



Agenda Item No: 4.c
Meeting Date: June 15, 2020

SAN RAFAEL CITY COUNCIL AGENDA REPORT

Department: Community Development
Paul A. Jensen
Prepared by: Paul Jensen (EG)
Community Development Director

City Manager Approval: *AS*

TOPIC: PROFESSIONAL SERVICE AGREEMENT FOR PERMIT MANAGEMENT SYSTEM

SUBJECT: RESOLUTION AUTHORIZING THE CITY MANAGER TO EXECUTE AN AGREEMENT FOR PROFESSIONAL SERVICES WITH CAMINO TECHNOLOGY SOLUTIONS, INC. TO DEVELOP A PERMIT MANAGEMENT SYSTEM, WITH A THREE-YEAR TERM FOR A CONTRACT AMOUNT NOT TO EXCEED TO \$175,000

RECOMMENDATION:
Adopt Resolution.

BACKGROUND:
On September 16, 2019 the City Council adopted [Resolution 14725](#) endorsing and authorizing the filing of applications for the Senate Bill 2 (SB2) Planning Grants Program (PGP), through which the City of San Rafael has been allocated a total of \$310,000.

The purpose of the PGP is to provide financial and technical assistance to local governments to update planning documents to:

- Accelerate housing production;
- Streamline the approval of housing development;
- Facilitate housing affordability;
- Promote the development of housing; and
- Ensure geographic equity in the distribution and expenditure of allocated funds

As part of our PGP application, Staff identified the development of a Permit Management System as one project to utilize these funds in order to facilitate future housing development in the identified SB2 Priority Policy Areas. On February 21, 2020, the City’s PGP application was accepted and the State’s Standard Agreement ([Agreement# 19-PGP-13385](#)) was executed authorizing proceeding on projects.

ANALYSIS:

_____ **FOR CITY CLERK ONLY** _____

File No.: _____
Council Meeting: _____
Disposition: _____

As part of the project, Staff will build out a series of innovative enhancements to the City's permitting and approvals process that will make housing and mixed-use development easier. This project will develop a web-based permit management system to streamline approvals for Planning, Building, and Code Enforcement Division projects. This project is structured in four (4) phases. Each phase will focus on specific technology functionality, allowing staff and Camino to design and test the system to meet our needs.

The permit management system will include functionality such as tracking applications, code enforcement cases, coordinating plan reviews, recording fees, issuing violations and fines, and scheduling inspections. Key Functionality of this system will include: online permit process for applicants, automated permit issuance (API), platform-based solution with an open developer API, and AI-driven reporting and insights.

Staff is recommending that the City enter into a Professional Services Agreement (PSA) with Camino Technology Solutions, Inc. (Camino) to develop the permit management system. The City has partnered with Camino on several other City projects including our online cannabis permitting system, our online building permit guide, and a virtual inspection system currently being tested by City inspectors.

Additionally, Camino is early in the process of completing a new Permit Management System software. Partnering with Camino as the system is being developed greatly reduces the costs and provides the City a unique opportunity to influence the design of this software to meet the City's specific business and permitting processes.

The purpose of the three-year term for this project is to align the project with the PGP grants funding the project. The intent of this project is to launch a "minimum viable product" (MVP) within the first year, and the continue to improve and build functionality over the remaining contract term.

FISCAL IMPACT:

The PGP grant is funding the \$175,000 for the professional services agreement to develop a Permit Management System. Therefore, there is no fiscal impact to the City's general fund for the FY 20-21.

OPTIONS:

The City Council has the following options to consider regarding this matter:

1. Adopt Resolution approving the PSA with Camino;
2. Adopt Resolution with Modifications; or
3. Request additional information; or
4. Take no action.

RECOMMENDED ACTION:

Adopt Resolution

ATTACHMENTS:

1. Resolution
2. Agreement for Professional Services with Camino Technology Solutions, Inc. for Development of a Permit Management System, with attached Exhibit A: Scope of Work for Camino- San Rafael Permit Management System

RESOLUTION NO.

RESOLUTION OF THE SAN RAFAEL CITY COUNCIL AUTHORIZING THE CITY MANAGER TO EXECUTE AN AGREEMENT FOR PROFESSIONAL SERVICES WITH CAMINO TECHNOLOGY SOLUTIONS, INC. TO DEVELOP A PERMIT MANAGEMENT SYSTEM, WITH A THREE-YEAR TERM FOR A CONTRACT AMOUNT NOT TO EXCEED \$175,000

(Term of Agreement: from June 15, 2020 to June 14, 2023)

WHEREAS, on October 30, 2019, the City of San Rafael was awarded a Senate Bill 2 Planning Grant in the amount \$310,000 and \$175,000 of the total grant amount was allocated for the development of a “Permit Management System”; and

