requirements	Consultant	
5. City tests and approves final results	City Project Team	
6. Consultant closes request and sends invoice	Consultant	

## Request and Configuration Changes List (as of 11/09)

This section includes all known issues, errors, and changes that are required as of 10/30/15. The list, although comprehensive, is not exhaustive as there may be other issues identified that the City would require be reviewed. However, the City expected a quote for work based on this list. Examples can be provided and in many cases are already available as needed.

Number	Name	Requirements	Type (New Report, Fix, Bug)	Examples Provided
1	Project permits by entitlement	Number of planning project permits by entitlement (such as CUP, AR, AE, etc.) and to be able to sort by zoning district, multiple zoning districts, neighborhood, HOA, City Council District, date range, date received, and date closed (or final per Tidemark)	New Report	No
2	Residential square footage	Amount of new residential square footage sort by date range	New Report	No
3	Number of project permits	Number of planning project permits sort by date range, date received, and date closed (or final per Tidemark)	New Report	No
4	Staff assigned	Staff assigned to active planning projects, planning appeals, and planning pre-application	New Report	No
5	Planning Case Report	Need to run a report similar to the one from Tidemark called PLN – Planning Case Report (see attached), but with additional information: Type of project, Closed date or final (per Tidemark), Denied, Withdrawn, Expired, Revoked, Fees paid, and Zoning district	New Report	Yes (Confirmed)
6	Ad-hoc Report Training	Train key staff on how to use ad-hoc reports in Accela	Training	
7	Building Reports Fix:	Consolidated Comments Report for Building Permits need to pick up comments from the Workflow Comment Box. Also, can the Workflow Comment Box have unlimited characters?	Fix Report	No
8	Building Reports Fix:	Consolidated Comments Report for Building Permits need to pick up comments from comments tab, Conditions from Conditions Tab and Documents from the Documents Tab (that way these items all get to the applicant at one time through Consolidated Comments)	Fix Report	Yes

CITY OF SAN LEANDRO: ACCELA DEVELOPMENT

9	fees not calculating	Mike Schaffer added but fees not calculated; believe related to scripts written by TruePoint, include training or procedure on how to add additional users	Bug Fix/Training	Yes
10	Future new users	How to add/remove users and rates	Fix/Training	Yes
11	Grading, Encroachment Permit New Workflow Tasks during review and post-issuance	Need to add new workflow tasks: <ul style="list-style-type: none"> <li>• 6 tasks in Grading Permit</li> <li>• 3 tasks in Encroachment Permit</li> </ul> Include training or procedure on how to do this for ourselves.	Fix/Training	Yes (See Update)
12	Encroachment permit report	Add new items to encroachment permit report, report is written in crystal reports, specifically the deposit amount field and the total amount field.	Fix Report	Yes (Confirmed (
13	Permit intake fields	modify permit intake fields to help streamline permit intake, train on doing this in house	Fix/Training	No
14	Missing permits	(See #15 below)	End User Issue/ACA	No
15	Unable to access system	Cannot find permit using search and users thus are unable to schedule inspection. Issue is because outside users need to use record number/permit number to find anything using search. Address, parcel, etc search results are hit and miss.	End User Issue/ACA	No but confirmed by IT on 10/30
16	Report Scheduled by today department	Inspection scheduled for 6/9. However it does not show up to be printed out in, "Scheduled by today department."	Fix Report	No
17	Missing Clients	Client unable to pull up in Accela	Bug Fix	No
18	Add Supervisor button to Grading Permit workflows	Add Supervisor button to Grading Permit workflows	Fix	Yes

CITY OF SAN LEANDRO: ACCELA DEVELOPMENT

19	Inspection error	Inspection scheduling error message,	Bug Fix	Yes
20	Receipt error	Payment receipt number different when than report, example record payment receipt #73509 is #73510 when report is ran	Bug Fix	No
21	Inspection scheduling	Accela will not schedule an inspection afterhours (such as a weekend).	Bug Fix	No
22	Parcels in Flood Zone	Parcels that are not in flood zone are showing that they are	Bug Fix	No
23	License numbers cant be changed	Auto populates license numbers for architects, engineering, contractors and program will not let you correct the number or unattached the professional from the record	Bug Fix	No
24	Health and Safety Fee	Fee is not calculating right come up \$0 every time	Bug Fix	Yes
25	Fire Permits	Creating new Fire Application, program does not give you a contractor option	Bug Fix	no
26	Encroachment Permit Inspections	Better grouping of inspections, fix some of the autofill fields when resulting inspections, tie inspection rates to the master rate table	Bug Fix	no
27	Billable button in Encroachment & Grading Permit Workflows	All time entered should be default billable. Change checkbox to read "unbillable" instead of "billable"	Fix	Yes
28	Admin reports	Update Payment Record, Invoice and Receipt documents	Fix	Yes
29	Automatic emails	Setup automatic emails to notify other Accela users when a task is assigned to them.	Fix	No
30	Notices of Violation	Setup notice of violation reports for encroachment permits and grading permits	New Report	Yes

### **Timeline for Project**

The City would like to begin as soon as possible and will coordinate with the Consultant to determine timelines for each item listed above.





# City of San Leandro

## Information Technology

Request for Quote  
for  
**Accele Development**  
(Reports and Configuration Changes)

Proposal Submission:  
Friday, November 13, 2015



21Tech CONFIDENTIAL



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Oakland, CA 94612  
415.355.9090

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November 13<sup>th</sup>, 2015

City of San Leandro  
Information Technology  
835 East 14<sup>th</sup> Street  
San Leandro, CA 94577  
Attn: Tony Batalla

Dear Mr. Batalla,

Please find enclosed our proposal to you regarding the Request for Quote regarding Accela Development for San Leandro's Information Technology department. Our team is honored to be part of your consideration.

We believe an effective partner has to provide expertise in four areas:

- Experience in Municipal Public Sector implementations in general
- Proven Accela-specific experience
- Ability to troubleshoot, problem solve and resolve issues
- Provide exceptional customer service through ongoing communication

21Tech retains highly qualified staff and subject matter experts. We believe that our solution-centric approach to problem solving is a winning one, and a methodology that separates us from many providers.

As a partner with San Leandro's IT department, we look forward to earning your support, trust and respect by providing you with excellent customer services and creative solutions at competitive prices.

If you have any questions, or would like additional information on 21Tech, please contact me:

Phone: (415) 355-9090

Fax: (888) 715-0285

Email: [michael.young@21tech.com](mailto:michael.young@21tech.com)

Web: [www.21Tech.com](http://www.21Tech.com)

Sincerely,

**Michael Young**

**Michael Young**

Senior Technical Manager, 21Tech, LLC

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## INTRODUCTION

Vendor Name:	21Tech
Vendor Address:	1330 Broadway, Suite 701, Oakland, CA 94612
Vendor Contact Name:	Michael Young
Vendor Contact Phone Number:	415.355.9090
Vendor Contact Email Address:	Michael.Young@21tech.com
Date of Proposal Submitted to the City	11-13-2015

### WHY 21TECH?

21Tech has the pedigree to meet the needs of San Leandro’s Information Technology department with our:

- Unmatched experience with core specialties
- Local presence
- Our understanding of Government
- Our Flexible Approach.

### UNMATCHED EXPERIENCE WITH CORE SPECIALTIES

21Tech has successfully worked on several diverse municipal projects that range from simple implementations to complex, multi-platform, multi-tenant solutions.

21Tech specializes in Accela solutions for municipal public sector clients. We understand user interface, back-end integration, and reporting needs that are unique to municipal departments. Our staff includes architects, analysts, developers and project managers who are well versed in every part of Accela including but not limited to the following:

#### Skill Sets

- Accela (AA,AMO,AGIS,ACA,APPS)
- GIS
- Report Development
- App Development
- Java Script
- Java
- HTML,VB
- C#, VB.Net
- SSRS, SQL
- Crystal

#### Software

- Accela (All versions 6.5 – 8.0)
- ESRI, ArcGIS
- Database: Oracle 7.2, 9i, 10g, 11i, Microsoft SQL Server (2005-2012)
- Platforms: Microsoft Windows® 95, 98, 2000, XP, VISTA, 7, 8, Sever 2008, Server 2012

Given that this is our strength, we feel confident in providing you with a strong development service combined with experience and leadership you can trust.



