MEMORANDUM

CSFRA, Community Development Department

DATE: February 12, 2018

TO: Rental Housing Committee

FROM: Anky van Deursen, Associate Planner
Roger Jensen, CIO/Information Technology Director

SUBJECT: **CSFRA Information Technology System**

RECOMMENDATION

That the Rental Housing Committee review the Request for Proposals technical requirements related to selection of an information technology vendor to develop an information technology system to implement the Community Stabilization and Fair Rent Act (CSFRA) effectively and efficiently.

BACKGROUND

Due to the scope and breadth of the Community Stabilization and Fair Rent Act (CSFRA), with over 15,000 rental units being covered by the program, implementing the CSFRA in an effective and efficient manner will require a reliable, well-functioning information technology (IT) system that is able to receive, store, and retrieve a potentially significant volume of data. The system should be able to run key reports, look up pertinent information related to CSFRA units, and facilitate compliance with the CSFRA. Additionally, a system that can communicate with other City programs and systems, such as the Multi-Family Inspection Program or the fee billing process, can greatly streamline key parts of CSFRA administration. All cities in California with a rent stabilization program use an IT system to help administer their programs.

On September 11, 2017, the Rental Housing Committee (RHC) directed staff to present three options for a CSFRA IT system: (1) a lean IT system; (2) a medium IT system; and (3) a robust IT system.

On October 9, 2017, the RHC reviewed these three options for an IT system for implementation of the CSFRA. The RHC decided to budget for the development of a proposed "medium IT system," and to allow the RHC to review the Request for

Proposals (RFP) requirements related to selection of an IT vendor to develop such system.

ANALYSIS

Although land management systems are available, customization by a professional services organization would be required before it could support a medium IT system for the CSFRA. The costs for a medium IT system are estimated to be about $65,000 to $75,000 annual licensing costs and about $125,000 to $175,000 for start-up development costs. Purchases of this size by the City would have to go through the standard purchasing procedures, including developing an RFP, evaluating proposals and interviewing vendors, and completing the purchase. The purchasing process would take five to six months, with an additional six months to implement the system. Staff has been in contact with several cities using or evaluating systems and have identified the most important features for the RFP. Staff is considering two types of systems: traditional land management systems that can be customized to support a Rent Stabilization System, and custom systems developed specifically for this function.

Per direction from the RHC, please find attached the technical requirements of the medium IT system as further developed into an RFP, containing the following key elements:

Medium IT System

The medium IT system will either utilize a standard, off-the-shelf land management system customized to support this function, or a dedicated system developed for rent stabilization needs. The goal of this system is to provide core functionalities for efficient and timely collection and prompt processing and analyzing of rental property data. At the same time, it delivers a user-friendly web portal to allow landlords and tenants, through a secure end-user log-in, access to the system. Staff has developed the following requirements to be included in the City's RFP:

1. **General System Requirements—All Users**

    1.1. Web-based client interface; no custom client software is required. Should support Internet Explorer, Chrome, Safari, and Firefox.

    1.2. Role-based access to application features.

    1.3. Integration with third-party systems for user log-in authentication.

    1.4. Responsive design user interface.

1.5. Manage user preferences for access, frequently used reports.

1.6. Customizable data entry screens to support additional functionality, such as detailed unit information and exemption status.

1.7. Support Mountain View branding.

2.   City Administration Requirements

2.1. Property Inventory Management

2.1.1. Upload property inventory from County Assessor or City sources.

2.1.2. Manage property owner data.

2.1.3. Support property APN splits and mergers.

2.1.4. Support multiple addresses/multiple buildings for parcels.

2.1.5. Maintain property ownership history.

2.1.6. Support real-time integration with City GIS system (ESRI).

2.2. Property Registration Module

2.2.1. Support rules settings for rent increases and verify compliance of rent increases.

2.2.2. Add/register property on behalf of owner.

2.2.3. Manage tenant information.

2.2.4. Manage owner information.

2.2.5. Manage contact information.

2.2.6. Manage property details.

2.2.7. Upload documents.

2.2.8. Generate RSO Certificate.

2.2.9. Tag properties for hold, exception, etc.

2.3. Case Management Module

2.3.1. Case LifeCycle management functions from case intake to closure with flexible workflow.

2.3.2. Rent increase request case management.

2.3.3. Eviction request case management.

2.3.4. Complaints case management.

2.4. Customer Relationship Management (CRM) Module

2.4.1. Manage contacts (create, modify, delete, group, search).

2.4.2. Notification—e-mail, SMS, account.

2.4.3. Campaign Management—e-mail, account (marketing, outreach).

2.4.4. Support integration with third-party bulk mail system.

2.5. Reporting and Analytics

2.5.1. Role-based dashboards.

2.5.2. Fixed reports.

2.5.3. Ad hoc reports.

2.5.4. Ability to export reports to pdf.

2.5.5. Ability to export reports to Microsoft Excel.

2.5.6. API for integration with BI application such as Microsoft BI, Tableau.

3. Owner/Property Manager Features

3.1. In addition to the General System requirements:

    3.1.1. ADA-compliant.

    3.1.2. Multilingual.

    3.1.3. Provides communication tool between landlords and tenants.

3.2. Property Registration

    3.2.1. Add/register properties (multiple properties allowed).

    3.2.2. Manage tenant information.

    3.2.3. Manage owner information.

    3.2.4. Manage contact information.

    3.2.5. Manage property details.

    3.2.6. Bulk upload of tenant data (from CSV file).

    3.2.7. Upload documents.

3.3. Service Requests

    3.3.1. Service request for rent increase.

    3.3.2. Service request for eviction.

3.4. Payment

    3.4.1. Payment of fees/penalties/charges.

4. **Tenant Features**

    4.1. In addition to the General System requirements:

        4.1.1. ADA-compliant.

        4.1.2. Multilingual.

    4.2. Feature Requirements

        4.2.1. Complaint/service request.

        4.2.2. Review property RSO Status.

        4.2.3. Review unit details.

5. **Integration Support**

    5.1. Integrate or provide data exports to the City's financial and utility billing systems.

    5.2. Export property location information to City's ESRI.

    5.3. Support single-sign-on (SSO) with MS Active Directory or ADFS.

    5.4. Allow City staff access to other departments' systems to view activities related to the property, e.g., inspection reports, building permits, etc.

FISCAL IMPACT

The expenses for the medium IT system are incorporated into the Fiscal Year 2017-18 budget.

PUBLIC NOTICING — Agenda posting.

AvD-PJK/AK/3/CDD/RHC
895-02-12-18M-E