WHEREAS, Phase 1 of the Permit Management System project, focusing on creating process maps of existing permit business processes, is currently underway through a Professional Service Agreement with Lalo Consulting, LLC; and

WHEREAS, Camino Technology Solutions, Inc. (“Camino”) has extensive experience working with the City developing information systems for Community Development permit management; and

WHEREAS, the City has grant funding to cover this Agreement; and

WHEREAS, the City and Camino will continue to pursue additional funding opportunities to cover these remaining expenses during the first eighteen months of this Agreement;

NOW, THEREFORE, BE IT RESOLVED, that the City Council of the City of San Rafael hereby authorizes the City Manager to sign a Professional Services Agreement with Camino Technology Solutions, Inc. in a form approved by the City Attorney, to develop a Permit Management System, three-year term from June 15, 2020 to June 14, 2023, and for a contract amount not to exceed \$175,000.

I, LINDSAY LARA, Clerk of the City of San Rafael, hereby certify that the foregoing resolution was duly and regularly introduced and adopted at a regular meeting of the City Council of said City held on Monday, the 15th day of June 2020, by the following vote, to wit:

AYES: COUNCILMEMBERS:

NOES: COUNCILMEMBERS:

ABSENT: COUNCILMEMBERS:

LINDSAY LARA, City Clerk

**AGREEMENT FOR PROFESSIONAL SERVICES
FOR DEVELOPMENT OF A PERMIT MANAGEMENT SYSTEM**

This Agreement is made and entered into this _____ day of _____, 2020, by and between the CITY OF SAN RAFAEL (hereinafter "**CITY**"), and CAMINO TECHNOLOGY SOLUTIONS, INC. (hereinafter "**CONTRACTOR**").

RECITALS

WHEREAS, on October 30, 2019, the City of San Rafael was awarded a Senate Bill 2 Planning Grant in the amount \$310,000 and \$175,000 of the total grant amount was allocated for the development of a "Permit Management System" for the Community Development Department; and

WHEREAS, Phase 1 of the "Permit Management System" project focusing on creating process maps of existing permit business processes is currently underway through a Professional Service Agreement with Lalo Consulting, LLC; and

WHEREAS, the **CONTRACTOR** has extensive experience working with the **CITY** developing information systems for Community Development permit management; and

WHEREAS, the **CITY** has grant funding to cover the first eighteen months of this Agreement representing expenses totalling \$130,000; and

WHEREAS, the **CITY** will have sufficient funding in the general fund after the first eighteen months of this Agreement to cover the remaining \$45,000 in expenses related to this Agreement; and

WHEREAS, the **CITY** and **CONTRACTOR** will continue to pursue additional funding opportunities to cover these remaining expenses during the first eighteen months of this Agreement; and

AGREEMENT

NOW, THEREFORE, the parties hereby agree as follows:

1. **PROJECT COORDINATION.**

A. **CITY'S Project Manager.** The Community Development Department Principal Analyst, Ethan Guy, is hereby designated the PROJECT MANAGER for the **CITY**, and said PROJECT MANAGER shall supervise all aspects of the progress and execution of this Agreement.

B. **CONTRACTOR'S Project Director.** **CONTRACTOR** shall assign a single

PROJECT DIRECTOR to have overall responsibility for the progress and execution of this Agreement for **CONTRACTOR**. Nate Levine is hereby designated as the PROJECT DIRECTOR for **CONTRACTOR**. Should circumstances or conditions subsequent to the execution of this Agreement require a substitute PROJECT DIRECTOR, for any reason, the **CONTRACTOR** shall notify the **CITY** within ten (10) business days of the substitution.

2. DUTIES OF CONTRACTOR.

CONTRACTOR shall perform the duties and provide process mapping services as described in Exhibit A attached and incorporated herein by reference. By mutual agreement of the PROJECT MANAGER and PROJECT DIRECTOR, confirmed in writing, the scope of work described in Exhibit A may be adjusted as necessary to achieve the **CITY'S** desired outcome.

3. DUTIES OF CITY.

CITY shall pay the compensation as provided in Paragraph 4, and shall provide **CONTRACTOR** with access to staff and information necessary for **CONTRACTOR** to perform the services required by this Agreement.

4. COMPENSATION.

For the full performance of the services described herein by **CONTRACTOR**, **CITY** shall pay **CONTRACTOR** for the services and deliverables described in Exhibit A hereto, provided that in no event shall the total compensation paid to **CONTRACTOR** pursuant to this Agreement exceed One Hundred Seventy-Five Thousand Dollars (\$175,000).

Payment will be made in up to four individual installments in amounts up to \$43,750 corresponding to the "Phases" described in Exhibit A.

Payment will be made upon receipt by PROJECT MANAGER of itemized invoices submitted by **CONTRACTOR**.