## WE HAVE A LOCAL PRESENCE

21Tech has successfully implemented at least fifteen software systems within the Bay Area over the last ten years. With this experience comes an understanding of cross-departmental integrations, custom development, data migration, local municipality business and municipal rules and regulations. We have built a strong track record by understanding the importance of partnering with city departments. Projects require a strong partnership that is built, executed and relied upon throughout the implementation cycle. With 21 Tech’s management so close in proximity, we are invested in the success of the Bay Area community. Should an issue ever arise, it is nice to know you can always sit down and have a face to face with your 21Tech partners.

21Tech’s Accela local experiences include:

- City of San Francisco Department of Building Inspections, AA ACA AGIS Implementation
- City of San Francisco Department of Building Inspections, EDMS/ Accela Integration Project
- City of San Francisco Planning, AA ACA AGIS Implementation
- City of San Francisco Planning, EDMS, Accela Integration Project
- City of Oakland, Accela Reports Integration Project
- Accela Headquarters – assist with development work

We feel confident in our Accela team’s ability to develop solutions that will meet the needs of the San Leandro’s Information Technology department.

## WE UNDERSTAND GOVERNMENT

A municipal government has requirements and unique issues that differ from the private sector. 21Tech acknowledges this and has experience where private sector services companies may underestimate the differences. In our many years of working with municipalities we understand how to work with Subject Matter Experts from other departments to coordinate access to backend proprietary systems. It is our belief that success is in the details, and that with our municipal experience we have those details well in hand.

21Tech specializes in government services. Our three major verticals are Land Management, Asset Management, and Taxation – all of which are in government. We understand the nuances of working with government departments, and the level of involvement needed.

## OUR FLEXIBLE APPROACH

We like to approach solutions holistically – looking at the best options for the customer, not just for this solution, but possibly creating an environment or building blocks for applications that can be added to or interacted with years from now. This is why we offer the “health assessment” to our partners so you can move forward with the confidence and assurance that all your needs are being addressed not just the ones on the surface.

## ABOUT 21TECH

Established in 1996, 21Tech brings more than 18 years of experience as a systems integrator implementing commercial off the shelf (COTS) software packages like Accela. Our experience also includes software application development, business intelligence and data warehouse implementations, customer relationship management (CRM), enterprise asset management (EAM), telecommunications, workflow and project management.

Our extensive industry experience includes working with public sector clients such as the City and County of San Francisco, the State of California, the cities of Indianapolis, Chicago, Portland, and Las Vegas. Our experience with the private sector includes companies such as AT&T, Accela, Avaya, Infor, Microsoft, Oracle, Unisys, IBM Global Services, Franklin Templeton, Thompson Reuters, and Charles Schwab.

Municipalities and state agencies create a substantial percentage of our business because 21Tech adeptly addresses unique challenges in providing COTS implementations, strategy services, and general IT professional services. Regardless of the project, our goal is simple: the end result is easy to use, easy to expand and efficient for our client. We pride ourselves in our accessibility to our clients, and our ability to gain and maintain their trust. We truly understand that all projects have challenges. How we deal with such challenges and work with our clients to a successful resolution sets us apart from our competitors.

21Tech has developed a close working relationship with Accela starting in 2006. We are a Certified Accela Reseller and Implementation Partner. We have worked on several projects with them over these past eight years, and have developed a deep understanding of the many Accela Automation modules.

Our project experience includes implementations of the following:

- ▶ Program/Project Management
- ▶ Permitting Solutions
- ▶ Land Management Applications
- ▶ Asset Management Solutions
- ▶ Taxation and Revenue Solutions
- ▶ Data Warehouse and Dashboarding
- ▶ Business Licensing
- ▶ Vendor Management
- ▶ GIS Services and Solutions
- ▶ Workflow Management System
- ▶ Customer Service and CRM Applications
- ▶ Web Services
- ▶ Data Conversion
- ▶ Infrastructure and Facility Services
- ▶ Custom Application Development
- ▶ SharePoint/AD
- ▶ Enterprise Content Management
- ▶ System Conversion/ Upgrade

## Accela Permitting, Licensing, Building and Planning Expertise

21Tech provides business analysis, data migration, reporting, configuration and interface services for the Accela permitting and licensing software solutions to support Building, Planning and other city and state departments. The needs of the client involves complex legislature, business rules and parallel path workflow regarding planning and zoning, obtaining building permits, processing and recording building inspections, as well as recording complaints and property liens. These software

solutions are therefore highly configurable to the customized needs for each client and interfaces with other city department's solutions are required. As such, strong implementation strategies and project management are a requirement for successful implementations.

## Summary

We seek to offer the best user experience possible within Accela, so we focus on the details when it comes to form portlet design and the presentation of lists. Our staff is well versed in leveraging data filters and writing QuickQueries to ensure that the appropriate users are able to interact with the appropriate records, and have an aesthetically pleasing experience while performing data entry and querying the system.

We place a high value in the integrity of an Accela system. Our staff works exhaustively with our clients to make sure that user groups have the proper security settings, which are often controlled by Function Identifiers (FIDs) and sometimes through Standard Choices. When implementing Accela, we consider how functionality should be made available at different hierarchies, such as by user, user group, module, and/or agency-wide.

Thanks to our depth of working knowledge pertaining to Accela, we are proficient and have experience configuring some of what might be classified as the "deep" features within the platform. These include useful but often overlooked functionality, such as the asset management module, Smart Charts, time accounting, structures and establishments, ASI drill-downs, and sets.

## Experience with Accela Modules

- Accela Automation: Land Management
- Accela Automation: Asset Management
- Accela Automation: Service Requests
- Accela Citizen Access
- Accela GIS
- Accela Mobile Office
- Accela Inspector App (iOS and Android)
- Accela Code Officer App (iOS)
- Accela Work Crew App (iOS)
- Accela Analytics App (iOS)

## Conferences and Meetings Attended

- Accela Engage 2015 (Los Angeles, CA)
- Accela Engage 2014 (San Diego, CA)
- Accela Engage 2013 (San Diego, CA)
- Accela User Conference 2012 (San Diego, CA)
- Accela User Conference 2011 (San Diego, CA)
- Accela User Conference 2010 (Anaheim, CA)
- Accela Regional User Group Meetings (Various / Online: 2012-Present)
- Accela Asset Management User Group (Fort Worth, TX: Feb 2014)

## Accela-Related Presentations

- Inspection Scheduling Across the Accela Platform (Presented at Accela Engage 2015)
- (Class) Batch Scripting 101 (Presented at Accela Engage 2015)
- Managing a Self-Hosted Environment (Presented at Accela Engage 2014)
- How to Keep Up With the Upgrades (Presented at Accela Engage 2013)
- XAPO Marks the Spot: Leveraging Your GIS to Open Up the Power of Accela Automation (Presented at Accela Engage 2013)
- Tips and Tricks to Managing a Highly Scripted Environment (Presented at Accela Engage 2012)
- Diagnosing Accela Issues (How to) (Presented at Accela Engage 2011)

## 1. OUR TEAM

### 21TECH TEAM

#### 21Tech Development

21Tech Team:	Business Analysis	Config.	Scripting	Reporting	GIS	Technical Architecture	Data Migrations	Gov. Sector	Training
1. Michael Young	✓	✓	✓	✓	✓	✓	✓	✓	✓
2. Leah Fortune	✓	✓	✓	✓	✓	✓	✓	✓	✓
3. William Flynn	✓	✓	✓	✓	✓	✓	✓	✓	✓
4. Weldon Crabb	✓	✓		✓				✓	✓

### STAFF EXPERIENCE AND RESUMES

21Tech Response:



**MICHAEL YOUNG**, Sr. Technical Manager

21Tech Team:	Business Analysis	Config.	Scripting	Reporting	GIS	Technical Architecture	Data Migrations	Gov. Sector	Training
Michael Young	✓	✓	✓	✓	✓	✓	✓	✓	✓

Michael Young is a member of 21Tech’s professional services team, and has over 17 years of experience in the information technology field. In addition managing several IT organizations, he has very extensive knowledge in Accela. Mr. Young has spent the last 10 years as a public sector consultant focused on Accela implementation for city, county, and state governments. Michael is the Senior Technical Manager for 21 Tech’s Accela team. Prior to joining 21tech Mr. Young was Systems Manager managing an Accela team for a major metropolitan city. Michael has presented at the Accela national conference for the last 6 years. Most recently co-teaching a batch scripting class at the 2015 Accela Engage Conference. He has a wide range of experience in Accela implementation including, AA, ACA, AMO and AGIS. He has also earned his Six Sigma yellow belt developing a Six Sigma Accela Upgrade Process. He is also a .net developer and has developed several interfaces for various Accela integrations components.

