

AGENDA BILL

**Beaverton City Council
Beaverton, Oregon**

SUBJECT: Contract Award - Development Review Process - Approval for Staff to Move Forward in Contracting for Electronic Permitting System Consultant and Project Manager Services With Berry Dunn

FOR AGENDA OF: 01-15-19 **BILL NO:** 19019

MAYOR'S APPROVAL: *Berry Dunn*

DEPARTMENT OF ORIGIN: CDD CT

DATE SUBMITTED: 01-02-19

CLEARANCES: City Attorney PL
Mayor's Office PL
Finance Adler
Purchasing SCB for TM
ISD TH

PROCEEDING: Consent Agenda
(Contract Review Board)

- EXHIBITS:**
1. Proposals Received
 2. Proposal Scoring Matrix
 3. Interview and Reference Check Scoring Matrix
 4. Project Information Sheet

BUDGET IMPACT

EXPENDITURE	AMOUNT	APPROPRIATION
REQUIRED \$74,963 (General Fund)	BUDGETED \$87,500*	REQUIRED \$-0-
\$24,987 (Building Fund)	\$25,750*	\$-0-

*The FY 2018-19 Budget includes the following appropriations for this project in Account Number: 001-70-0661-511 General Fund – Community Development Department – Department Admin & Support Program - Professional Services Account \$87,500 and Account Number 105-70-0664-511 Building Operating Fund – Community Development Department – Building Division Administration Program – Professional Services Account \$25,750.

RECOMMENDED ACTION:

City Council, acting as Contract Review Board, awards a contract in a form approved by the City Attorney to Berry Dunn, of Portland, Maine, for Electronic Permit System Consultation and Project Management Services in the amount of \$99,950.

HISTORICAL PERSPECTIVE:

From Spring 2015 through the present, City staff and managers responsible for the development review process, with assistance from Kennedy Consulting, LLC, Koné Consulting, LLC, and Communitas Planning, LLC have been identifying and implementing business process improvements. The primary purpose of this project is to meld the Planning, Site Development and Building processes into a seamless development review process that is:

- 1) supported by customer service that is timely, consistent, respectful, clear, accountable; and
- 2) conducted in partnership with the development community, with better tools and support to staff in performing their roles.

At the conclusion of Phase 1, a report was presented to City Council with specific recommendations regarding actions that the City should take in order to improve development review processes. Staff, consultants and stakeholders have made a great deal of progress on many actions, including actions identified for Phase 2 and Phase 3. One outstanding action is the implementation of an electronic

permitting system that assists staff in managing the many workflow processes within development review. The Request for Proposal for an Electronic Permitting System Consultant is a Phase 3 action.

INFORMATION FOR CONSIDERATION:

The Request for Proposal (RFP) was advertised in the *Daily Journal of Commerce* on September 21, 2018. A total of six (6) proposals were received and opened at 2:00 PM on October 22, 2018, (Exhibit 1). The proposals were reviewed and rated by a selection committee comprised of City staff. All proposals were evaluated on the following factors: knowledge, experience and qualifications (24 points possible), project approach and understanding (24 points possible), relevant experience and references (20 points possible), M/W/ESB Program (12 points possible), and contract price (20 points possible). The points awarded by selection committee members were averaged to arrive at an overall score for each proposer (Exhibit 2).

Based on scoring, staff invited the top three (3) proposers receiving the highest average score to interview. The interviews provided each of the three proposers with an opportunity for clarification and elaboration of each proposal and to respond to questions presented by staff. Interviews were held December 10 and December 14.

Out of the interviews, staff determined that reference checks were warranted for two (2) of the proposers. Staff prepared questions for the selected references and resources and asked five (5) northwest jurisdictions for their time. Each of these jurisdictions shared their perspectives on one or two of the companies in 30-45 minute phone calls on December 18 and 19.

After interviews and reference checks staff met with the Development Review Process Leadership Team to discuss differences in approaches presented by the two (2) proposers and the outcome of the reference check phone calls. Based upon the above criteria, interviews, reference checks and leadership discussion staff recommends that Council award a contract to Berry Dunn, the top proposer, based upon final scores (Exhibit 3).

Services to be provided to the City by Berry Dunn include:

- Analysis of the current CDD Permits system for the purpose of understanding current process, data migration needs, and advising the City on what will change with new technology;
- Assessment of City development review processes for strengths and barriers to meet current best practices related to electronic permitting systems;
- Recommendations for best practices in setting up a new electronic permitting system for use by multiple internal and external stakeholders.
- Identification of currently available electronic permitting systems including:
 - identifying trends in product development
 - cloud based solutions that meet City IT standards
 - a roadmap of product development for each currently available electronic permitting system that meets City IT standards
- Facilitation of discussions with City staff in order to inform development of an RFP for selection of a new electronic permitting system;
- Composition of a Request for Proposal (RFP) Solicitation for selection of a new electronic permitting system; and,
- Implementation support and technical assistance beyond the 'go live' date of selected electronic permitting system.