5. TERM OF AGREEMENT.

The term of this Agreement shall be for three (3) years commencing on June 15th, 2020 and ending on June 14th, 2023. Upon mutual agreement of the parties, and subject to the approval of the City Manager the term of this Agreement may be extended for an additional period of up to one (1) year.

6. TERMINATION.

A. **Discretionary.** The City may terminate this Agreement following "Phase 1" or "Phase 3" as described in Exhibit A.

B. **Cause.** Either party may terminate this Agreement for cause upon fifteen (15)

days written notice mailed or personally delivered to the other party, and the notified party's failure to cure or correct the cause of the termination, to the reasonable satisfaction of the party giving such notice, within such fifteen (15) day time period.

C. **Effect of Termination.** Upon receipt of notice of termination, neither party shall incur additional obligations under any provision of this Agreement without the prior written consent of the other.

D. **Return of Documents.** Upon termination, any and all **CITY** documents or materials provided to **CONTRACTOR** and any and all of **CONTRACTOR's** documents and materials prepared for or relating to the performance of its duties under this Agreement, shall be delivered to **CITY** as soon as possible, but not later than thirty (30) days after termination.

7. OWNERSHIP OF DOCUMENTS.

The written documents and materials prepared by the **CONTRACTOR** in connection with the performance of its duties under this Agreement, shall be the sole property of **CITY**. **CITY** may use said property for any purpose, including projects not contemplated by this Agreement.

8. INSPECTION AND AUDIT.

Upon reasonable notice, **CONTRACTOR** shall make available to **CITY**, or its agent, for inspection and audit, all documents and materials maintained by **CONTRACTOR** in connection with its performance of its duties under this Agreement. **CONTRACTOR** shall fully cooperate with **CITY** or its agent in any such audit or inspection.

9. ASSIGNABILITY.

The parties agree that they shall not assign or transfer any interest in this Agreement nor the performance of any of their respective obligations hereunder, without the prior written consent of the other party, and any attempt to so assign this Agreement or any rights, duties or obligations arising hereunder shall be void and of no effect.

10. INSURANCE.

A. **Scope of Coverage.** During the term of this Agreement, **CONTRACTOR** shall maintain, at no expense to **CITY**, the following insurance policies:

1. A commercial general liability insurance policy in the minimum amount of one million dollars (\$1,000,000) per occurrence/two million dollars (\$2,000,000) aggregate, for death, bodily injury, personal injury, or property damage.

2. An automobile liability (owned, non-owned, and hired vehicles) insurance policy in the minimum amount of one million dollars (\$1,000,000) dollars per occurrence.

3. If any licensed professional performs any of the services required to be performed under this Agreement, a professional liability insurance policy in the minimum amount of one million dollars (\$1,000,000) per occurrence/two million dollars (\$2,000,000) aggregate, to cover any claims arising out of the **CONTRACTOR'S** performance of services under this Agreement. Where **CONTRACTOR** is a professional not required to have a professional license, **CITY** reserves the right to require **CONTRACTOR** to provide professional liability insurance pursuant to this section.

4. If it employs any person, **CONTRACTOR** shall maintain worker's compensation insurance, as required by the State of California, with statutory limits, and employer's liability insurance with limits of no less than one million dollars (\$1,000,000) per accident for bodily injury or disease. **CONTRACTOR'S** worker's compensation insurance shall be specifically endorsed to waive any right of subrogation against **CITY**.

B. Other Insurance Requirements. The insurance coverage required of the **CONTRACTOR** in subparagraph A of this section above shall also meet the following requirements:

1. Except for professional liability insurance or worker's compensation insurance, the insurance policies shall be specifically endorsed to include the **CITY**, its officers, agents, employees, and volunteers, as additional insureds (for both ongoing and completed operations) under the policies.

2. The additional insured coverage under **CONTRACTOR'S** insurance policies shall be "primary and non contributory" with respect to any insurance or coverage maintained by **CITY** and shall not call upon **CITY'S** insurance or self-insurance coverage for any contribution. The "primary and noncontributory" coverage in **CONTRACTOR'S** policies shall be at least as broad as ISO form CG20 01 04 13.

3. Except for professional liability insurance or worker's compensation insurance, the insurance policies shall include, in their text or by endorsement, coverage for contractual liability and personal injury.

4. By execution of this Agreement, **CONTRACTOR** hereby grants to **CITY** a waiver of any right to subrogation which any insurer of **CONTRACTOR** may acquire against **CITY** by virtue of the payment of any loss under such insurance. **CONTRACTOR** agrees to obtain any endorsement that may be necessary to effect this waiver of subrogation, but this provision applies regardless of whether or not **CITY** has received a waiver of subrogation endorsement from the insurer.

5. If the insurance is written on a Claims Made Form, then, following termination of this Agreement, said insurance coverage shall survive for a period of not less than five years.

6. The insurance policies shall provide for a retroactive date of placement

coinciding with the effective date of this Agreement.

