



**CITY OF SALINAS  
COUNCIL STAFF REPORT**

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**DATE:** NOVEMBER 14, 2023

**DEPARTMENT:** COMMUNITY DEVELOPMENT

**FROM:** LISA BRINTON, DIRECTOR

**THROUGH:** ANGELINE ANZINI, CHIEF BUILDING OFFICIAL

**BY:** YAZMIN OCHOA-FLORES, ADMINISTRATIVE ANALYST

**TITLE:** AUTHORIZATION OF YEAR THREE PROJECTDOX EPLAN RENEWAL AND CORRESPONDING SERVICE AGREEMENTS WITH AVOLVE SOFTWARE, INC.

RECOMMENDED MOTION:

A motion to approve a Resolution authorizing the City Manager or designee to negotiate and execute a Year Three ProjectDox ePlan Renewal and corresponding Service Agreements with Avolve Software, Inc. for an amount not to exceed \$138,000 through December 2024.

EXECUTIVE SUMMARY:

On June 22, 2021, the City of Salinas entered into a Services Agreement with Avolve Software Inc., the developer of OAS and ProjectDox software (Resolution No. 22140 (N.C.S.)). OAS and ProjectDox software are utilized to provide residents, design professionals, and developers the ability to submit their permit applications for review and approval electronically. Electronic plan review provides greater efficiency by streamlining processes and creating a digital one-stop review of building permit applications.

In January 2023, Council approved Resolution No. 22569 (N.C.S.) authorizing the Services Agreement renewal (through December 2023) with Avolve for Year Two in the amount of \$101,160. The amount of the Renewal for Year Three remains the same, \$101,160, and covers services through December 2024. Year Three Renewal does not include assurance services, annual subscriptions, or SolarAPP+ implementation, estimated to be approximately \$36,840. The funding source for the Renewal and Services Agreements is the Capital Improvement Program 9093, Permit Systems and Technology Upgrade, which is funded by a 5% technology fee collected as part of building permit fees.

BACKGROUND:

Under State Assembly Bill 2234, a public agency must require permits to be applied for, completed, and stored through a process on its internet website. Jurisdictions with a 2020 census population greater than 75,000 must comply no later than January 1, 2024. To fulfill this mandate,

on June 22, 2021, the City entered into a Services Agreement with Avolve Software Inc., the developer of OAS and ProjectDox software. Avolve's OAS system enables design professionals and architects to upload electronic plans for review. Once uploaded, City staff track, review and process plan checks electronically via ProjectDox, which helps manage the permit application and review process. In addition to reviewing plans, ProjectDox serves as a digital repository for approved plans to be maintained and used by city staff in the future.

Project Dox allows applicants to submit their application when it is convenient for them. The software performs automated tasks and gives the applicant immediate feedback about missing information on forms, address validation, contractor license validation, the ability to pay fees and more. This greatly reduces the need to deliver applications and materials at the counter, simplifies file sharing, and cuts down staff time for data entry. The software complements the Permit Center's one-stop-shop concept to create a virtual multi-departmental permitting center.

Avolve software is proven integrated with our current permitting software, TRAKiT. The software guides the applicant through each step of their participation in the review process with videos, in addition to written instruction. ProjectDox allows for better tracking across review cycles by providing reviewer mark-up tools, prioritizing task assignments, automating version tracking, and processing data analytics. In addition, digital signatures can be maintained in the system during virtual meetings where plans are redlined for approval.

The Year Three ProjectDox ePlan Renewal does not account for any possible assurance services, program modification to implement state mandated SolarAPP+ and annual subscription Services. Assurance Services hours can be used as needed, for ProjectDox configuration, training and any additional required changes. These hours are only invoiced upon use. Attachment 5 includes the Assurance Services Pricing Agreement.

Additionally, under State Senate Bill 379, local permitting jurisdictions, with the population greater than 50,000, are required to adopt SolarAPP+ or a similar program. SolarAPP+ is provided at no cost by the State of California but implementing it to our current ProjectDox system requires Avolve to complete the scope of work described in Attachment 4.

Annual Subscription Services are used for both the Avolve Learning Center Solution and access to modify reporting in Projectdox and OAS. The Avolve Learning Center Solution provides on-demand web-based training for staff. Staff can watch tutorials on specific items, learn at their own pace and level of expertise in the system. Access to modify reports will allow better tracking of internal procedures, performance measures for the annual budget and more data to utilize in the annual Permit Center update.

CEQA CONSIDERATION:

**Not a Project.** The City of Salinas has determined that the proposed action is not a project as defined by the California Environmental Quality Act (CEQA) (CEQA Guidelines Section 15378).

STRATEGIC PLAN INITIATIVE:

This Renewal and corresponding Services Agreements furthers the City Council's 2023-2025 strategic goals of Economic Development and Housing/Affordable Housing. The Avolve electronic plan review software will continue to offer a streamlined and efficient process for both residential and commercial permits which supports businesses to obtain important construction permits in a timely manner.

DEPARTMENTAL COORDINATION:

The Community Development, Public Works, and Fire Departments utilize ProjectDox for building permit plan review. Information Technology Division supports Project Dox and Trakit database integration.

FISCAL AND SUSTAINABILITY IMPACT:

There is no fiscal impact to the General Fund. Funding is available and appropriated in Capital Improvement Program 5800.9093. The Permit Systems & Technology Upgrade is funded by the 5% technology fee collected as part of building permit fees.

ATTACHMENTS:

1. Resolution Authorizing Year Three ePlan Renewal and Services Agreements
2. 2021 Executed Avolve Service Agreement
3. Year Three Consultant Quote and Statement of Work (August 14, 2023)
4. SolarAPP+ Implementation Professional Services Agreement
5. Assurance Services Pricing Agreement