

**SULTAN CITY COUNCIL
AGENDA ITEM COVER SHEET**

ITEM NO: A-2

DATE: August 13, 2009

SUBJECT: Contract Extension
Authorizing additions to the contract with the Latimore Co. for continuation of the permit tracking and streamlining project.

CONTACT PERSON: Robert Martin, Community Development Director

ISSUE: Authorization of additional funding for extension of existing contract with the Latimore Co. to expand and enhance the recently installed basic permit tracking system.

SUMMARY: The Latimore project has provided the city with an operational permit tracking system. The system has additional capabilities that will be highly beneficial to operations, and staff needs additional implementation support from Mr. Latimore to make the installed system as effective as possible. The work proposed in this contract extension involves additional permit processes (mostly land use procedures), staff support and training, and integration with the city's Springbrook Financial Management system.

DISCUSSION:

The Council authorized \$18,000 in the 2009 budget for the development and installation of a permit tracking system by the Latimore Company. The "Latimore Dashboard" has been developed and installed and is operational. It is being used by staff to coordinate and expedite the issuance of permits. The "dashboard" has been instrumental in reducing the backlog of un-reviewed business license applications from approximately 40 to 0.

However, the business license process is the least complex of the procedures that we need to handle with the system. Having proven the effectiveness of the system, we need to refine and expand some of its capabilities in the areas of land use processes and building permit coordination. This component of the expanded scope of work can be seen in detail on **Attachment A**. This component is proposed at \$8,000.

Beyond the above additional work items, staff and council initially discussed integration between the permit tracking system and the Springbrook financial management system used for most other city tracking and accounting functions. Mr. Latimore and City Clerk Laura Koenig have determined that building permit and utility hookup fees can be entered in the permit intake process and transferred automatically to the Springbrook system. The savings in time, double entry of data, potential for error, and other

efficiencies is very significant. Implementation of this capability is described on **Attachment A**, and is proposed at \$20,000.

FUNDING SOURCE:

At this time, the budget has received excess building and plan check permit fees in the amount of \$18,800.

The balance of the proposed amount (\$9,200) is available in the Building Department where professional services for the County's Fire Marshall were allocated. The County's services have been very economical and there will be at least \$10,000 additional in that line item at the end of the year to cover this proposed project.

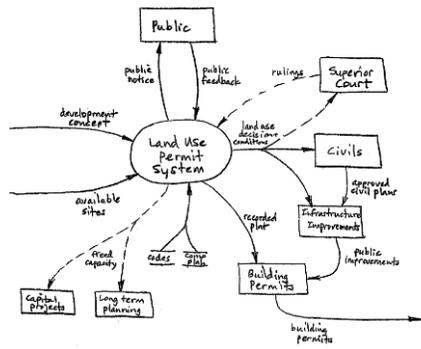
Existing funds are available to cover the full amount of \$28,000 proposed for this additional scope of work.

ALTERNATIVES:

1. Authorize a lower level of expenditure and direct staff to return with a reduced scope of work.
2. Do not expand the scope of work and do not further upgrade the permit tracking and financial interaction system.

RECOMMENDATION:

Staff recommends that Council authorize the Mayor to sign a contract amendment with the Latimore Company to accomplish the additional tasks described in the scope of work (**Attachment A**).



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August 5, 2009

Sultan Permit Process Improvement

Thank you for this opportunity to assist the citizens of Sultan by continuing our work together to streamline the City's permit process.

Our focus for the coming weeks will be twofold. First will be ongoing support for the improvements developed in our original effort. Second will be implementation of the Springbrook[®] Building Permit (BP) module.