7. The limits of insurance required in this Agreement may be satisfied by a combination of primary and umbrella or excess insurance. Any umbrella or excess insurance shall contain or be endorsed to contain a provision that such coverage shall also apply on a primary and noncontributory basis for the benefit of **CITY** (if agreed to in a written contract or agreement) before **CITY'S** own insurance or self-insurance shall be called upon to protect it as a named insured.

8. It shall be a requirement under this Agreement that any available insurance proceeds broader than or in excess of the specified minimum insurance coverage requirements and/or limits shall be available to CITY or any other additional insured party. Furthermore, the requirements for coverage and limits shall be: (1) the minimum coverage and limits specified in this Agreement; or (2) the broader coverage and maximum limits of coverage of any insurance policy or proceeds available to the named insured; whichever is greater. No representation is made that the minimum Insurance requirements of this agreement are sufficient to cover the obligations of the **CONTRACTOR** under this agreement.

C. **Deductibles and SIR's.** Any deductibles or self-insured retentions in **CONTRACTOR's** insurance policies must be declared to and approved by the PROJECT MANAGER and City Attorney, and shall not reduce the limits of liability. Policies containing any self-insured retention (SIR) provision shall provide or be endorsed to provide that the SIR may be satisfied by either the named insured or **CITY** or other additional insured party. At **CITY's** option, the deductibles or self-insured retentions with respect to **CITY** shall be reduced or eliminated to **CITY's** satisfaction, or **CONTRACTOR** shall procure a bond guaranteeing payment of losses and related investigations, claims administration, attorney's fees and defense expenses.

D. **Proof of Insurance.** **CONTRACTOR** shall provide to the PROJECT MANAGER or **CITY'S** City Attorney all of the following: (1) Certificates of Insurance evidencing the insurance coverage required in this Agreement; (2) a copy of the policy declaration page and/or endorsement page listing all policy endorsements for the commercial general liability policy, and (3) excerpts of policy language or specific endorsements evidencing the other insurance requirements set forth in this Agreement. **CITY** reserves the right to obtain a full certified copy of any insurance policy and endorsements from **CONTRACTOR**. Failure to exercise this right shall not constitute a waiver of the right to exercise it later. The insurance shall be approved as to form and sufficiency by PROJECT MANAGER and the City Attorney.

11. INDEMNIFICATION.

A. Except as otherwise provided in Paragraph B., **CONTRACTOR** shall, to the fullest extent permitted by law, indemnify, release, defend with counsel approved by **CITY**, and hold harmless **CITY**, its officers, agents, employees and volunteers (collectively, the "**City Indemnitees**"), from and against any claim, demand, suit,

judgment, loss, liability or expense of any kind, including but not limited to attorney's fees, expert fees and all other costs and fees of litigation, (collectively "CLAIMS"), arising out of **CONTRACTOR'S** performance of its obligations or conduct of its operations under this Agreement. The **CONTRACTOR's** obligations apply regardless of whether or not a liability is caused or contributed to by the active or passive negligence of the **City Indemnitees**. However, to the extent that liability is caused by the active negligence or willful misconduct of the **City Indemnitees**, the **CONTRACTOR's** indemnification obligation shall be reduced in proportion to the **City Indemnitees'** share of liability for the active negligence or willful misconduct. In addition, the acceptance or approval of the **CONTRACTOR's** work or work product by the **CITY** or any of its directors, officers or employees shall not relieve or reduce the **CONTRACTOR's** indemnification obligations. In the event the **City Indemnitees** are made a party to any action, lawsuit, or other adversarial proceeding arising from **CONTRACTOR'S** performance of or operations under this Agreement, **CONTRACTOR** shall provide a defense to the **City Indemnitees** or at **CITY'S** option reimburse the **City Indemnitees** their costs of defense, including reasonable attorneys' fees, incurred in defense of such claims.

B. Where the services to be provided by **CONTRACTOR** under this Agreement are design professional services to be performed by a design professional as that term is defined under Civil Code Section 2782.8, then, to the extent permitted by law including without limitation, Civil Code sections 2782, 2782.6 and 2782.8, **CONTRACTOR** shall indemnify and hold harmless the **CITY** and its officers, officials, and employees (collectively **City Indemnitees**) from and against damages, liabilities or costs (including incidental damages, Court costs, reasonable attorney's fees as may be determined by the Court, litigation expenses and fees of expert witnesses incurred in connection therewith and costs of investigation) to the extent they are caused by the negligence, recklessness, or willful misconduct of **CONTRACTOR**, or any subconsultants, or subcontractor or anyone directly or indirectly employed by them, or anyone for whom they are legally liable (collectively Liabilities). Such obligation to hold harmless and indemnify any indemnity shall not apply to the extent that such Liabilities are caused in part by the negligence or willful misconduct of such City Indemnitee.

