



CITY OF NORTH PORT PROCUREMENT FORM COMPETITIVE EXEMPTIONS



Please indicate: Visa Purchase Purchase Order

Single Purchase (For current FY)
 Blanket Purchase (Ongoing purchases for current FY)
 Change Order
 Amendment

DEPARTMENT/DIVISION: NDS/Building NAME OF REQUESTOR: Katrina Romano

If Applicable: COMMISSION MEETING DATE: 4/25/2023 AGENDA ITEM NUMBER: 23-0586

Section 2-403 - Exemptions of the City of North Port Procurement Code states that certain procurements shall not be subject to competitive requirements in the judgment of the Purchasing Agent.

A. Please describe all products and/or services to be procured under this exemption:
(If additional space is needed, please attach a separate memo)

See attached Memo A

VIP's agreement references the Carasoft GSA schedule (47QSWA18D008F)

B. Briefly explain why it is in the best interest of the City to procure under this exemption:
(If additional space is needed, please attach a separate memo)

This purchase utilizes the GSA Contract to get competitive pricing.

While the GSA Multiple Award Schedule (MAS) Contract vehicle was originally created for federal agencies, there are several programs in place that allow state and local government entities to utilize the contract. GSA Categories: Cooperative Purchasing*, Disaster Recovery*, Public Health Emergencies and 1122 Program are the programs which authorizes state and local buyers to utilize, and under what circumstances.*State and local government can purchase from GSA MAS Contractors that are eligible and have elected to participate in Cooperative Purchasing/Disaster Recovery.

Cooperative Purchasing allows state and local government to make purchases under specific GSA Special Item Numbers (SINs), mainly within the IT and Security related Categories. Cooperative Purchasing is unique in that it does not place restrictions on the type of purchase – state and local government may purchase products and services under any qualifying SINs at any time, for any reason. See attached Memo B

C. Vendor Information

Vendor Name: Visionary Integration Professionals (VIP) Vendor Number: 7891

Address: 80 Iron Point Circle, Suite 100, Folsom, CA 95630

Contact: Hope Robillard Phone: 916-985-9625 Email: hrobillard@trustvip.com



CITY OF NORTH PORT PROCUREMENT FORM COMPETITIVE EXEMPTIONS



D. Please select one of the following:

Piggyback (Departments may utilize another municipality, county, or other governmental agency contract). The requesting department must provide the following documentation: copy of the solicitation and addendum, tabsheet/price-sheet, vendor submittal, entity approval (either stated in the solicitation or letter from vendor) agenda approval and contract as back-up documentation. Purchasing may request additional information if needed.

Name of Entity: Visionary Integration Professionals Contract Number: 47QTCA20D00F1

Start Date: 09/16/2020 End Date: 09/15/2025

Is a fee required to utilize this contract? Yes No If yes, how much? _____
 Vendor-Paid City-Paid

State of Florida Contract: The requesting department must provide the following documentation: copy of the tab sheet/price sheet, agenda approval and contract ***Further price negotiations may be conducted with state-awarded vendor per F.S. 287.056(2) ***

Number: _____ Name/Category: _____

Start Date: _____ End Date: _____

Florida Sheriff's Association Bid: The requesting department must provide the following documentation: copy of the tab sheet/price sheet, agenda approval and contract

Number: _____ Name/Category: _____

Start Date: _____ End Date: _____

Joint Cooperative: The requesting department must provide the following documentation: copy of the solicitation and addendum, tab sheet/price sheet, vendor submittal, agenda approval and contract

Lead Entity: _____ Contract Number: _____

Start Date: _____ End Date: _____

Code Exemption* (Specify):

section 2-403 (a) 2

*For list of exemptions, see page 3



CITY OF NORTH PORT PROCUREMENT FORM COMPETITIVE EXEMPTIONS



Sec. 2-403. - Exemptions.

- (a) (2) Procurement contracts between the city and nonprofit organizations, other governments or other public entities.
- (3) Procurement of:
- a. Dues and memberships in trade and professional organizations.
 - b. Subscriptions for periodicals, books, maps or training videos.
 - c. Real property, real estate brokering, or appraising.
 - d. Abstract of titles for real property; title insurance.
 - e. Works of art for public display or artistic services.
 - f. Advertising.
 - g. Medical, dental and other medically related services performed by a health care professional.
 - h. Room or board for social service clients.
 - i. Room and board for employees on city business.
 - j. Funeral related services.
 - k. Water, sewer, electrical, cable television or other utility services.
 - l. Personnel, including but not limited to part-time or temporary services.
 - m. Academic program reviews or lectures by individuals.
 - n. Auditing services and financial services.
 - o. Legal services.
 - p. Social services.
 - q. Lobbying services.
 - r. Goods, materials and equipment whose cost has been incorporated as part of a competitively bid project.