Recent projects include:

- ◆ Mr. Young provided the Department of Planning with technical consulting services pertaining to the selection, implementation and integration of an Accela EDMS solution and document management suite for a combined City/County on the West Coast. Responsible for documenting business processes, advising clients and colleagues about software best practices, and developing a decision matrix for product selection. Mr. Young assured the integration could be completed with Automation, Citizen Access, and AccelaGIS. He identified and addressed budgeting and contract issues with selected products, provided an interface template for integration with Automation and facilitated user acceptance testing and training on product selection.
- ◆ Mr. Young provided a large city county government with technical consulting services for the implementation of Accela Master Script 3.0 upgrade. The custom nature of the specific agency’s integration required a great deal of knowledge of Accela scripting. Mr. Young was able to customize and integrate a complete solution that allowed for seamless integration and operation. He was also able to develop, implement and integrated VSN server solution to allow for a complete versioning system for the entire agency.
- ◆ Mr. Young managed an integration for a major metropolitan city’s development effort when the sewer system was sold to a private company. He led an Accela development team to divide a previously integrated Accela system into multiple modules. During this project he was able to successfully architect and develop a solution that had been previously thought of as impossible before. The solution allowed the individual modules to use Multiple EDMS Solution

based on record types. The documents could be stored in one or many locations. This innovative new type of interface allowed these agencies the ability to share resources while maintaining their separate status.

- ◆ Mr. Young managed a team to evaluate and develop a new and improved way to deploy upgrades to the Accela System. This process allowed for Six Sigma processes to be incorporated to the Accela upgrade process. The newly developed upgrade process provided the agency with a significantly more efficient process, less down time, and less overall cost for the agency during and after the upgrade.
- ◆ Mr. Young was project manager during the Implementation of Accela Licensing into a city/county government agency. He was responsible for collecting user requirements, developing project work plans, developing and monitoring project schedules, assessing and mitigating risks, procuring resources, managing project teams, developing performance metrics for project milestones, developing reports, reporting on project progress, and documenting lessons learned. He also provided technical training and mentoring to staff.
- ◆ Mr. Young was the chief technical resource for the Accela Implementation for a city/county IT Department responsible for maintaining and providing all Accela services to its client. Mr. Young served as the subject matter expert on a long term engagement providing a variety of services. His responsibilities included extensive configuration of; Automation, Citizens Access, Mobile Office, App Development, Interface development, Script writing (EMSE, Batch, and Master), Expression development, developing best practices, report development, GIS updates. The agency also required the development of an integrated change control system to keep track of all changes in Accela. Mr. Young was also responsible for customer service of the agency's clients maintaining a perfect record and maintaining and exceeding every SLA.
- ◆ Mr. Young attended Purdue University where he majored in Computer Information Technology and Minored in Organizational Leadership. Mr. Young also has several certifications in the IT field including; FileNet Administration, Microsoft Certified SharePoint Developer, Altiris/Wise Repackaging, Organizational Leadership, and A+ Certifications.

## Michael C Young

Senior Technical Manager 

Michael has seventeen years of experience in Information Technology, balanced between private industry and the government sector. He has managed several IT organizations starting with his own company in the late 1990s. In 2003, Michael moved into a Director of IT role for a world-wide manufacturing company. After several years, he moved to a government consulting role with Daniels Associates Inc. He was in that role for the last ten years. In that role he has managed the Accela system for the City of Indianapolis since 2008 as their systems manager.

Michael has presented at the Annual Accela Engage Conference in 2010, 2011, 2012, 2013 and 2014 (Michael co-taught a breakout session in 2015 on Batch Scripting). He has presented on several topics including: Managing a Self-Hosted Environment; How to Upgrade Accela; and Best Practices of Script Writing.

*Specializations:* Systems Integration; Project Management; Writing Interfaces; Giving Presentations, Team Management; Records Management; License Management;

*Industries:* Government (Local and State); Utilities (Water, Wastewater, Gas); Transportation; Public Works; Land Records; Water Resources

### Accela Implementation Experience

- 6+ years of experience administering and consulting with the Accela system (AA, ACA, AMO, AGIS, Apps)
- 5+ years of experience in report writing against Accela's data model using Crystal Reports 2008 and SSRS 2008
- 6+ years developing interfaces using govxml
- 17+ years managing implementation teams for various software integrations
- Requirements gathering and business analysis
- Specifications gathering for configuration and reports
- Writing custom functions, expressions, and event scripting
- Applications: Permitting, Planning; Code Enforcement; Inspections; Licensing; Work Orders; Service Requests
- Administration of self-hosted environments
- User Training (AA, ACA, AMO, AccelaGIS, Apps)
- 6 Years Attending and Presenting at Accela National Conferences; User Group; Frequent contributor to Accela Community

### TECHNICAL EXPERTISE

**Accela Automation (All versions from 6.7 to 7.33) :** AA, AMO, ACA, AGIS, Gateway, Self-Hosting, Record Type Configuration; Workflow Design; Fee Schedule Implementation; ASI/ASIT Design; Form Portlet Design; Security; Calendaring / Inspection Scheduling; Conditions; Master and Custom Scripting using (version. 1.4 - 3.0); Batch Scripting; Multiple Types of Interfaces (Payment Interfaces, EDMS Interfaces, and other govxml based Interfaces)

**Productivity Software:** Word, Excel, PowerPoint, Access, Publisher, Outlook, Visio

**Scripting / Languages:** JavaScript, VisualBasic.NET, C#, SQL, Ideal, Cobal.

**Database:** SQL Server

**Reporting Applications:** SSRS 2008 R2, Crystal Reports 2008

**Content Management System:** Microsoft SharePoint

**Project Management:** Microsoft Project 2007

### PROFESSIONAL EXPERIENCE

Senior Technical Manager Oct 2015  
21Tech, San Francisco, CA to Present

Accela Systems Manager July 2005  
Daniels Associates Inc. / City of Indianapolis, IN to Oct 2015

Director of Information Technology Feb 2003  
Stratis Corporation, Indianapolis, IN to July 2005

Owner / Software Architect Dec 1998  
Young Consulting, Indianapolis, IN to Feb 2003

### EDUCATION

Computer Information Technology Major  
Organizational Leadership Minor  
Purdue University, 1997 - 2005

AAS, Computer Information Technology  
Purdue University, 2004

### CERTIFICATIONS

FileNet Administration Certification  
FileNet / July, 2009

SharePoint Developer Certification  
Microsoft / May, 2009

Altiris / Wise Repackaging Certification  
Wise Certification / February, 2007

Organizational Leadership Certification  
Purdue University / May, 2004

Information Technology Certification  
Purdue University / December, 2002

A+ Certification  
Purdue University / May, 2000

**LEAH FORTUNE**, Accela Content Manager

21Tech Team:	Business Analysis	Config.	Scripting	Reporting	GIS	Technical Architecture	Data Migrations	Gov. Sector	Training
Leah Fortune	✓	✓	✓	✓	✓	✓	✓	✓	✓

Leah Fortune is a member of 21Tech’s professional services team, and has over 5 years of experience in Accela consulting, project management, change control integration, report writing, and quality assurance. Ms. Fortune has extensive experience with permitting and licensing systems at various levels of government in the public sector, and is a Lead Analyst on 21Tech’s Accela team. Ms. Fortune is also responsible for closely working with clients and partners to ensure strong results through proper expectations and guidance. Prior to joining 21Tech, Ms. Fortune spent three years administering and configuring two separate full-scale Accela implementations for state agencies.