Project to kick-off at the conclusion of contract negotiation and execution with expected completion in the Fall of 2019.

City of Beaverton

PROPOSALS RECEIVED

Request for Proposal

Electronic Permitting System Consultant and Project Manager

Solicitation #3416-19B

Closed: October 22, 2018 @ 2:00 PM

Proposals Submitted:

1. **Avero Advisors, Maryville, TN**
2. **Berry Dunn McNeil & Parker, LLC, Portland, ME**
3. **Elyon Enterprise Strategies, Inc., Folsom, CA**
4. **SoftResources, LLC, Kirkland, WA**
5. **Treinen Associates, Inc., Olympia, WA**
6. **Virtual Information Executives, Portland, OR**

City of Beaverton
PROPOSALS RECEIVED
Request for Proposal
Electronic Permitting System Consultant and Project Manager
Solicitation #3416-19B
Closed: October 22, 2018 @ 2:00 PM

Evaluation Scoring Matrix, Proposal Scoring:

Electronic Permitting System Consultant and Implementation Project Manager, Solicitation #3416-19B
Evaluation Committee Score Sheet: PHASES ONE & TWO ONLY

Company Name	Evaluation Factor	Total Possible	LC	SD	TH	SK	LS	DW	TOTAL	AVERAGE	Overall Position
Company A Avero	1. Knowledge, Experience, & Qualifications	24	18	17	20	20	16	20	111	18.50	4
	2. Project Approach & Understanding	24	3	15	15	20	16	18	87	14.50	
	3. Relevant Experience & References	20	10	17	10	17	16	15	85	14.17	
	4. M/W/SDV/ESB Program	12	7	7	7	7	7	7	42	7.00	
	5. Contract Price	20	12	10	15	11	8	15	71	11.83	
	Total Maximum Points		100	50	66	67	75	63	75		
Company B Berry Dunn	1. Knowledge, Experience, & Qualifications	24	22	22	20	22	20	20	126	21.00	6
	2. Project Approach & Understanding	24	20	20	20	23	18	20	121	20.17	
	3. Relevant Experience & References	20	18	19	20	20	20	18	115	19.17	
	4. M/W/SDV/ESB Program	12	0	0	0	0	0	0	0	0.00	
	5. Contract Price	20	9	8	10	15	18	15	75	12.50	
	Total Maximum Points		100	69	69	70	80	76	73		
Company C Elyon	1. Knowledge, Experience, & Qualifications	24	12	18	15	20	15	6	86	14.33	6
	2. Project Approach & Understanding	24	8	18	15	20	10	6	77	12.83	
	3. Relevant Experience & References	20	6	18	15	16	12	3	70	11.67	
	4. M/W/SDV/ESB Program	12	3	3	3	3	3	3	18	3.00	
	5. Contract Price	20	3	8	5	11	8	5	40	6.67	
	Total Maximum Points		100	32	65	53	70	48	23		
Company D Soft Resources	1. Knowledge, Experience, & Qualifications	24	22	22	18	23	19	22	126	21.00	5
	2. Project Approach & Understanding	24	22	20	15	22	17	22	118	19.67	
	3. Relevant Experience & References	20	18	20	15	23	15	18	109	18.17	
	4. M/W/SDV/ESB Program	12	0	0	0	0	0	0	0	0.00	
	5. Contract Price	20	15	12	20	14	20	15	96	16.00	
	Total Maximum Points		100	77	74	68	82	71	77		
Company E Treinen	1. Knowledge, Experience, & Qualifications	24	18	17	18	18	15	12	98	16.33	5
	2. Project Approach & Understanding	24	18	17	15	19	12	15	96	16.00	
	3. Relevant Experience & References	20	14	18	20	18	12	10	92	15.33	
	4. M/W/SDV/ESB Program	12	0	0	0	0	0	0	0	0.00	
	5. Contract Price	20	18	15	15	17	16	20	101	16.83	
	Total Maximum Points		100	68	67	68	72	55	57		
Company F VIE	1. Knowledge, Experience, & Qualifications	24	18	18	15	23	20	20	114	19.00	5
	2. Project Approach & Understanding	24	20	20	15	21	20	18	114	19.00	
	3. Relevant Experience & References	20	16	18	10	19	22	18	103	17.17	
	4. M/W/SDV/ESB Program	12	4	4	4	4	4	4	24	4.00	
	5. Contract Price	20	6	12	15	6	18	10	67	11.17	
	Total Maximum Points		100	64	72	59	73	84	70		