Task 1 – Ongoing Support

Requested Task Budget \$8,000

We will continue to support the team with ongoing, on-call assistance for the following:

- Facilitation of the new Development Review (DR) meetings where the team assembles to integrate project review findings and make approval or correction letter decisions.
- Reinforcement on the use of the Dashboard at case setup, reviewer selection of the next project to review, entering review conclusions, posting daily status online, and using the Dashboard to monitor City performance and set the weekly DR meeting agenda.
- Oversight as the team completes the remaining intake checklists and procedures using the templates produced for the initiative.
- Project management of the initiative to maintain pace and focus across the team per the targeted implementation dates.
- Additional training on use of the new procedures.
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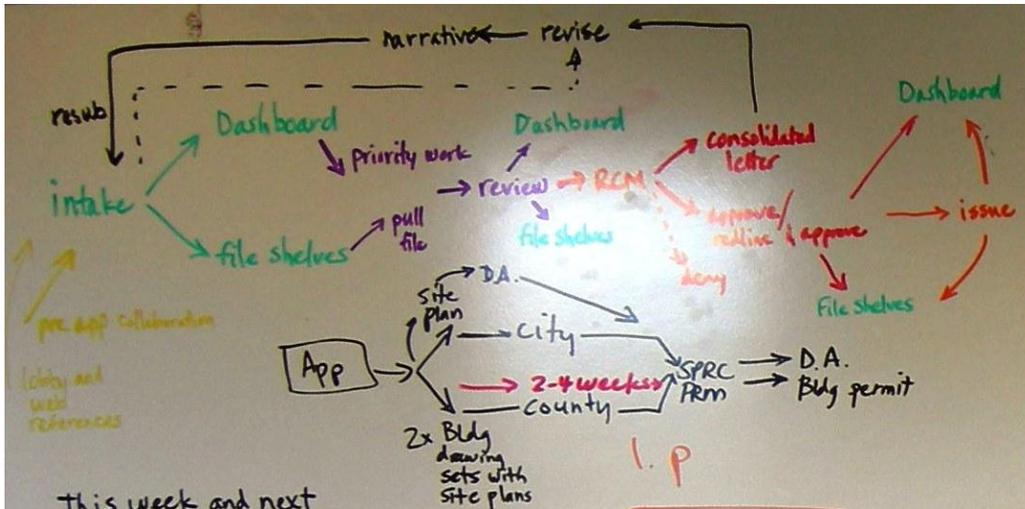


Figure 1 - Process Architecture

1. Lobby and Web References – Sept 15
2. Intake Checklists (Fig. 2): Implement in four batches, one each month, providing one month's notice and lead time for application transition.

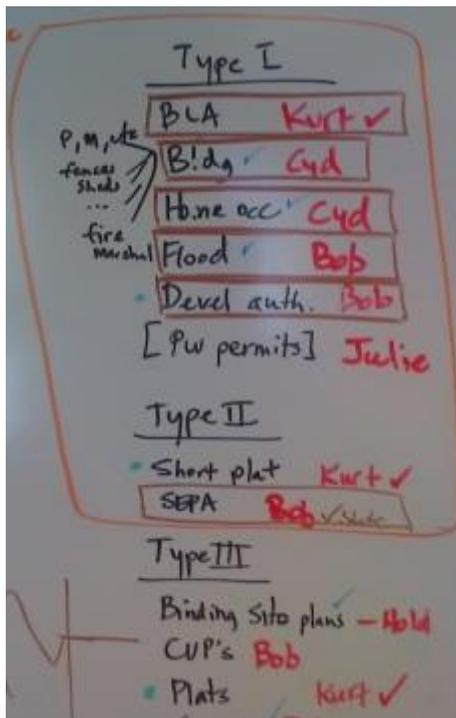


Figure 2 - Intake Checklists

- a. Batch #1 (Type I and SEPA)
 - i. Complete by **September 1**
 - ii. Effective **October 1**
 - iii. Checklists include:
 1. Boundary line adjustment
 2. Building permit
 3. Home occupation
 4. Flood permit
 5. Development authorization
 6. SEPA checklist (State version from ORA)
- b. Batch #2 (Type II)
 - i. Complete by **October 1**
 - ii. Effective **November 1**
 - iii. Checklists include:
 1. Short plat
- c. Batch #3 (Type III)
 - i. Complete by **November 1**
 - ii. Effective **December 1**
 - iii. Checklists include:
 1. Shoreline permits
 2. Conditional Uses
 3. Subdivisions (Formal)
 4. Binding site plan (as revised)
 5. PUD (as revised)

- d. Batch #4 (Type IV)