Vendor Tracking:

Check if Vendor Documents Current

YTD Dept Exp. (Inclusive): \$ _____

To be completed by Purchasing:

YTD City Wide Exp. (Inclusive): \$ _____



CITY OF NORTH PORT PROCUREMENT FORM COMPETITIVE EXEMPTIONS



PURCHASE DETAILS

Please provide the amount of the purchase for this product or service: \$ 2,775,894.00

Account # <u>135-2700-524-68-00</u>	Project # <u>BD22OP</u>	Subtotal \$ <u>2,775,894.00</u>
Account # <u>135-2700-524-68-00</u>	Project # <u>BD22OP</u>	Subtotal \$ <u>277,590.00</u>
Account # _____	Project # _____	Subtotal \$ _____
Account # _____	Project # _____	Subtotal \$ _____

Line Item No.	Description	Unit of Measure	Quantity	Unit Price	Extended Price
1	use of VIP's services to implement Accela on-line permitting software	\$\$	2,775,894	1	2,775,894
2	10% contingency	\$\$	277,590	1	277,590
Shipping (FOB Destination)					
Total					3,053,484.00

Attach Additional Pages if Necessary

I approve the competitive exemption procurement(s) as requested herein:

Requesting Department Director: Alaina Ray Digitally signed by Alaina Ray
Date: 2023.03.23 16:56:24 -04'00' Date: _____

Budget Administrator: Lisa Herrmann Digitally signed by Lisa Herrmann
Date: 2023.03.29 10:50:35 -04'00' Date: _____

Purchasing: Alla V. Skipper Digitally signed by Alla V. Skipper
Date: 2023.03.28 17:02:30 -04'00' Date: _____

Finance Director (If applicable): Kimberly Williams Digitally signed by Kimberly Williams
Date: 2023.03.29 11:40:55 -04'00' Date: _____

Assistant City Manager (If applicable):  Date: 2023.03.29
17:05:07 -04'00' Date: _____

City Manager (If applicable): _____ Date: _____

Print Form

Clear All Fields

MEMO A: Please Describe all products and or services.

Software Licensing

Accela	Multi-Solution - Accela Annual Accela Building, Planning and Business Licensing Accela Inc - SS21000MU305I
	Accela Enhanced Reporting Database Annual Accela Inc - AS00DAC305I
	Multi-Solution - Accela Annual (1st Renewal Term) Accela Building, Planning and Business Licensing Accela Inc - SS21000MU305R1
	Accela Enhanced Reporting Database Annual (1st Renewal Term) Accela Inc - AS00DAC305R1
	Multi-Solution - Accela Annual (2nd Renewal Term) Accela Building, Planning and Business Licensing Accela Inc - SS21000MU305R2
	Accela Enhanced Reporting Database Annual (2 nd Renewal Term) Accela Inc - AS00DAC305R2
	Multi-Solution - Accela Annual (3rd Renewal Term) Accela Inc - SS21000MU305R3
	Accela Enhanced Reporting Database Annual (3rd Renewal Term) Accela Inc - AS00DAC305R3
	Multi-Solution - Accela Annual (4th Renewal Term) Accela Building, Planning and Business Licensing Accela Inc - SS21000MU305R4
	Accela Enhanced Reporting Database Annual (4th Renewal Term) Accela Inc - AS00DAC305R4
Gray Quarter	Gray Quarter Laserfiche Adapter Licensing (Years 1 through 5)
	DocuSign / AdobeSign (Years 1 through 5)

VIP Professional Services

Task	Description
Project Management Services	This task covers 18 months of project management support at 75% utilization, i.e., up to 2,268 hours for the 18 month implementation. The VIP Project Manager will split time between providing on-site and remote support for the life of the project. Project management support includes VIP deliverable submissions, specified project meetings, and monthly schedule and status reporting. In addition, VIP will provide up to ten (10) hours per month of project oversight and engagement management, up to 180 hours for the 18 month implementation.

