



## COMMUNITY DEVELOPMENT SERVICES

### MEMORANDUM

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**Date:** September 18, 2018

**To:** Members, Honorable Board of Supervisors

**From:** TRAKiT Executive Sponsors

**Subject:** TRAKiT Implementation Schedule

The TRAKiT system went live on May 14<sup>th</sup>. The following is the progress in achieving the total functionality of the TRAKiT system after the first implementation:

#### **Current Functionality of the System**

The system is currently up and working and allowing for the processing of permits and inspections. The system allows for users to obtain land use information online via searches or via GIS maps (e.g. historical information and current information). Staff has obtained the information on how to create reports out of TRAKiT and is working to provide this information to end users. In addition, staff has tested the ability of the system to take in updated information from the County. There will be an additional updating test in the next few weeks.

There have been some issues with the permits that were applied for in the old LMIS system and are now going through the permitting process in TRAKiT. Staff is mitigating these issues. We are not seeing the same issues with new permits that are starting the process in TRAKiT.

#### **Current System Issues Working to Correct**

There are system issues that TRAKiT has been working to correct since implementation. TRAKiT assured staff that the system fixes could be made before an upgrade to the system was required (a system upgrade is part of the contract and does not cost additional funds). However, a week ago TRAKiT staff acknowledged that the fixes could only be accomplished with the new upgrade. Upon getting this information, the Executive Sponsors voted to start the process of the upgrade, so full functionality of the system could be achieved. This is a disappointing outcome because if this information was provided earlier the Executive Sponsors would have voted to start the upgrade months ago. A call has been scheduled with TRAKiT on 9/13 to schedule the upgrade.

Currently, there are a number of fixes that need to be made in the upgrade so the system can provide full functionality for staff. The most significant fix that needs to be made is to the GIS spatial rules that help Planning and Building staff efficiently apply fees and reviews to different projects and permits in different areas of the County. This feature was important in the selection of TRAKiT as to decrease human error in picking fees and reviews. TRAKiT has provided the County a temporary fix. However, the fix does not provide the same functionality that the upgrade will. El Dorado County has not made payment to TRAKiT for final implementation due to the fixes that need to be made. The payment that is being held is in the amount of \$232,410. Once the upgrade

has been completed and it is verified that it works payment will be made.

In addition, the County has successfully taken credit/debit card payments online from a limited amount of permittees on TRAKiT. The implementation of the credit/debit card system has been a long process due to many vendor delays. The credit/debit card vendor has had software issues with card machines that it has provided. Likewise, the credit/debit card vendor has found an error in the method in which it collects its convenience fee from the transaction. These issues are not due to County systems. The credit/debit card vendor has reported that these issues should be fixed by 9/17/2018. Once these issues are fixed, the Executive Sponsors will work to advertise the ability of the general public to pay for fees with credit/debit cards.

### **Budget**

Currently the project is within its budget for the implementation and for yearly maintenance. To date for pre implementation work and maintenance work completed payments have been made and are within budget. A payment for \$232,410 is being held for the completion of implementation work. The contract for independent consultant services in the planning and implementation process has been completed and is being closed out. The balance left is approximately \$100,000. The savings was mostly due to the consultant leaving the project due to moving to another state. Staff picked up the extra work during the planning and implementation process.

### **System Opportunities Moving Forward**

The Planning and Building Department is working on taking some permits completely online (e.g. permit application to payment to completed permit). The Planning and Building Department is looking to start with residential re-roof permit type and as it becomes more comfortable with the process it will add more permit types. The following are some of the permit types that will be added to the online process:

- **Residential Electrical** (Service Panel, Subpanel, Alteration/Repair, Replace Service Panel, Replace Subpanel, Electric Vehicle Charging Station, Generator, Energy Storage System, Well, Temporary Service)
- **Residential Mechanical** (Electrical HVAC, Gas HVAC, Duct, Furnace, Replace A/C coil and condenser, Wood fireplace/Stove, Gas Fireplace/Stove, Whole House Fan, Alteration/Repair)
- **Residential Plumbing** (LP tank set, Replace Piping, Alteration/Repair, Water Heater Electric, Water Heater Gas, Solar Thermal, Water Tank)

Over the next few weeks, staff will be using different communication tools to make the public aware of the new functionality of the system (e.g. credit/debit card usage and online permitting).

### **System Governance**

Staff is working to create documents that memorialize the roles and responsibilities and level of service desired once the implementation stage of TRAKiT is completed. These documents will assure that departments using the system will get the level of service desired from the department(s) that will be assisting TRAKiT in the system maintenance.

## **Project Sponsors**

The Project Sponsors include Rich Briner, County Surveyor; David Russell, Information Technology Director; Rafael Martinez, Transportation Director; Greg Stanton, Environmental Management Director; and Roger Trout, Planning and Building Director.

## **TRAKiT Background**

The County's Land Management Information System (LMIS) is the foundation for many revenue-generating and/or recovering of County services and systems. The current LMIS is a collection of databases and application platforms that link together key processes such as planning, permitting, inspections, addressing, mapping, and parcel assessments. This system does not include the capability to accept, review, and process plans, permits, or fees electronically.

The current LMIS was constructed over time, largely in-house. It has developed organically to support legacy processes (out of date processes) and business rules, some of which originated before modern technology and automation. As a result, the current LMIS system is a collection of independently-developed modules and functions that are made to communicate in sometimes non-standard ways. As a whole, LMIS does not conform to any modern IT architectural standard and cannot be centrally administered or maintained. While the system has served the County well, it is time to replace LMIS with a modern system that expands functionality and improves the customer experience.

In recognition of the inherent limitations of the LMIS system, the Board awarded a Request for Proposals for an electronic permit system to SunGard and authorized CDS, formerly the Community Development Agency, to negotiate the associated contract for TRAKiT implementation and maintenance services on February 23, 2016 (Item 41).

Purchase and implementation of an electronic permit system is a key part of CDS's effort to improve development processing. In addition to service improvements realized by the CDS Ombudsman Program and the new queueing system in the Building C Permit Center, the TRAKiT system will allow for the processing and issuance of online building permits, the utilization of electronic field devices by inspectors, and electronic submittal, plan checking, and processing of building and civil improvement plans.

Implementation of the new TRAKiT permit system will result in several improvements:

### **Elimination of mainframe usage will**

- Result in a reduction in associated hardware, software, system, and labor costs
- Allow redirection of Information Technology resources from legacy programming languages to new state-of-the-art technologies
- Enable departments and agencies to improve services by leveraging new technology
- Comply with Board direction to migrate from existing mainframe technology

### **Operating efficiencies will be achieved by**

- Redesigned operations, tighter integration of business processes and data, and new capabilities such as workflows and mobile devices
- The availability of project status/reports in dashboard and snapshot views to the Board, management, staff, and customers
- Specialized resources are no longer needed to develop customized solutions (i.e., shadow

systems, excel spreadsheets, etc.) for emergency and one-time use projects and reports

*Customer service will be improved by*

- The implementation of a 24x7 customer-facing portal that allows: online permit application and fee payment; online submission of plans and supporting documents; automated e-notification of permit and project status; and online management of inspection schedules
- Cost savings from elimination of printing and paper costs incurred with the submission of numerous paper plan copies and documents
- Cost and time savings from a reduction in trips to submit/resubmit applications and plans

