MEMORANDUM

TO: Trustee Bill Johnston, Chairperson
Economic & Community Development Committee (ECDC) Members

FROM: William J. Heniff, AICP, Director of Community Development

MEETING DATE: February 12, 2018

SUBJECT: **Building Permit Software Program**

As part of past ECDC discussions and the Village Board's annual budget process, the Community Development Department staff has undertaken a review of software programs that can meet the desired goals expressed by the public and the development community. The purpose of this effort is to identify, purchase and implement a new software permit and code enforcement system within the next calendar year.

The Village's software review was based upon several internal and external factors:

1. The Village was informed that the existing software program (New World Systems) was being discontinued and new update and enhancements would no longer be made to the program. Patches to the existing program would still be made and they would continue to support the existing software at the current time.

2. While the program is quite proficient in meeting Finance Department needs, the software program did not have full processing enhancements. Larger goals expressed through Committees (ECDC, BOBA) and the public is to advance technology, but constrained by existing software, manual processes and lack of research and development time as the status quo is no longer cutting-edge.

3. The current operating program (NWS) does not provide for on-line permit submittal and tracking and has resulted in the following system deficiencies:
   - Results in manual tracking of electronic permits
   - Limited availability and scope
   - Does not meet increasing public demand for 24/7 engagement
   - Scanning, change orders and inspection elements

A departmental goal is to provide on-line permit submittal, electronic plan review an on-line permit issuance. As such staff undertook a review of several software programs to find a program that can best meet our needs in a cost-effective manner.

Within 2018 budget, a Technology Reserve request for $307,480 was initially sought to select vendor to provide and implement a software program which will meet public and contractor submittal and approval needs. Through this analysis, CitizenServe has been identified as the preferred software program as set forth within the attached narrative and comparison table.

ACTIONS TO DATE
Staff brought this matter to BOBA at their Janaury 31, 2018 meeting and they unanimously recommended that the Village proceed with the purchase of the CitizenServe software. Their recommendation was based upon the input of the members about the desirability of the package from a contractor and professional user perspective.

ACTION REQUESTED
Staff is now bringing this matter to ECDC for a recommendation to proceed with the purchase of the CitizenServe software at a cost of $60,000 in 2018 and an annual maintenance/ upgrade cost of $30,000 annually. At the ECDC meeting staff will be sharing the software with the members and will seek input of the members about the desirability of the package from a user and economic development perspective.

COMMUNITY DEVELOPMENT SOFTWARE REVIEW

OVERVIEW

Project Background and Description

The Community Development Department currently uses New World Software. New World was chosen partly to have all departments on the same program to aid in information sharing, etc.. While this made sense when the decision was made, software and the technology surrounding its use has changes very quickly. The Village has also realized there is no one company that meets the needs of all departments

A complete review including product live demonstrations, remote demonstrations, site visits, and attendance at a permit technology trade show took place. Live and remote software demonstrations were attended by various employees from the Community Development Department as well as the Clerk's Office, the Finance Department, IT, and Fire Prevention.

Project Scope

The Community Development Department set out to find Community Development software that was developed with the needs of a modern Community Development Department. This would be a direct replacement of he current New World module currently used to include, permits, Code Enforcement, Planning, and Licensing

Deliverables

- All permits to be available online for all customers
- All licenses and registrations to be available to be applied for and renewed online
- All permits to be able to be completely submitted, reviewed, and approved digitally (No paper)
- Completely new customer online portal that requires no training for most customers
- Report a Concern to be directly connected to the new software to avoid transferring of data from one program to another
- Financials from new CD software to tie directly (automated) with existing New World software to remain in use by the Finance Department

Affected Parties

This software replacement will affect the complete Community Development Department, the Fire Prevention Bureau (permit review process), the Clerks' Office as it relates to Licensing, the Finance Department to assist with the financial tie in, and Public Works as it relates to plan review.

Affected Business Processes or Systems

While initially the processes will be similar to current practice, much will change over the next couple years to come as paperless permits is utilized by the public. Many processes currently used by staff are based around paper forms, data entry, reports to track permits/projects, and physical meetings (both internally and with the public). Also, two of the four software vendors are cloud based, so no physical servers to maintain on site for the Village of Lombard. Lastly, all documents including the plan sets, GIS, etc. will be housed in the CD software itself rather than through Optiview as is currently done.

Specific Exclusions from Scope

The current scope specifically did not include any software review for software used by other departments (other than Public Works, Fire, and Clerk's Office as they relate to permits and licenses, and Finance as it relates to tying the financials together). Compatibility with current software programs has been vetted as well as ways to share information department to department.

Implementation Plan

Following a staff and Village Manager review and recommendation, the chosen product and project scope would be brought to the Board of Building Appeals for a presentation to seek comments and a recommendation, to the Economic and Community Development Committee for a presentation to seek comments and a recommendation, possibly the Finance Committee for a presentation to seek comments and a recommendation, and finally the Village Board of Trustees to seek an approval prior to early Spring 2018.

Following the review and approval process, the contract would be signed, current data migrated over the Spring and Summer of 2018, staff training in Fall of 2018, public testing in late fall of 2018, start accepting digital permits in early Winter of 2019, full public announcement and unveiling in early Spring of 2019 with all permits available online digitally.

If the choice is made to choose Citizenserve, Lombard has a roadmap as Mt. Prospect Illinois switched from New World to Citizenserve earlier in 2017 and has already converted data, trained, and is staged for a full rollout of Citizenserve. Mt. Prospect is a similar Village that has worked closely with Lombard to share information throughout the process of reviewing software companies.

Community Development
Software Comparison

CD Software Product	First Year	Annual Cost Every Year After	(First Year + 4 Annuals After) Total Cost After 5 Years	Net Difference
TYLER/NEW WORLD/CURRENT VENDOR DO NOTHING				
• Not Cloud Based	$ 27,500	$ 27,500	$ 137,500	$ -
• Less than 10% permits available online. No ability to submit digital plans.				
• Report a concern not tied to software				
• Unreliable Product				
CITIZENSERVE				
• Cloud Based	$ 60,000	$ 30,000	$ 180,000	$ 42,500
• 100% of permits available online				
• Report a concern tied to software directly		*No Upgrade Costs		
BS&A				
• Not Cloud Based	$ 188,935	$ 17,410	$ 206,345	$ 68,845
• 100% of permits available online				
SMARTGOV				
• Cloud Based	$ 124,371	$ 35,946	$ 268,155	$ 130,655
• 100% of permits available online				
• Includes advanced integrated plan review that would eliminate need for Blue Beam				
• Proven track record of 100% paperless permits at many municipalities				
TYLER/ENERGOV				
• Not Cloud Based	$ 188,840			
• 100% of permits available online				
• Easy conversion and tie to existing New World (Finance Keeping)	$ 24,000 Travel			
since EngerGov and New World owned by same parent company (Tyler)	$ 212,840	$ 27,860	$ 324,280	$ 186,780
• Also proven track record of paperless permits				