Project Initiation	<p>This task is conducted after contract signing, and includes the Project Kickoff presentation, Jira Initial Project Configuration, Confluence Initial Project Repository Configuration, Initial Draft Project Schedule, and Initial Product Backlog Refinement.</p> <p>TeamVIP’s Training involvement encompasses:</p> <ul style="list-style-type: none"> • Core Team Training – up to two (2) days of training with fifteen (15) maximum attendees. 																																	
System Setup	<p>This task includes basic system setup support for the City to ensure Accela creates the required cloud environments required for this project. This includes the following Non-Production and Production environments that coincide specifically with what the City has purchased as part of their licensing agreement: Dev (Supp), Test, Staging, and Production. The City will be responsible for the system setup of any on-premises servers such as the server housing the payment provider interface adapter and ArcGIS server.</p>																																	
Product Backlog Refinement and Joint Application Development (JAD)	<p>VIP will lead Joint Application Development (JAD) sessions and support product backlog refinement sessions with the City to determine areas where configuration will be required vs. the Accela Civic Application. Analysis will be conducted on up to 130 Record Types vs. the Accela Civic Applications. Examples include Building Commercial New, Building Demolition, Planning Minor Subdivision, Code Enforcement Building Case, Business Tax Adult Day Care. Additionally, a complaint is a record type and a violation or enforcement action is considered a Record Type. Any unique combination of application, workflow, fee collection, inspection and issuance process is considered a Record Type.</p>																																	
System Configuration	<p>This task includes configuration of business processes for gaps discovered during backlog refinement against the Accela Civic Applications and JAD sessions. Summary totals of the estimated record types to be delivered are listed below.</p> <table border="1" data-bbox="451 1119 1300 1402"> <thead> <tr> <th rowspan="2">Record Type Summary</th> <th rowspan="2">Record Type Count Totals</th> <th colspan="3">Complexity</th> </tr> <tr> <th>High</th> <th>Medium</th> <th>Low</th> </tr> </thead> <tbody> <tr> <td>Building</td> <td>60</td> <td>22</td> <td>14</td> <td>24</td> </tr> <tr> <td>Planning and Zoning</td> <td>41</td> <td>13</td> <td>10</td> <td>18</td> </tr> <tr> <td>Code Enforcement</td> <td>9</td> <td>2</td> <td>0</td> <td>7</td> </tr> <tr> <td>Business Tax</td> <td>20</td> <td>2</td> <td>5</td> <td>13</td> </tr> <tr> <td>Totals:</td> <td>130</td> <td>39</td> <td>29</td> <td>62</td> </tr> </tbody> </table>	Record Type Summary	Record Type Count Totals	Complexity			High	Medium	Low	Building	60	22	14	24	Planning and Zoning	41	13	10	18	Code Enforcement	9	2	0	7	Business Tax	20	2	5	13	Totals:	130	39	29	62
Record Type Summary	Record Type Count Totals			Complexity																														
		High	Medium	Low																														
Building	60	22	14	24																														
Planning and Zoning	41	13	10	18																														
Code Enforcement	9	2	0	7																														
Business Tax	20	2	5	13																														
Totals:	130	39	29	62																														
Data Conversion	<p>This task includes the conversion of one (1) databases into the Accela Civic Platform.</p> <p>The full list of Databases in scope are:</p> <ul style="list-style-type: none"> • Central Square’s Naviline database 																																	
Interfaces	<p>The full list of interfaces in scope are:</p> <ul style="list-style-type: none"> • Forte Payment Provider • License Verification Site - Florida Department of Business and Professional Regulation (DBPR) • Laserfiche EDMS • Naviline Financial System • DocuSign • Quadient Certified Mail Service • Legistar 																																	