C. Notwithstanding anything to the contrary in this Agreement, the Parties agree that the defense and indemnification obligations of this Agreement shall be limited to the amount of the insurance coverage required by this Agreement; however such obligations shall apply whether or not **CONTRACTOR** has in fact maintained the required insurance in effect during the term of this Agreement, and shall survive the termination or completion of this Agreement for the full period of time allowed by law.

12. NONDISCRIMINATION.

CONTRACTOR shall not discriminate, in any way, against any person on the basis of age, sex, race, color, religion, ancestry, national origin or disability in connection with or related to the performance of its duties and obligations under this Agreement.

13. COMPLIANCE WITH ALL LAWS.

CONTRACTOR shall observe and comply with all applicable federal, state and local laws, ordinances, codes and regulations, in the performance of its duties and obligations under this Agreement. **CONTRACTOR** shall perform all services under this Agreement in accordance with these laws, ordinances, codes and regulations. **CONTRACTOR** shall release, defend, indemnify and hold harmless **CITY**, its officers, agents and employees from any and all damages, liabilities, penalties, fines and all other consequences from any noncompliance or violation of any laws, ordinances, codes or regulations.

14. NO THIRD PARTY BENEFICIARIES.

CITY and **CONTRACTOR** do not intend, by any provision of this Agreement, to create in any third party, any benefit or right owed by one party, under the terms and conditions of this Agreement, to the other party.

15. NOTICES.

All notices and other communications required or permitted to be given under this Agreement, including any notice of change of address, shall be in writing and given by personal delivery, or deposited with the United States Postal Service, postage prepaid, addressed to the parties intended to be notified. Notice shall be deemed given as of the date of personal delivery, or if mailed, upon the date of deposit with the United States Postal Service. Notice shall be given as follows:

TO CITY 's Project Manager:	Ethan Guy City of San Rafael 1400 Fifth Avenue P.O. Box 151560 San Rafael, CA 94915-1560
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TO CONTRACTOR 's Project Director:	Nate Levine 122 2nd Ave, Suite 200 San Mateo, CA 94401
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16. INDEPENDENT CONTRACTOR.

For the purposes, and for the duration, of this Agreement, **CONTRACTOR**, its officers, agents and employees shall act in the capacity of an Independent Contractor, and not as employees of the **CITY**. **CONTRACTOR** and **CITY** expressly intend and agree that the status of **CONTRACTOR**, its officers, agents and employees be that of an Independent Contractor and not that of an employee of **CITY**.

17. ENTIRE AGREEMENT -- AMENDMENTS.

A. The terms and conditions of this Agreement, all exhibits attached, and all

documents expressly incorporated by reference, represent the entire Agreement of the parties with respect to the subject matter of this Agreement.

B. This written Agreement shall supersede any and all prior agreements, oral or written, regarding the subject matter between the **CONTRACTOR** and the **CITY**.

C. No other agreement, promise or statement, written or oral, relating to the subject matter of this Agreement, shall be valid or binding, except by way of a written amendment to this Agreement.

D. The terms and conditions of this Agreement shall not be altered or modified except by a written amendment to this Agreement signed by the **CONTRACTOR** and the **CITY**.

E. If any conflicts arise between the terms and conditions of this Agreement, and the terms and conditions of the attached exhibits or the documents expressly incorporated by reference, the terms and conditions of this Agreement shall control.

18. SET-OFF AGAINST DEBTS.

CONTRACTOR agrees that **CITY** may deduct from any payment due to **CONTRACTOR** under this Agreement, any monies which **CONTRACTOR** owes **CITY** under any ordinance, agreement, contract or resolution for any unpaid taxes, fees, licenses, assessments, unpaid checks or other amounts.

19. WAIVERS.

The waiver by either party of any breach or violation of any term, covenant or condition of this Agreement, or of any ordinance, law or regulation, shall not be deemed to be a waiver of any other term, covenant, condition, ordinance, law or regulation, or of any subsequent breach or violation of the same or other term, covenant, condition, ordinance, law or regulation. The subsequent acceptance by either party of any fee, performance, or other consideration which may become due or owing under this Agreement, shall not be deemed to be a waiver of any preceding breach or violation by the other party of any term, condition, covenant of this Agreement or any applicable law, ordinance or regulation.

20. COSTS AND ATTORNEY'S FEES.

The prevailing party in any action brought to enforce the terms and conditions of this Agreement, or arising out of the performance of this Agreement, may recover its reasonable costs (including claims administration) and attorney's fees expended in connection with such action.

21. CITY BUSINESS LICENSE / OTHER TAXES.

CONTRACTOR shall obtain and maintain during the duration of this Agreement, a

CITY business license as required by the San Rafael Municipal Code **CONTRACTOR** shall pay any and all state and federal taxes and any other applicable taxes. **CITY** shall not be required to pay for any work performed under this Agreement, until **CONTRACTOR** has provided **CITY** with a completed Internal Revenue Service Form W-9 (Request for Taxpayer Identification Number and Certification).