Recent projects include:

- ◆ Ms. Fortune provided departments of building inspection and planning with technical consulting services pertaining to the implementation of its Accela land management suite for a combined city/county on the West Coast. Responsible for documenting business processes, advising clients about Accela best practices, performing extensive configuration within Automation, Citizen Access, and writing scripts automating routine to complex actions based on analysis of client-provided logic, developing Crystal reports, facilitating user acceptance testing and training sessions, developing user guides and reference materials, and documenting lessons learned.
- ◆ Ms. Fortune served as a Subject matter Expert for Accela Citizen Access Implementation of Health Care and Professional Licensing for a state agency. Responsible for developing project plans, tracking project progress, engaging stakeholders, reviewing deliverables from consultants, training and practicing regular knowledge transfer with professional staff of nine programmers and support staff. Evaluated change requests for Accela Automation configuration, scripting, and reporting needs, providing business need analysis and solution options, creating work plan and user testing plan documents, estimating delivery date, and executing the plan.
- ◆ Ms. Fortune was key in developing and implementing a Change Control Process between client and their internal IT staff for a state agency. Responsible for streamlining operations and business process reengineering using data and interview driven analysis, and reducing waste based on IT usage and policy. Developed Business Intelligence for IT assignment tracking.
- ◆ Ms. Fortune administered and configured a comprehensive self-hosted Accela implementation for a state agency, including Land Management, Licensing, AccelaGIS, Accela Mobile Office, and Accela Citizen Access. Responsible for overseeing full design of record types and inspections, configuration (i.e., FIDs, Standard Choices, event-driven customization (expressions, scripts, and custom functions), workflows, data validation, establishing interfaces to GIS and payment systems, report writing, and user training. Developed Business Intelligence to comply with Public Information Act.
- ◆ Ms. Fortune served in the capacity of Data Management project manager during archival and conversion of statewide boiler program records for a state agency. Responsible for developing project work plans, identifying and consulting with stakeholders, collecting user requirements, developing and monitoring

21Tech Response:





project schedules, procuring resources, managing project teams, assessing and mitigating risks, performing quality control, developing performance metrics for project milestones, reporting on project progress, and documenting lessons learned. Provided technical training and mentoring to staff of six professionals. Daily work involved extensive quality assurance / quality control and data analysis.

- ◆ Ms. Fortune received Bachelor of Arts (B.A.) emphasizing research and communications from Carroll College, Helena, Montana.
- ◆ Ms. Fortune is a certified Project Management Professional (PMP).

## Leah Fortune, PMP

Accela Content Manager 

Ms. Fortune has 15 years of experience in Content Management, balanced between public and private sector positions. The past six years, she has worked exclusively with the Accela Enterprise Solution, working with small teams to implement multi-faceted solutions for jurisdictions of over one million public users. Ms. Fortune is an expert at using business process analysis, design, and redesign to help clients understand their organizational needs, and determining how those goals are best translated into enterprise software via configuration, customization and integration approaches. She manages overall content to ensure the use of repeatable processes and general efficiency.

Leah's experience includes documenting business processes, advising clients about best practices, performing extensive configuration within Automation, Citizen Access, and writing scripts automating routine to complex actions based on analysis of client-provided logic, developing Crystal reports, facilitating user acceptance testing & training sessions, developing user guides & documenting lessons learned. She is also responsible for managing client expectations and sign-off, and supporting and nurturing client/user buy-in.

**Specializations:** Systems Integration; Project Management; SSRS Reports; Crystal Reports; System Configuration, Accela Database Model; Team Management; Records Management; Content Management; Risk Management

**Industries:** Government (Local and State); Land Management; Professional Licensing; Health Care Licensing; Public Works; Fire Department; Utilities (Water, Wastewater)

### Accela Implementation Experience

- 5 years of experience implementing and administering
  - Accela Platform (AA, ACA, AMO, and Inspector App)
  - 5 years of report development against Accela's Database Model using SSRS 2008 & Crystal Reports 2008
  - Requirements gathering and business analysis
  - Specifications for configuration, scripting, and reports
  - User Training (AA, ACA, AMO, Accela Inspector App)
  - Implementing Content Management Strategy to support data migration & reporting
  - Managing Change Control and Content to mitigate risks
  - Ensuring all content is consistent in terms of style, quality and tone of voice, and optimized for search and user experience for all channels of content including Accela Citizen's Access
  - Creating reusable processes for system efficiency
  - Recognized at the 2012 Accela User Conference for the largest full-scale Citizen Access implementation
- **Land Management, Licensing, and Custom Configuration:**
- Workflow Elements and Automation
  - Application Specific Information/Custom Fields
  - Specialized Fee Formulas and Fee Automation
  - Inspection Elements & Calendaring
  - Event-Based Automation
  - Expiration/Renewal Processes
  - Intake Forms and Portlet Designer

### TECHNICAL EXPERTISE

**Accela Automation:** AA, AMO, ACA, AGIS, Gateway, Self-Hosting, Record Type Configuration; Report Configuration; Workflow Design; Fee Schedule Implementation; Custom Fields and Lists Design; Form Portlet Design; Security; Calendaring / Inspection Scheduling; Conditions; Standard Choice Event-Based scripting

**Productivity Software:** Word, Excel, PowerPoint, Access, Publisher, Outlook, Project, SharePoint

**Computer/Programming Background:** Management System: Accela Automation, Accela 360, SQL, JavaScript, Microsoft SQL Server Management Studio, Microsoft Business Intelligence Development Studio, Ralileo, Crystal Reports 2008

### PROFESSIONAL EXPERIENCE

Senior Business Analyst 21Tech, San Francisco, CA	2013 to Present
Accela Systems Programmer State of Montana	2010-2013

### CERTIFICATIONS

PMP Certification  
Project Management Institute, 2015

### EDUCATION

B.A., English and History  
Carroll College, 2004

**WILLIAM FLYNN**, Accela Solutions Architect

21Tech Team:	Business Analysis	Config.	Scripting	Reporting	GIS	Technical Architecture	Data Migrations	Gov. Sector	Training
William Flynn	✓	✓	✓	✓	✓	✓	✓	✓	✓

William Flynn, Ph.D is currently a member of 21Tech’s professional services team, and has over 16 years of experience in technical consulting, IT/GIS management, project management, systems integration, audits, and quality assurance. Dr. Flynn has extensive experience with permitting and licensing systems at various levels of government in the public sector, and is the Lead Architect of 21Tech’s Accela Team. Prior to joining 21Tech, Dr. Flynn spent three years administering and configuring a comprehensive Accela implementation for a municipality in Texas. Dr. Flynn is an active member within the Accela user community, presenting regularly at Accela’s national and regional meetings, having previously served as an officer for multiple regional and product user groups, and continually offers technical solutions and advice on best practices to other users on the Accela Community Forum. He has also been certified by Accela in Scripting 3.0 and recognized as an Accela Implementation Professional (Bronze).