	<ul style="list-style-type: none"> • Lucity • Lien Search (Orange Lien) • Permit Data • Wellen Park Housing Permits • Selectron IVR (Not within the scope of this SOW. Direct services from Selectron) 																																	
Business Automation	<p>Up to 1,307 hours for business automation rules (scripting).</p> <p>The different types of Business Automation Rules for these hours are defined as follows:</p> <ul style="list-style-type: none"> • Validation Script - Script that validates data and prevents submission of a form when the business rule fails • Fee Automation Script – When fees need to be assessed and updated via scripting. Common for customers using legacy products where fees are already auto-assessing based on user defined fields and other criteria • Record Creation Script – Records are created via scripting, pre-populated and linked to a record hierarchy • Automation Scripts – General automation, such as creating an inspection, updating user defined fields, updating workflow, etc. • Renewal Scripts – Scripts that automates the renewal processing for record types that are renewable • Amendment Scripts - Scripts that update master records based on an amendment 																																	
Electronic Document Review (EDR) Configuration	Includes configuration and deployment of ePermitHub’s Digital Plan Room (DPR) to support Electronic Document Review for up to 59 record types that would require EDR. EDR will enable the submission, review and markup of documents to work effectively given the City’s configuration.																																	
Reporting	<p>Up to 1,782 hours for report development. Total report development hours are based on the current report complexity breakdown summary below.</p> <table border="1" data-bbox="500 1270 1318 1558"> <thead> <tr> <th rowspan="2">Report Summary</th> <th rowspan="2">Report County Totals</th> <th colspan="3">Complexity</th> </tr> <tr> <th>High</th> <th>Medium</th> <th>Low</th> </tr> </thead> <tbody> <tr> <td>Building</td> <td>24</td> <td>11</td> <td>6</td> <td>7</td> </tr> <tr> <td>Planning and Zoning</td> <td>25</td> <td>17</td> <td>7</td> <td>1</td> </tr> <tr> <td>Code Enforcement</td> <td>34</td> <td>7</td> <td>15</td> <td>12</td> </tr> <tr> <td>Business Tax</td> <td>2</td> <td>0</td> <td>1</td> <td>1</td> </tr> <tr> <td>Totals:</td> <td>85</td> <td>35</td> <td>29</td> <td>21</td> </tr> </tbody> </table>	Report Summary	Report County Totals	Complexity			High	Medium	Low	Building	24	11	6	7	Planning and Zoning	25	17	7	1	Code Enforcement	34	7	15	12	Business Tax	2	0	1	1	Totals:	85	35	29	21
Report Summary	Report County Totals			Complexity																														
		High	Medium	Low																														
Building	24	11	6	7																														
Planning and Zoning	25	17	7	1																														
Code Enforcement	34	7	15	12																														
Business Tax	2	0	1	1																														
Totals:	85	35	29	21																														
GIS	Setup and configuration of Accela GIS for City to City’s ESRI ArcGIS.																																	
Accela Mobile	Accela Mobile configuration.																																	
Accela Citizen Access	Standard ACA Portal configuration.																																	
Training	<p>TeamVIP’s Training involvement encompasses:</p> <ul style="list-style-type: none"> • Core Team Training – up to two (2) days of training with fifteen (15) maximum attendees. Performed during the Plan stage. 																																	

	<ul style="list-style-type: none"> • Admin Usage – up to three and a half (3.5) days of training with ten (10) maximum attendees. • Accela Citizen Access Admin – up to one (1) day of training with ten (10) maximum attendees. • Train the Trainer – up to four (5) days of training, with seven (10) maximum attendees.
User Acceptance Testing (UAT)	Includes up to 6 weeks of User Acceptance Testing support. Client User Acceptance Testing is strictly limited to 4 weeks of executing test cases. No new test cases will be supported beyond what is tested within this 4 week window. The final 2 weeks of UAT will be used to address remaining open defects and only re-testing of existing test cases are supported.
Go Live Support	Go-live weekend and Post Go-live support for 4 weeks, with 2 dedicated resources the first two weeks and 1 dedicated resource the final 2 weeks.

MEMO B: Briefly Explain why it's in the best interest of the city to procure through this exemption:

VIP provides the city of North Port with a highly qualified team of experts that have a proven track record of successful delivery of the Accela Civic solution. VIP has implemented the Accela solution in counties and cities of similar size to North Port. VIP implements an award-winning agile methodology that brings in projects within budget and on time. The team has been working hand-in-hand with the city of North Port and has a deep understanding of the scope, business needs, requirements and comprehends the needs of the city. VIP and Accela have local key personnel that will be assigned to this project. Accela is the industry standard for licensing and permitting for the state of Florida, as many neighboring counties and cities utilize the platform. The city of North Port has evaluated several local contractors to better understand their needs. Several contractors expressed their enthusiasm for Accela, as they are familiar from utilizing it at other counties and cities. Accela has a strong user's group that the city of North Port can collaborate with as they onboard a new system. VIP/Accela has replaced Naviline/TrackIT in several municipalities through the state with great efficiency.

The North Port, Building Dept. has had several conversations and evaluations of the proposed solution, implementation delivery, and continued services. We are confident that the functionality and services proposed by VIP and Accela will meet our rigorous standards.