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Evaluation Scoring Matrix, Interview and Reference Check Scoring:

Electronic Permitting System Consultant and Implementation Project Manager, Solicitation #3416-19B Evaluation Committee Score Sheet: PHASES ONE & TWO ONLY					
Company Name	Evaluation Factor	Total Possible	SCORE	Overall Position	Notes
Company A Avero	1. Knowledge, Experience, & Qualifications	24		n/a	no interview
	2. Project Approach & Understanding	24			
	3. Relevant Experience and References	20			
	4. MWMSDV/ESB Program	12			
	5. Contract Price	20			
	Total Maximum Points	100			
Company B Berry Dunn	1. Knowledge, Experience, & Qualifications	24	24	2	interview and reference checks
	2. Project Approach & Understanding	24	23		
	3. Relevant Experience and References	20	19		
	4. MWMSDV/ESB Program	12			
	5. Contract Price	20	12.5		
	Total Maximum Points	100			
Company C Elyon	1. Knowledge, Experience, & Qualifications	24		n/a	no interview
	2. Project Approach & Understanding	24			
	3. Relevant Experience and References	20			
	4. MWMSDV/ESB Program	12			
	5. Contract Price	20			
	Total Maximum Points	100			
Company D Soft Resources	1. Knowledge, Experience, & Qualifications	24	21	2	interview and reference checks
	2. Project Approach & Understanding	24	20		
	3. Relevant Experience and References	20	18		
	4. MWMSDV/ESB Program	12			
	5. Contract Price	20	16		
	Total Maximum Points	100			
Company E Treinen	1. Knowledge, Experience, & Qualifications	24		n/a	no interview
	2. Project Approach & Understanding	24			
	3. Relevant Experience and References	20			
	4. MWMSDV/ESB Program	12			
	5. Contract Price	20			
	Total Maximum Points	100			
Company F VIE	1. Knowledge, Experience, & Qualifications	24	20	3	interview
	2. Project Approach & Understanding	24	16		
	3. Relevant Experience and References	20	18		
	4. MWMSDV/ESB Program	12			
	5. Contract Price	20	11.17		
	Total Maximum Points	100	65.17		

DEVELOPMENT REVIEW PROCESS

To provide land use actions, construction permits, inspections, and final project sign-off to development projects that is supported by customer service that is timely, consistent, respectful, clear, and accountable, while satisfying local, county, regional, state, and federal rules and regulations to maintain excellence in the built environment for the community, neighborhoods, and residents.

Project goals/outcomes

Improve the city's process in order to:

- Provide improved and consistent customer service
- Communicate more effectively with customers and between staff
- Provide appropriate tools and implement technology to streamline the process
- Update to industry standards and increase competitive advantage of the city

Issues/opportunities

Issues include:

- Diverse and inconsistent approaches
- Lack of understanding of customer needs/issues
- Paper heavy processes for applicants, staff and partner agencies
- Lack of online opportunities to apply for and track applications, permits and plans review as well as inspections and project close-out
- City lagging in adoption/acknowledgement of current and changing practices

Opportunities include:

Customer Service

- Coordinate information on website and follow suit in guidebooks, brochures, forms, procedures, etc.
- Regular check-in points with customers via meetings or online surveys (more immediate feedback).
- 'Building in Beaverton' workshops for customers

Technology

- Electronic Document Review (Bluebeam Revu implementation)
- Electronic Permitting System (workflow management)

Continuous Improvement

- Develop a staff-to-staff/peer-to-peer culture that values quick identification of issues, problem-solving and actions

Recommendations

Staff recommends continued funding for this project, which is in the current FY2018-19 Administration Division budget and will be proposed for FY2019-20. This includes immediate investment in and long-term maintenance of an Electronic Application System (2019 consultancy work to develop a RFP and select a system vendor and 2019-2021 implementation of a new system).

Project information:

Program name:

Development Review Process

Lead Divisions:

- Planning
- Site Development
- Building
- Administration

Department Director Contact:

Cheryl Twete

Project Manager:

Leigh Crabtree

Estimated timeline:

Jan 2015 through Dec 2021

System maintenance beyond 2021

Community Vision Action Items this work supports:

- Create a Beaverton brand and market identity
- Expand outreach to under-represented populations
- Provide help to seniors who want to remain in their homes
- Redevelop blighted properties
- Help small businesses succeed as downtown grows
- Increase downtown housing options
- Assist and connect local business

Related efforts:

- Re-development and development throughout the city

Resources:

- City staff time, primarily: Community Development, Public Works, Finance, City Attorney's Office and the Mayor's Office
- Funding of staff resources, new technology and new equipment to support modern business functions