- i. Complete by **December 1**
 - ii. Effective **January 1**
 - iii. Checklists include:
 - 1. Final plat
 - 2. Site-specific rezone
- 3. Pre-Application Letter template – **September 30**
- 4. Intake by Appointment (Type III) – **September 30**
- 5. Economic Development Assistant for Commercial Projects (Donna) – **July 1**
- 6. Julie primary backup for Cyd – **Progressive: keyed to intake checklist batches**
- 7. Notice Boards at Type II intake (optional DNS) – **October 31**
- 8. Hearing Examiner materials format – **After School District CUP decision**
- 9. Springbrook – **As determined under Task 2**
- 10. Development Authorizations – **October 31**
- 11. Code Changes to implement Improvements – **as required**

Task 2 – Implement Springbrook[®]

Requested Task Budget \$20,000

Completing our twofold focus is implementation of the Springbrook[®] BP module. The main elements of this effort are the following, which are typical for implementation of a permit tracking system. The main steps are:

1. Set up the file system, and test and production modules with sufficient space and performance to contain our information.
2. Choose our process (we did that this spring) though now we have to add inspection logic
3. Encode this process into Springbrook[®] in the form of case templates, one per permit or land use action type, that specify our required plan review and inspection approvals.
4. Add our fee tables to these case templates, mapped to Finance general ledger accounts.
5. Prepare and link template documents (receipts, permits, certificates, letters, etc.).
6. Establish a parcel number maintenance approach to keep these current as lots subdivide.
7. Coordinate our remaining paper management methods with the new digital methods.
8. Transfer selected data from old systems and decide our legacy record management.
9. Activate the online features.
10. Test and train.
11. Implement.
12. Retire the superseded procedures and tools.

The Latimore Company will lead and coordinate this effort that will engage most if not all of the team in preparations. This will be very hands-on for the team. We look to the following for these sets of items:

- IT team for items 1 and 9 with a supporting role in items 6, 8 and 12.
- Finance team for item 4 with a supporting role in items 5 and 12.
- Review team (including the County for inspection logic) for items 2, 3, 6, 8, and 12.
- Admin team (our Permit Assistant, Utility Clerk/Receptionists and Admin Secretary) for items 5 and 7 with a supporting role in items 3, 4, 8, and 12.
- Our entire team for items 10 and 11.
- We can take the opportunity here for Public Works to add their respective development permits into the system at the same time in the same way.

Springbrook would need to help as well by providing the latest version updates, documentation, and helpdesk support.

Springbrook Schedule

Figure 3 indicates the rough schedule for the Springbrook BP module implementation tasks. This is dependent on when we start and other team workload.

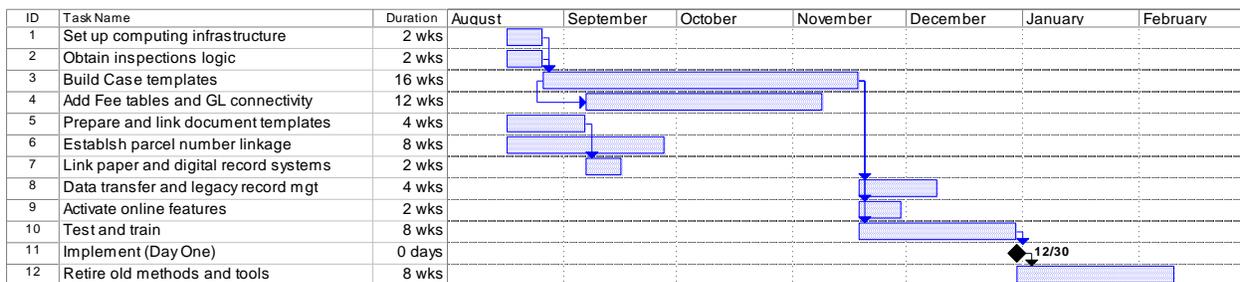


Figure 3 - Springbrook BP Module Implementation Schedule

Budget Summary

As indicated, the requested budget for these two tasks is:

Task 1 (Support)	\$ 8,000
Task 2 (Springbrook)	<u>\$20,000</u>
Total	\$28,000

Thank you

Thank you again for this opportunity to continue to serve the citizens of the Great City of Sultan by working together to streamline the City's permit process.

Regards,
 Kurt Latimore, Member
 The Latimore Company, LLC