Summary points:

- 1) The North Port, Building Dept. has previously been through two failed service implementations; the most recent implementations and solution failure w/ Central Square was a key factor in this replacement initiative.
- 2) The city of North Port needs a new modernized permitting system in order to keep up with the incredible growth (ranked #2 fastest growing city in the country) by electing to purchase through the GSA state contract schedule 70 where we are able to avoid the long rigorous RFP process and start implementing the new solution immediately.
- 3) Accela is the software utilized by virtually all the neighboring cities and counties surrounding North Port. This includes Charlotte County, Sarasota County, Tampa, Clearwater, and soon the City of Bradenton. This will greatly benefit our citizens given the contractors that work in Southwest Florida will all be able to use a single familiar platform to perform all permitting services with the cities and counties in this area. This will improve familiarization, standardization, consistency, ease of use, and overall happiness for contractors that work with North Port utilizing the same permitting system that the other surrounding areas use.
- 4) Accela also has a very strong user community of Florida cities and counties which North Port would be a part of to attend and gain access to share information easily and transparently with other cities and counties in the area to support their citizens and back-office personnel on the Accela system.

- 5) VIP is considered the best Accela implementation provider for Accela in the country with the strongest and most experienced resources. The proposed resources on this project have been part of numerous Accela implementations including the #1 and #2 largest Accela implementations in the country. This includes the recent successful implementation of Fairfax County, VA with 9 departments, 300+ record types (permits), 20 interfaces, and numerous database sources. Therefore, the North Port implementation is a very standard implementation for VIP in their wheelhouse that they have been 100% successful deploying.
- 6) VIP has already performed a complete high-level analysis of not only North Port's current Naviline system and its permits and processes, but VIP has also completed the to-be analysis with our staff to already identify all record types and reports that will be developed in the new Accela system. VIP did so with all departments one by one. This includes VIP already identifying together with our staff the best practices on how to greatly improve our processes going forward from VIP's experience implementing jurisdictions across the country. VIP is the only implementor in existence that has this knowledge and has already analyzed our as-is and to-be for our system.
- 7) VIP's Naviline data conversion experience is second to none. The data conversion resource for this project has arguably the best experience in the country for performing Naviline data conversions in the State of Florida for numerous cities/counties working for Sungard for many years. This resource who will be working on this project supported a major data conversion in the City of Fort Lauderdale converting a Naviline based system to the Accela Civic Platform proposed for this project. In addition, he did so together with the Engagement Manager and the Functional Lead that will also be working on our North Port project from VIP. Therefore, several of the primary resources for this project have worked together on the same team implementing a successful deployment from a Naviline based system to Accela for the City of Fort Lauderdale, a project similar and more sizable than North Port.
- 8) The primary resources for this project live within very close proximity to our North Port City offices which is a significant advantage against all other implementors allowing for the ease and increased frequency for onsite presence during the project.
 - a. The Engagement Manager (with 29 years of experience) who will be managing this project is a North Port resident and lives less than 10 minutes from the North Port City offices. He has been very working closely with our staff for over a year to provide us with this new land management system.
 - b. The Project Manager for this project lives roughly 25 minutes from the North Port City offices.
 - c. The data conversion resource described above lives in the State of Florida within driving distance to the North Port City offices.
 - d. The VIP Sales manager for this project lives within one hour and a half from the North Port City offices.
 - e. The Accela account executive who serves the entire state of Florida lives only 15 minutes from the North Port City offices.
- 9) The Engagement Manager described above that will be managing this project has real life experience and knowledge of the North Port permitting process obtaining six (6)

land management permits in the last several years for his own residence (and knows many of the North Port staff including the City inspectors).

- 10) The North Port, Building Dept. has reached out to several neighboring municipalities, in addition to municipalities of similar size in an effort to understand their service delivery and solutions. In response, we have received great references on **Accela** as a best-in-class solution.
- 11) The North Port, Building Dept. has had several conversation and evaluations of the proposed solution, implementation delivery, and continued services. We are confident that the functionality and services proposed by VIP and **Accela** will meet our rigorous standards.
- 12) The North Port, Building Dept. has done its due diligence in working with the City of North Port, Purchasing Division to ensure we are in keeping with procurement requirements for sole source purchasing
- 13) The City of North Port has made several sole source purchases in the past thru GSA contract vehicles. We are confident this contract vehicle will ensure the past possible terms and conditions as guaranteed by the *US General Services Administration*.