Recent projects include:

- ◆ Dr. Flynn provided departments of building inspection and planning with technical consulting services pertaining to the implementation of its Accela land management suite for a combined City/County on the West Coast. Responsible for documenting business processes, advising clients and colleagues about software best practices, performing extensive configuration within Automation, Citizen Access, and AccelaGIS, writing scripts and custom functions, mapping fields for data conversion, writing reports, facilitating user acceptance testing and training sessions, performing system troubleshooting, developing project plans, and documenting lessons learned. Scripted against a contractor state license board Web service to validate appropriate licenses were held by professionals prior to permit issuance.
- ◆ Dr. Flynn provided independent verification and validation (IV&V) services surrounding the implementation of an advanced metering infrastructure (AMI) deployment for a municipal water and electric utility in Texas. Responsible for quality assurance, audit and oversight of development and integration efforts (included a utility billing/customer information system, computerized maintenance management system, meter data management program, enterprise GIS, and several other metering applications and databases), reporting over project progress, calculating performance metrics, performing spatial analysis to assess the success rate of the mesh network architecture of collectors and nodes and identify suitable locations for additional collectors, review of system hardware and software/database configurations, and documenting findings, anomalies, and recommendations for process improvement.
- ◆ Dr. Flynn single-handedly administered and configured a comprehensive self-hosted Accela implementation for a municipality in Texas, including Land Management, Licensing, Asset Management, AccelaGIS, Accela Mobile Office, Inspector app, Code Officer App, and Accela Citizen Access. Responsible for full design of record types and inspections, configuration (i.e., FIDs, Standard Choices, event-driven customization (expressions, scripts, and custom functions), workflows, data

21Tech Response:



validation, establishing interfaces to GIS and payment systems, report writing, and user training. Specific examples of licensing established within Accela included food establishments, drinking establishments, catering services, mobile food trucks, pet licensing, and a variety of professional contractors.

- ◆ Dr. Flynn served in the capacity of technology project manager for a municipal public services department in Texas. Responsible for developing project work plans, identifying and consulting with stakeholders, collecting user requirements, developing and monitoring project schedules and budgets, procuring resources, managing project teams, assessing and mitigating risks, performing quality control, developing performance metrics for project milestones, reporting on project progress, and documenting lessons learned.
- ◆ Dr. Flynn oversaw the operation of a data management branch of a transportation planning and programming division for a state department of transportation. Responsible for supervising a group of eight technical and professional employees who collected, analyzed, and integrated large volumes of data on highways, bridges, and railroad crossings into inventory files and graphic geodatabases. Provided software and data collection training to district field staff, conducted highway performance monitoring system audits in the field, and certified the annual county road mileage to the state comptroller for disbursement of funds to the state's counties. Daily work involved extensive quality assurance / quality control and data analysis.
- ◆ Dr. Flynn served as GIS Manager for a large county in the Southwest, serving as the county's subject matter expert on GIS and geotechnology, and was the architect behind all mapping applications used across the County. Coordinated GIS development with other county departments and outside agencies. Integrated enterprise GIS with other county systems, including Accela PermitsPlus for the development services one-stop shop, as well as public works' work order / asset management system and the assessor's CAMA system.
- ◆ Dr. Flynn served as an internal project manager for its surface water quality division for a state environmental agency. Responsible for developing project plans, tracking project progress, engaging stakeholders, reviewing deliverables from consultants, giving presentations, and performing spatial analysis and hydrologic modeling. Also served on the board of directors for two different GIS steering committees.

Dr. Flynn received a Ph.D. in geography from Oklahoma State University, a Master of Applied Geography (M.A.G.) in GIS and cartography from Texas State University, and a Bachelor of Music (B.M.) in classical guitar performance from California State University, Fullerton. He also holds the certifications of Project Management Professional (PMP), Certified Scrum Master (CSM), and Geographic Information Systems Professional (GISP).

## William Flynn, PhD, PMP, CSM, GISP

William has sixteen years of experience in GIS and Information Technology, balanced between academia and the applied realm. He has served in several levels of government, including state, county, and most recently, municipal. William has applied GIS experience ranging from land records to utilities and surface water modeling to redistricting. He has also taught GIS to high school, community college, and university students over the past decade. Through his GIS roles with various local government agencies, William also came to administer numerous land and asset management systems, while achieving tight integration with enterprise GIS. He is a Project Management Professional (PMP) and Certified GIS Professional (GISP). In Fall 2014, William completed a Ph.D. in Geography at Oklahoma State University.

**Specializations:** GIS; Cartography; Project Management; Land & Asset Management Systems; Database Administration; Systems Integration; Report Writing; Spatial Analysis; Statistics; Quality Control Methods; Giving Presentations; Instruction; Technical Writing; Research

**Industries:** Government (Local and State); Utilities (Water, Wastewater, Electric, and Gas); Transportation; Public Works; Land

### Accela Implementation Experience

4 years of experience administering and consulting with the Accela platform (AA, ACA, AMO, AGIS, Apps)  
 4 years of experience in report writing against Accela's data model using Crystal Reports 2008 and SSRS 2008  
 16+ years of GIS experience; Skilled with reciprocal integration between Accela and Esri, including External Address-Parcel-Owner (XAPO), GIS-based asset management, and mapping Accela data in ArcGIS.  
 Requirements gathering and business analysis  
 Specifications gathering for configuration and reports  
 Writing custom functions, expressions, and event scripting  
 Applications: Permitting, Planning; Code Enforcement; Inspections; Licensing; Work Orders; Service Requests  
 Administration of self-hosted environments  
 User Training (AA, ACA, AMO, AccelaGIS, Apps)  
 Attended/Presented at Accela National & Regional User Conferences; Regional Officer for Southwest Region (2012-13); Founding Member of Accela Asset Management User Group; Frequent contributor to Accela Community  
 Certified by Accela in Scripting 3.0  
 Certified by Accela as Implementation Professional (Bronze)

### TECHNICAL EXPERTISE

**Accela Automation 7.3.3.7:** AA, AMO, ACA, AccelaGIS, Inspector App, Code Officer App, Self-Hosting, Record Type Configuration; Workflow Design; Fee Schedule Implementation; ASI/ASIT Design; Form Portlet Design; Security; Calendaring / Inspection Scheduling; Conditions; Master/Custom Scripts; Batch Scripting; Third-Party Payment Interfaces; Accela Document Service (ADS); Time Accounting

**Other CMMS / Work Order Systems:** Maximo 7.5, Cartegraph 8, ManagerPlus Pro

**Productivity Software:** Word, Excel, PowerPoint, Access, Publisher, Outlook, Visio

**Scripting / Languages:** JavaScript, VisualBasic.NET, Python, C#, SQL

**Database:** SQL Server and Oracle

**Reporting Applications:** SSRS 2008 R2, Crystal Reports 2008, Cognos 8

**GIS Software:** ArcGIS Desktop 10.2, ArcGIS Server 10.2, ArcGIS Extensions (Spatial, Network, 3D, Geostatistical), Geocortex Essentials 4

**GPS: Handhelds:** Trimble GeoExplorer 6000XH, Trimble Juno 5B, Trimble Yuma / **Software:** Pathfinder Office, TerraSync, ArcPad

### PROFESSIONAL EXPERIENCE

Solutions Architect	Oct 2014
21Tech, San Francisco, CA	to Present
Senior IT Specialist / Accela Administrator	Apr 2012
City of New Braunfels, TX	to Oct 2014
Advanced Metering Infrastructure Consultant	Dec 2010
City of San Marcos, TX	to Oct 2014
Digital Data Support Branch Supervisor	Dec 2011
Texas Department of Transportation, Austin	to Apr 2012
GIS Manager	Dec 2010
Yuma County, AZ	to Nov 2011
GIS / Technology Project Manager	Mar 2009
City of San Marcos, TX	to Dec 2010
GIS Specialist III	Jan 2002
Texas Commission on Environmental Quality, Austin	to Dec 2004

### EDUCATION

Ph.D., Geography
Oklahoma State University, 2014
M.A.G., Master of Applied Geography
Texas State University, 2001
B.M., Bachelor of Music
California State University, Fullerton, 2000

### CERTIFICATIONS

PMP, Project Management Professional
Project Management Institute / March 2014 / License 1697778
CSM, Certified ScrumMaster
Scrum Alliance / March 2015 / License 000418129
GISP, Certified GIS Professional
GIS Certification Institute / August 2010 / License 00063947
ArcGIS Desktop Associate
Esri Technical Certification / July 2011

**WELDON CRABB**, Sr. Business Analyst

21Tech Team:	Business Analysis	Config.	Scripting	Reporting	GIS	Technical Architecture	Data Migrations	Gov. Sector	Training
Weldon Crabb	✓	✓		✓				✓	✓

Weldon Crabb is a member of 21Tech. Mr. Crabb has over 25 years of extensive systems knowledge from a programming prospective and a variety of accumulated business experiences to bridge the interface gap between Business and System requirements, bringing system architectural integrity perspective to any business solution. Mr. Crabb has been engaged for the past 7 years with permitting and licensing systems in the public sector. He has led Fit/Gap assessments, documented baseline Configuration requirements, performed configurations, managed reporting requirements and acted as led Subject Matter Expert (SME) during UAT cycles.