22. SURVIVAL OF TERMS.

Any terms of this Agreement that by their nature extend beyond the term (or termination) of this Agreement shall remain in effect until fulfilled, and shall apply to both Parties' respective successors and assigns.

23. APPLICABLE LAW.

The laws of the State of California shall govern this Agreement.

24. COUNTERPARTS AND ELECTRONIC SIGNATURE.

This Agreement may be executed in any number of counterparts, each of which shall be deemed an original, but all of which together shall constitute one document. Counterpart signature pages may be delivered by telecopier, email or other means of electronic transmission.

IN WITNESS WHEREOF, the parties have executed this Agreement as of the day, month and year first above written.

CITY OF SAN RAFAEL

JIM SCHUTZ, City Manager

ATTEST:

LINDSAY LARA, City Clerk

APPROVED AS TO FORM:

ROBERT F. EPSTEIN, City Attorney

CONTRACTOR

By: _____

E9990E340E53481...

Name: _____
Nate Levine

Title: _____
Chief Strategy Officer

[If Contractor is a corporation, add signature of second corporate officer]

By: _____

11270705E530439...

Name: _____
Mike Rosengarten

Title: _____
Chief Executive Officer

Scope of Work

Camino – San Rafael Permit Management System Project

Section 1) Overview

The City of San Rafael is looking to build out a series of innovative enhancements to our permitting and approvals process that will make housing and mixed-use development easier. The City of San Rafael is seeking a web-based permit management system to streamline approvals for Planning, Building, and Code Enforcement Division projects. To assist in the development of this system, the City will be partnering with Camino, a civic technology development company. The permit management system will be used for core operations such as tracking applications, code enforcement cases, coordinating plan reviews, recording fees, issuing violations and fines, and scheduling inspections. Key Functionality of this system will include:

- An entirely online permit process for applicants. Currently parts of the City's permitting process are available online, however functionality is limited. A new system will allow applicants to apply for every project, track project status, communicate with reviewers, and schedule inspections entirely online. This will lower the barrier for applicants who today may be required to come in-person to city hall during business hours. It will also allow inspectors and staff to access all functionality of the new system in-the-field
- Automated permit issuance. For certain types of permits, the City will allow applicants to apply for and receive permits without staff involvement. The City will rely on the software to validate that required regulations are being complied with. This will allow applicants to pull permits on holidays, weekends, and after-hours, regardless of staff availability, freeing up staff time and expediting review of more complex projects.
- Platform-based solution with an open developer API. The City's current system does not offer an easy interface for connecting other software solutions. This limits staff's ability to upgrade infrastructure. For example, the City will explore moving the city to Electronic Plan Review which will offer lower costs and convenience for applicants, and a faster review process for staff. However, without easy API integration a switch to Electronic Review will not be possible.
- Reporting. The City's current system only provides a limited number of reports regarding permit types, number of permits, and permit status. Developing new reports and performing additional analysis is often complex and time intensive. A new system would be developed to provide real-time reporting on trends and analysis with an easily customizable and user friendly interface. Reporting functionality will also be developed to streamline local, regional, and state reporting requirements like annual Housing Element Updates, Regional Housing Need Allocations, and housing develop tied to specific funding sources (i.e. SB2, SB3, CDBG, and HOME). As the data becomes more

EXHIBIT A

robust, the new system will utilize AI-Driven reporting to identify trends and develop more accurate and nuanced reports.

Section 2) Budget

The total budget for this project shall not exceed \$175,000. The City has secured a SB2 Planning Grant funding to cover approximately 75% of the development of this system. The scope of work outlined below is broken into four phases, the first three of which will be covered by the grant. The final phase will be completed if there is funding available at the end of the third phase.

Not included within this SOW are ongoing Software as a Service (SaaS) subscription costs if the City decides to adopt the Camino Permit Management System and the completion of this project.

Section 3) Description of Phases

The following Phases outline the planned scope of work and deliverables over the lifetime of this project. Following the completion of each Phase the City and Camino will agree upon the scope of work to be covered during the next Phase. The agreed upon scope of work will be finalized upon written confirmation by the City.

At the end of Phase 1 and Phase 3, the City reserves the right to terminate the remaining Scope of Work and end the contract without any further payments.

Phase 1: 6 Months

Summary

Phase 1 is considered to be a 'pilot phase'. The goal of this pilot is to give the City an opportunity to test Camino software and determine if Camino is a good partner for the City's needs. Before embarking on any development work, the City and Camino will agree upon a single (or small set of) permit type(s) to focus on. It is important that the area of focus be manageable with the functionality outlined below in Software Deliverables for Phase 1 (as this is the functionality Camino feels confident delivering in the next six months). Camino will work with the City and its consultant to examine current workflows and select a good candidate.