Recent projects include:

- ◆ For a large western municipal department, acted as led Business Analyst and provided quality assurance services in support of the Accela licensing and permitting product suite. Conducted As-is/ To-be requirement assessments, advised, documented, and baselined configuration requirements for 45+ case types, and implemented configurations. Also led report development through entire lifecycle, identifying and cataloging scope, report specifications, Development SME, UAT and implementation coordination.
- ◆ For a large western municipal Building Inspection department, stepped in as Business Analyst to reconcile problem case types and provided quality assurance services in support of the Accela licensing and permitting product suite. Also acted as Report Development SME, UAT and implementation coordination, and report specification clean-up.
- ◆ For a large western municipal Planning and Building Inspection departments, acted as Business Analyst and provided quality assurance services in support of the Accela licensing and permitting product suite. Supported report development through entire lifecycle, identifying and cataloging scope, report specifications, development SME, UAT and implementation coordination.
- ◆ For a large municipal Planning department, performed as-is analysis of the Accela planning, enforcement, and inspection vendor solution, which included reviewing client requirements and assessing them against vendor capabilities.
- ◆ Prepared Planning and Budget report for major western municipality, with in-depth analysis on optimum lease/ refurbishment rates against Gartner statistics, and Gold standard best practices.
- ◆ From project inception, was a team member as Sr. Business Analyst to implement a DataMart and Business Intelligence GUI to support City Statistics and KPI's for several departments and every division of DPW for a major mid-western municipality. Detailed requirements for extracts, transformation, and load API's were delivered. Worked closely with developers for quality assurance and adherence to requirements.
- ◆ Consolidated 5 legacy in-house systems for the Human Resource department of a major western city into a DataMart for Business Intelligence reporting and statistics. Led discovery process to ensure existing systems could support meaningful data points for city oversight and managerial support.

# Weldon Crabb

## Sr. Business Analyst

### PROFESSIONAL SKILLS

#### BUSINESS

Over 37 years of extensive systems knowledge from a programming prospective and a variety of accumulated business experience to bridge the interface gap between Business and System requirements. Bringing system architectural integrity perspective to any business solution. Requirements acquired through interviews, JAD, surveys and other appropriate methodologies. As author of system and business/system requirements have acted as lead throughout entire development life cycle as subject matter expert, engaged in development and implementation, use case creation and UAT support, attend to production implementation concerns, and act as front-end, back-end client liaison in realizing business goals through IT system solutions.

#### TECHNICAL

Requirements Software: MS Office Suite, Microsoft Project, Word, Excel, VISIO, PowerPoint.

Computer/Programming Background: Accela Automation, Accela 360, XML, SQL, FCIF, CICS, MDI, Access Server gateway, Intertest, Dialogue Manager (ISPF), Expediter (CICS & ISPF). CEDF, SDF, BMS/GT, VSAM; Abendaid, Fileaid, TBEDIT, Eztrieve, DYL-280, DLTO, Datavantage, MVS Utilities; MVS/XA, JCL. TSO/ISPF, Panvalet, Endeavor.

Languages: XML, SQL, FCIF, Pacific Bell Interpreter, Programmable Validation Scripts, COBOL II, RPG II, DL/I, Script/GML, CLIST

Hardware: IBM Mainframes, IBM PC, Apple Macintosh, IBM Series/1, and IBM System/34 Minicomputers.

Databases: Oracle SQL, Sybase, DB2/QMF, IMS/DB.

### EXPERIENCE

2007, Sep - Present/21Tech/San Francisco, CA

SR. BUSINESS ANALYST

- San Francisco – Accela Automation Implementation for Planning and Inspections departments
- City of Oakland – Accela Automation Reports
- Salt Lake City – Accela Automation, Permit Tracking
- Indianapolis – INDY Stat
- San Francisco – COIT Planning & Budget, TE Study, HRC BI, Proposals, Enterprise O365 rollout

2006, Apr-2007, Dec/ AT&T./San Ramon, CA

BUSINESS ANALYST CONSULTANT

2006, Feb - 2006, April/CSAA/San Francisco, CA

BUSINESS ANALYST CONSULTANT 2006, Jan - 2006, Feb/21Tech-SF CRM/San Francisco, CA

SYSTEMS ANALYST CONSULTANT

2003, July - 2005, May/SBC Internet Services/San Ramon, CA

SYSTEMS ANALYST CONSULTANT

2001, Feb-2002, Nov/SBC Work Flow Mngr. /San Ramon, CA

SYSTEMS ANALYST CONSULTANT

1998, Oct. - 2000, Oct./Telcordia/Piscataway, NJ

SYSTEMS ANALYST CONSULTANT

### SUMMARY

#### Experience

- 15 Years Business Analysis
  - BI Analysis
  - Surveys
  - JAD
  - UAT
  - Asset Management
  - Site Observations
  - Data/GAP Analysis
  - Vendor Evaluations

#### Accela Implementation Skills

- 5 Years AA Implementations:
  - As-is/To-be Requirements
  - Configuration Requirements
  - Configuration Build/ Implementation
  - Expression Builder
  - Report Specifications
  - Report Configurations
  - Training/ UAT Support
  - Vendor Evaluations



## 2. ACCELA DEVELOPMENT REQUIREMENTS

### ISSUES, ERRORS, AND CHANGES

This section is a recap of the requests listed in the RFQ. Associated to each request is a brief description of our understanding and possible resolution, and the estimated effort for resolution.

#	TASK NAME	REQUIREMENT	TYPE	EX.	RESPONSE	(HRS) LOW	(HRS) HIGH
1.	Project permits by entitlement	Number of planning project permits by entitlement (such as CUP, AR, AE, etc.) and to be able to sort by zoning district, multiple zoning districts, neighborhood, HOA, City Council District, date range, date received, and date closed (or final per Tidemark)	New Report	No	Work effort to develop new report includes business analysis, report specifications document with mock-up, development of Crystal report, load and configuration within Accela's Report Manager, unit testing, and user acceptance testing. Our numbers were based on the standard reports time which is estimated at 32 hours.	32	40
2.	Residential square footage	Amount of new residential square footage sort by date range	New Report	No	See above #1	32	40
3.	Number of project permits	Number of planning project permits sort by date range, date received, and date closed (or final per Tidemark)	New Report	No	See above #1	32	40
4.	Staff assigned	Staff assigned to active planning projects, planning appeals, and planning pre-application	New Report	No	See above #1	32	40

21Tech Response:





#	TASK NAME	REQUIREMENT	TYPE	EX.	RESPONSE	(HRS) LOW	(HRS) HIGH
5.	Planning Case Report	Need to run a report similar to the one from Tidemark called PLN – Planning Case Report (see attached), but with additional information: Type of project, Closed date or final (per Tidemark), Fees paid, Zoning district,	New Report	Yes	See above #1	32	40
6. a.	Report Training (End Users)	Train staff on how to use reports in Accela	Training		This training curriculum and delivery will help San Leandro's end users learn how to render, export, and print reports from Accela. In addition to the time it takes with the user it will take time to prepare a session specifically for the target audience	4	8
b.	Report Training (Power Users)	Train staff on how to use reports in Accela	Training		This training curriculum will be geared to San Leandro's power users and will include topics of ad-hoc reporting, configuration of Report Manager, orientation to the Accela database and functions, and Crystal report development against the Accela database. In addition to the time it takes with the user it will take time to prepare a session specifically for the target audience	5	10
7.	Building Reports Fix:	Consolidated Comments Report for Building Permits need to pick up comments from the Workflow Comment Box. Also, can the Workflow Comment Box have unlimited characters?	Fix Report	No	This training curriculum will be geared to San Leandro's power users and will include topics of ad-hoc reporting, configuration of Report Manager, orientation to the Accela database and functions, and Crystal report development against the Accela database. In addition to the time it takes with the user it will take time to prepare a session specifically for the target audience	6	10

21Tech Response:



#	TASK NAME	REQUIREMENT	TYPE	EX.	RESPONSE	(HRS) LOW	(HRS) HIGH
8.	Building Reports Fix:	Consolidated Comments Report for Building Permits need to pick up Conditions from Conditions Tab and Documents from the Documents Tab (that way these items all get to the applicant at one time through Consolidated Comments)	Fix Report	No	The workflow comments are stored in the GPROCESS table's SD_COMMENT field, which is a 4,000-character field. The report would be modified to incorporate workflow comment text. This does not include any additional configuration pertaining to workflow and/or task-specific information. This report will likely require use of a sub report.	8	16
9.	New User fees not calculating	Mike Schaffer added but fees not calculated; believe related to scripts written by TruePoint	Bug Fix	No	Content about transactional conditions and documents can be pulled from the B6CONDIT and BDOCUMENT families of tables, respectively, and included within existing reports. This does not include any additional configuration pertaining to conditions or document metadata. This report will likely require use of a sub report.	4	8
10.	Future new users	What scripts are affected when new users are added, possible to train staff to modify scripts on our own?	Training		This request needs to be better understood. Based on current understanding, we would identify any special considerations surrounding the creation of new Accela users, and would provide a playbook for how to handle personnel turnover, e.g. new hires, position changes, termination/ separation, etc., and identify all places in Accela that need to be updated, such as user profiles, inspector profiles, workflow designer, shared dropdowns, Standard Choices, etc. Your scripts should not need to be modified, but constructs that they leverage most likely will need attention. This might take some time with specific users to figure out the needed details to resolve an issue. We expect that when we review the error it will reveal a Fee and where it is triggered from (WTUA, ASIUA, etc.)	4	8

21Tech Response:



#	TASK NAME	REQUIREMENT	TYPE	EX.	RESPONSE	(HRS) LOW	(HRS) HIGH
11.	Grading, Encroachment Permit New Workflow Tasks	"Weird error" during task creation, only done in support site so far, but cannot move forward into production	Bug Fix	Yes	See above #9	6	12
12.	Encroachment permit report	Add new items to encroachment permit report, report is written in crystal reports	Fix Report	Yes	Need supporting documentation in order to troubleshoot this item. Debug window output, screenshots, etc. would be very helpful. This may not be an error, but per discussion with Tony and Dale, may be a training issue surrounding workflow design. We also suspect it could be an incomplete workflow which can be fixed by validation or training.	16	24
13.	Permit intake fields	modify permit intake fields	Bug Fix	No	Effort will be less for this report than a new build because it has already been written and just needs some modifications. Scope will include business analysis, specifications for encroachment-related content that needs to be added, mock-up, revision to Crystal file, load within Accela Report Manager, unit testing, and user acceptance testing. Estimated hours will increase if it is determined that additional configuration and/or data migration is necessary to support revised report content. After reviewing the sample it did not appear that the sample was a report taken from Accela. We may need further clarification before this can be resolved.	4	24

21Tech Response:



#	TASK NAME	REQUIREMENT	TYPE	EX.	RESPONSE	(HRS) LOW	(HRS) HIGH
14.	Missing permits	Accela cannot find permit, unable to schedule inspection	End User Issue/ ACA	Yes	Our understanding is that the intake form (formerly called SmartChoice Group) and ASI form portlet(s) on the SPEAR form needs to be decluttered. This estimate has a range because we do not have a feel yet for how many record types need to be treated. This can change significantly based on the records affected	16	30
15.	Unable to access system	Users need to use record number/permit number and cannot search by address	End User Issue/ ACA		Not being able to find the permit could be related to the Global Search's index not being rebuilt on a frequent-enough basis (it should be a batch job). In order to schedule inspections online, the inspection types must be associated with an inspection calendar, and ACA must be given access to schedule, reschedule, and/or cancel inspections. There are many parameters for ACA that need to be set in AA, too. ACA accounts need to be linked to your licensed professionals in AA as well. We can also explore the ACA general and module-based settings to make sure that you will be able to successfully query records by permit number and property, and that inspections can be scheduled. These types of problems can be tough to diagnose because there are often multiple problems and it can act differently based on user. We will need to include reviewing FID's and changes to ACA.	12	24

21Tech Response:



#	TASK NAME	REQUIREMENT	TYPE	EX.	RESPONSE	(HRS) LOW	(HRS) HIGH
16.	Report Scheduled by today department	Inspection scheduled for 6/9. However it does not show up to be printed out in, "Scheduled by today department."	Fix Report	Yes	San Leandro is using internal APO, where the property is stored directly in the Accela database (L3ADDRES, L3PARCEL, L3OWNER, etc.) rather than XAPO (GIS). We would want to validate that the search portlets in ACA and AA are successfully querying these tables, and this includes checking the portlets, FIDs, and System Switches in AA and the property search settings in ACA.	16	20
17.	Missing Clients	Client unable to pull up in Accela	Bug Fix	Yes	Effort will be less for this report than a new build because it has already been written and just needs some modifications. Scope will include business analysis, specifications for encroachment-related content that needs to be added, mock-up, revision to Crystal file, load within Accela Report Manager, unit testing, and user acceptance testing. Estimated hours will increase if it is determined that additional configuration and/or data migration is necessary to support revised report content.	6	10
18.	Permit error	Multiple Issues with this permit; Client unable to schedule with Accela, Kathy unable to schedule. Kathy's computer shows one inspection completed and fees paid. Jerome Smith Jr's computer was unable to schedule an inspection shows no inspections completed and fees unpaid.	Bug Fix	Yes	Without having looked at your examples, it sounds like this issue pertains to clients (assume this equates to licensed professionals) not being searchable within AA / ACA. We can look at your search portlets, FIDs, and reference/transactional data to get to the bottom of this.	N/A	N/A
19.	Inspection error	Inspection scheduling error message,	Bug Fix	Yes	Per call with San Leandro on 11/9/15, this has already been resolved.	4	12

21Tech Response:



#	TASK NAME	REQUIREMENT	TYPE	EX.	RESPONSE	(HRS) LOW	(HRS) HIGH
20.	Receipt error	Payment receipt number different when than report, example record payment receipt #73509 is #73510 when report is ran	Bug Fix	Yes	Please send over examples. Without knowing the details here, we would start by looking at the InspectionScheduleBefore (ISB) scripting, as well as the association of inspection types to inspection calendars, and the configuration of the calendars (inspection, blackout, and agency holiday) This could also be a FID related issue.	8	16
21.	Inspection scheduling	Accela will not schedule an inspection afterhours (such as a weekend).	Bug Fix	Yes	It sounds like this could be an error with the report logic where the receipt number is incrementing by 1. We can also verify that the sequence numbers are correct in the Accela database. It will take more time if it is a Database related issue.	4	8
22.	Website slow	program runs very slow one day and the next runs fine	Bug Fix	Yes	Your inspection calendars have inspection events and blackout events, and also leverage the agency holiday calendar. If you are trying to schedule inspections on a weeknight, weekend, nonworking day, etc., you can utilize the Supervisor Maintenance functionality within AA Calendar to set who can override the calendars / inspection availability so that these inspections can still be scheduled. 21Tech gave a presentation at this year's Accela Engage conference on inspection scheduling and calendaring, so we are very familiar with configuring these pieces. If the issue is not a blackout calendar it might also be FID related.	4	8