Once a permit type is selected, Camino will aim to have a prototype configured within one month. City staff will be provided with training content (manuals, videos, and knowledge base) and invited to test the configuration and provide feedback. The remaining five months will be reserved for making improvements or enhancements based on staff feedback.

EXHIBIT A

Camino's goal will be to launch at least one live workflow for the pilot with the City during Phase 1. Based on feedback from staff users and applicants, the City can decide whether to proceed with Phases 2 and 3.

Software Deliverables

- Applicant Portal V1
 - Create and manage account, view existing Submissions and create new Submissions.
 - Use a wizard-like guided application process driven by GIS queries and a survey.
 - Applicant is presented with an interactive checklist of application steps.
 - Upload digital files, fill out forms, and pay fees via credit card or in-person payment.
 - Check their application status and view uploaded documents and payment history.
 - Schedule inspections using a digital calendar.
 - Send messages to the agency.
- Submission Lookup
 - Search for a submission by name, address, or project type.
 - Create custom, filtered views of submissions.
 - View and lookup filtered map views of submissions.
- Submission Management V1
 - View all submission details and associated data fields. Staff can add and remove data fields and update values.
 - View all tasks and steps on a Submission. Staff can add and remove steps.
 - View all documents attached to a submission. Staff can add and remove documents.
 - View pending and completed payments on a submission. Staff can
 - View related activity and other submissions at the same location
 - View a log of all activities that have occurred on the submission.
 - Manually update the status of a submission.
- Task Management
 - Assign or reassign tasks to a staff user. User is notified via email.
 - Each user can view a list of all tasks assigned to them. Managers can view and assign unassigned tasks.
 - Create groups of users and assign tasks to a group.
- Inspections V1
 - Set a fixed inspection calendar for each inspection type.
 - Inspectors can confirm or change requested inspections.
 - Attach files or images to an inspection task. Leave notes or send a message to the applicant.
 - Mark inspections as passed or failed. Failed inspections can be re-added.
 - View all scheduled inspections on a calendar view.
 - Perform inspections remotely via smart phone.

EXHIBIT A

- Messaging V1
 - Send and receive chat messages on any workflow step.
 - Automatic email notifications when a message is sent.
- Document Generation V1
 - Upload PDF template and overlay data fields.
 - Generate auto-filled PDF documents on a submission.
 - Documents are stored on the submission and emailed to the applicant.
- Workflow V1
 - Simple linear workflow that activates tasks as earlier tasks are completed.
 - Customize workflow phases.
 - Automatic assignment of tasks as they are activated.
- Alerts and Notifications
 - Specify staff users who should be notified when a new submission is created, based on project type.
 - Applicant receives notifications when there are updates to their submission.
- Financial Report Generation
 - View a filtered list of pending and complete financial transactions.
 - Export list as a CSV file.
- Configuration Engine
 - Configure tree of Project Types.
 - Configure library of workflow steps.
 - Configure rules between Project Types and Steps.
 - Configure data fields and fee formulas.
 - Create forms from data fields or with PDF template.

Service Deliverables

- Configure workflow for pilot permit type(s), including tasks, fees, and forms.
- Create accounts for staff users.
- Train group of staff evaluators on how to use Camino system.
- Assist with launch of pilot portal.
- Customer support for staff and public users.

Phase 2: 6 Months

Summary

The goal of this phase is to expand from a pilot to an initial version of a production permit system that incorporates staff and applicant feedback. The software deliverables below are our best guess of what will be high priority items, but the specific list should evolve based on usage. This phase will not replace TRAKIT, but should have enough sophistication to handle any single permit workflow for the City.

Software Deliverables

- Submission Management V2

EXHIBIT A

- Enhance Submission view UX and UI based on feedback from staff users during Phase 1.
 - Place a Hold on a Submission that prevents further work.
- Finance System Integration
 - Tie fee formulas to GL codes.
 - Automatically export transaction data to City's financial system.
- Parcel Management V1
 - Look up a parcel and view GIS attributes along with Submission activity.
 - Edit and add GIS attributes on a parcel.
 - Add flags or holds on a parcel.
- User Management V1
 - Associate data fields with a user that can be automatically populated on future submissions.
 - Look up an applicant and view associated data fields and submission activity.
- Task Management V2
 - Assign a task to multiple users who need to sign off or review.
 - Custom statuses for tasks (pass/fail etc).
- Inspections V2
 - Inspectors can create an inspection checklist for each inspection type.
 - Each inspector can set their own calendar.
 - Caps on inspections by day/type.
 - Basic Management Reporting around Tasks and Staff.
- Mobile Interface V1
 - Applicants can navigate Guide and submit an application on mobile.
 - Staff can lookup submissions and manage tasks on mobile.
- Canned Messages and Responses
 - Maintain a list of pre-written messages and responses.
 - Pull from list when adding comments and notes.

Service Deliverables

- Configure additional permit types at City's discretion.
- Continued customer support for staff and public users.
- Integrate Camino with City's financial system.

Phase 3: 6 Months

Summary

The goal of Phase 3 is to complete the core functionality of a permit management system, with a specific focus on completing critical integrations. The product at the end of Phase 3 will at least be at parity with PermitTRAK. Phase 4 will add functionality to enhance the core permit system and/or explore innovative ideas.

Software Deliverables

EXHIBIT A

- Reporting
 - Automated production of 10 key reports for staff.
- Eplan Integration
 - Integrate Camino with an electronic plan review system like EPlanSoft or BlueBeam.
 - Plans submitted to Camino are viewable for markup in the Eplan system.
 - Marked up plans and comments are transferred back to Camino and available to the applicant.
- CSLB Integration
 - Check contractor licenses automatically against the CSLB.
- Real-time GIS integration
 - Update GIS data in Camino on an automatic, scheduled basis by pulling from City GIS system.
- Multiple External Roles on a Submission
 - The applicant can attach additional users (ie homeowner, electrician) to their submission.
 - Application and tasks can be completed by, and assigned to, different external users.
- Link multiple Submissions
 - Allow for multiple submissions that are part of the same project to be linked together.
- Workflow V2
 - Non-linear workflow – can return to earlier steps/phases or skip steps.
 - Parallel workflows – ie these three steps must be completed before step four can happen.
- Custom Views and Landing Pages
 - Create different sets of default views and pages based on department or user type.
 - Allow users to customize what information they see on their dashboard, submission view.

Service Deliverables

- Help City select an eplan review system (if desired). Integrate Camino with the selected eplan system.
- Integrate Camino with the City's GIS system.
- Configure additional permit types at City's discretion.
- Continued customer support for staff and public users.

Phase 4: 12 Months

Summary

The goal of Phase 4 is to add non-core functionality and also explore features that will help drive innovation beyond parity with TRAKIT. Depending on staff needs and time available, we will also explore AI-driven functionality in this phase.

EXHIBIT A

The list of deliverables below covers the *possible* functionality Camino may build under this phase. It is unlikely that this entire list will be necessary or be buildable within the 12 month period. The City and Camino can select which of the items to prioritize before starting Phase 4.

If the City decides to fund Phase 4, this phase will be used to complete the setup of any remaining permit types and also migrate data from TRAKIT. At the start of Phase 4 Camino will also negotiate an annual subscription rate for the City to continue using the Camino Permit Management system.

Possible Software Deliverables

- Code Enforcement
 - Residents can submit reports online, attach photos and comments.
 - Cases can be tracked and assigned.
 - Generate notices and letters.
 - Track and issue fines.
 - Surface open code enforcement issues when permit applications are submitted.
- Applicant Portal V2
 - Citizens can look up permit data by location/parcel.
 - Code enforcement portal for applicants.
 - Create multiple landing pages for different use cases.
- Role Based and Field-Level Permissioning
 - Specify which users/roles can view/edit which fields.
- Workflow V3
 - Create flowchart-style workflows with rule-based triggers.
- Mobile Interface V2
 - Expand functionality available to staff on mobile.
- Inspections V3
 - Automatic reassignment based on inspector availability.
 - Route planning.
- Payments V2
 - Generational invoicing.
 - Split a fee across multiple payment types.
 - Reverse refunds.
 - Charge fees against deposits.
- Multi-Language Support
 - Automatic translation of interface and content for applicants.
- Multi-parcel submissions
 - Allow for submissions to be tied to multiple parcels.
- Cashiering Integration
 - Integrate with City's cashiering system to track cash payments.
- Document Management
 - Document versioning – track different iterations of a document and edit history.
 - Organize documents into folders/categories.

EXHIBIT A

- Export documents for long-term archiving.
- Versioning of parcel data and fee schedules
 - Store history of versions of parcel map and fee schedules.
 - Track which version a submission is referencing.
- Parcel Management V2
 - Create, combine, and split parcels through Camino.
- Messaging V2
 - Expand to SMS, real-time chat.
 - Messaging options not tied to a Step.
- Document Generation V2
 - Generate documents from a Rich Text template.
 - Generate notices and mailing labels.
- Renewals and Recurring Tasks
 - Track expiration of submissions and automatically trigger a renewal workflow.
 - Create recurring tasks (like annual inspections) on a submission.
- Experimental additions (Optional)
 - AI-driven insights.
 - Automatic reminders and triggers based on activity.
 - Automatic review of applications and plans for completeness.
 - Drone based inspections.

Services Deliverables

- Data migration from TRAKIT.
- City-wide training.