21Tech Response:



#	TASK NAME	REQUIREMENT	TYPE	EX.	RESPONSE	(HRS) LOW	(HRS) HIGH
23.	License numbers can't be changed	Auto populates license numbers for architects, engineering, contractors and program will not let you correct the number or unattached the professional from the record	Bug Fix	Yes	We will conduct an optimization analysis to see when/ where performance bottlenecks are occurring. While some things are out of your control being Accela-hosted, there are strategies that can be pursued to make intake, record display, scripting, reporting, etc. more efficient. The solution is cloud hosted and there might not be anything we can do but sometimes if you tell Accela where the issue is they can resolve it.	5	8
24.	Running reports errors	reports most of the time you get an error message	Bug Fix	Yes	Would like to see examples of this issue. Is the issue with the transactional and/ or reference licensed professionals? In regard to not being able to disassociate the professional from the record, you might want to look at FID 8446 (Disable Licensed Professionals Delete).	8	10
TOTAL HOURS						300	466

21Tech Response:



ADDITIONAL CONSIDERTAITONS

The items listed here are task that were spoke about as possible projects but not in the scope of this RFP, It is possible to estimate and add these Items on at a later date. We have added our team’s response to these general topics.

#	TASK NAME	REQUIREMENT	TYPE	EX.	RESPONSE	(HRS) LOW	(HRS) HIGH
A.	GIS Integration				Achieve integration with Esri GIS, including XAPO (external address-parcel-owner) model, auto-assignment of inspections by territory, proximity alerts, custom map services for cartography in AA, ACA, and AMO platforms, etc.		
B.	Set up sandbox				Install a local copy of the Civic Platform with an Oracle data dump from San Leandro's Accela PROD environment. This will be helpful for many reasons, including internal report writing. San Leandro is a SQL shop, and may want to consider going to on premise in the future, which would offer flexibility of SQL DB and SSRS for reporting.		

21Tech Response:





## ASSUMPTIONS

1. San Leandro's IT department will provide required and appropriate resources including subject matter experts (SMEs) to communicate business rules and requirements to support the proposed timeline.
2. 21Tech will document the requirements per the communication from SMEs and will deliver all documented requirements for approval or feedback. San Leandro's IT department will review the Requirements Document and within three (3) Business Days of receipt will deliver either:
  - a. Indicates that San Leandro's IT department has signed-off and accepted the Requirements Document; or
  - b. Identifies the areas of concern and provide the required feedback for requirements document update.
  - c. Requirements review will not take more than two review cycles.
3. San Leandro's IT department will provide required resources to support all tasks in the above timeline for environment setup, User Acceptance Testing and training.
4. All application development, test case creation, and testing will be based on signed-off requirements captured during requirements and Discovery and Analysis phase of the project.
5. Any changes after requirements sign-off will follow a change control process which will assess timeline, resource and cost impacts to the project.
6. All data clean up, business process re-engineering and User acceptance preparation and execution is San Leandro's IT department's responsibility.
7. All work such as (report deployment, server side changes, Java heap changes, etc.) Will have to involve Accela CRC because San Leandro is a cloud hosted site. It is necessary to have a current support agreement with Accela to perform these changes.

### 3. COSTS

#### COST

At the time of this “Soft RFP” we don’t have examples of each item on the list or technical requirements for the completed project so this “Soft RFP” is being approached as a Time and Materials project for the purpose of estimating an approximate total level of effort for the Items shown. 21Tech has provided a discounted Time and Materials rate of (140.00 per Hr.) based on the volume of work to be provided. It is the full intent of 21Tech to provide an accurate estimate with the information supplied; but with limited access to samples and to the system in question, our team has provided a Time and Materials range. On our Time and Materials arrangements our team will examine a specific requirement and provide San Leandro with an estimate before starting work on a given issue.

DESCRIPTION	HRS.	RATE	AMT
Total hours for listed Request Items – Low Estimate	300	\$140	\$42,000
Total hours for listed Request Items – High Estimate	466	\$140	\$65,240

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Project Manager: Anton Batalla

Date: July 18, 2016

Contractor/Consultant/Vendor: 21Tech, LLC

Project Number: Contract Amount: \$ 85,000.00

Project Description: Purchase of hardware through WSCA contract; installation services to configure upgraded network hardware.

Notice: Purchases of goods or contracting for services over \$5,000 without obtaining at least three (3) quotes is a violation of City policy unless justified on one or more of the bases below. The City's formal bidding process will normally apply to purchases over \$25,000.

Attach Requisition Form for Signature Approval

JUSTIFICATION FOR AWARD OF SOLE SOURCE CONTRACT

- Emergency PO request. Need for the service is of such an unusual and compelling urgency that the City of San Leandro would be seriously injured unless it is permitted to limit the number of sources from which it solicits bids or proposals. This justification is not met on the basis of a lack of planning.
Staff solicited competitive bids and was unable to obtain three quotes from responsive vendors - Attach sheet with company names, contact names and phone numbers of vendors contacted
The service/product is only available from a single source and there is no acceptable substitute
The item is directly procured from the original manufacturer and that supplier is the only source for such item
Only one vendor can meet the necessary delivery date of
Only one (1) Contractor/Consultant/Vendor who can provide unique/highly specialized item/ service
[X] Economy or efficiency supports award to existing contractor/consultant as a logical follow-on to work already in progress under a competitively awarded contract
Cost to prepare for a competitive procurement exceeds the cost of the work or item
The item is an integral repair part or accessory compatible with existing equipment
The item or service is essential in maintaining research or operational continuity
The item/service is one with which staff members who will use the item/service have specialized training and/or expertise and retraining would incur substantial cost in time and/or money

EXPLANATION:

The City has contracted with the proposed vendor in the past and they are very familiar with the current network topology throughout the City. Given this history, and the overall quality and completeness of their proposal, which met all of the City's requirements, it has been decided to award the professional services portion of this contract (totaling \$22,520.00 per Exhibit B) as a sole-source to Strategic Products and Services, LLC.

REQUESTOR SIGNATURE



# City of San Leandro

Meeting Date: July 18, 2016

## Resolution - Council

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**File Number:** 16-367 **Agenda Section:** CONSENT CALENDAR

**Agenda Number:**

**TO:** City Council

**FROM:** Chris Zapata  
City Manager

**BY:** Jeff Kay  
Acting Assistant City Manager

**FINANCE REVIEW:** David Baum  
Finance Director

**TITLE:** RESOLUTION Approving the Non-Professional Services Agreement Between the City of San Leandro and 21-Tech LLC (approves agreement for technical support of Accela permit system in an amount not to exceed \$85,000)

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RESOLUTION Making a Sole Source Justification and Approving the Non-professional Services Agreement Between the City of San Leandro and 21Tech, LLC (approves one purchase totaling \$85,000.00)

WHEREAS, an agreement between the City of San Leandro and 21Tech, LLC has been presented to this City Council; and

WHEREAS, the City Council finds that in order to match work already done on an existing public project, it is necessary to award the work as a sole source contract, in accordance with California Public Contract Code section 3400(c)(2); and

WHEREAS, the City Council is familiar with the contents thereof; and

WHEREAS, the City Manager recommends approval of said agreement.

NOW, THEREFORE, the City Council of the City of San Leandro does RESOLVE as follows:

That said agreement with 21Tech, LLC in the amount of \$85,000.00 is hereby approved and execution by the City Manager is hereby authorized; and

That a sole source contract is justified in this instance because the work proposed is necessary to match work on an existing public project, in accordance with California Public Contract Code section 3400(c)(2); and

That the amount of \$85,000.00 from the Information Technology Fund account 688-13-121-7410 is hereby authorized to purchase said agreement.

