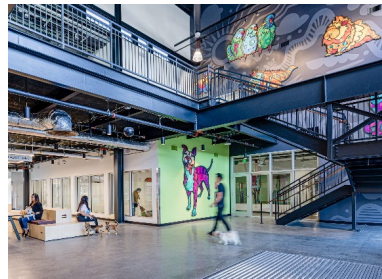Sept. 11, 2025

Clariti Implementation

Bernie Tse
Project Manager

Objectives

- **Clariti project background**

- **Project implementation timeline**

- **Project implementation status**

- **Project implementation next steps**

- **Contract modification status**

- **Added scope and funding request**

- **Update/connection to the PermitSF initiative**

- **Q & A**

Project background

- **March 2022**: Kickoff of original implementation from 2021 Tech Marketplace ("TM") contract, utilizing third-party system integrator, Avocette Technologies

- **May 2024**: Commission approves Clariti Permitting and Inspections Software Licensing Agreement ($2,716,005) with a contract duration of 2,816 calendar days

- **October 2024**: Public Works discusses project timeline concerns with software vendor (Clariti)

- **March 2025**: Clariti takes over system configuration and integration from Avocette and agrees to release system in two phases:
    - Phase 1 system activation: January 2026
    - Phase 2 system activation: Winter 2026/27

- **April 2025**: Official project kickoff

- **Phase I implementation reveals additional need for integrations not anticipated during RFP process:**

Project implementation timeline

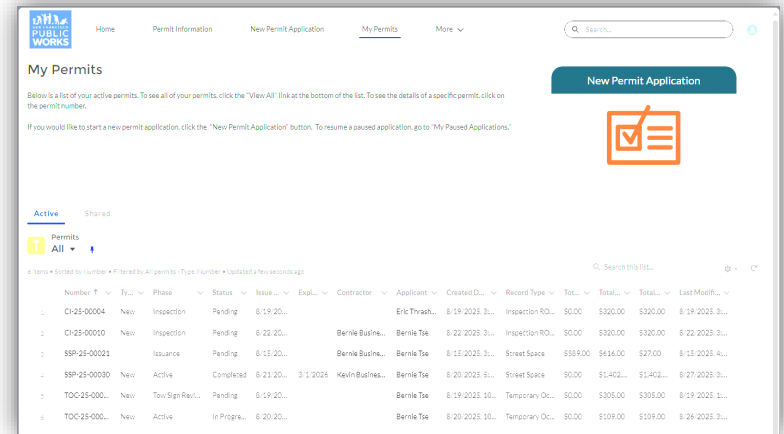|	May	June	July	August	September	October	November	December	January	February
Stage 1: Project Initiation & Setup										
Project Kickoff & Tooling Setup			MAY 28-JUN 5							
Solution Pre-Configuration			MAY 29-JUN 18							
Resource Allocation and Orientation			MAY 28-JUN 4							
Stage 2: Requirements Confirmation										
Interface Discovery and Planning			JUN 2-JUN 23							
Confirmation Sessions + Interviews			JUN 19-JUL 8							
Stage 3: Build										
Integration Development							JUL 9-OCT 22			
System Configuration – Iteration 1				JUL 9-AUG 5						
System Configuration – Iteration 2					AUG 6-SEP 2					
System Configuration – Iteration 3						SEP 3-SEP 30				
System Configuration – Iteration 4							OCT 1-OCT 28			
Stage 4: Inspect & Train										
Train the Trainer Training								OCT 29-NOV 25		
Administrator Training									NOV 26-DEC 9	
UAT Cycle 1									DEC 3-DEC 24	
UAT Cycle 2										JAN 5-JAN 14
Stage 5: Go-Live Prep										
Go-Live Deployment Plan Alignment									DEC 3-DEC 9	
Go Live Deployment										JAN 20
Warranty Period										JAN - FEB
Transition to Support										

⭐ Go-Live

The complete timeline can be found on Smartsheet here. Timeline is subject to change.

Project implementation status

- **Public Works staff completed iteration No. 1 hands-on testing**
  - Public-facing application portal
  - "Happy path" permitting workflow

- **Development team has completed iteration No. 2 configuration**
  - Applicant self-registration portal
  - "Unhappy path" workflow
  - Permit extension request
  - Email notification
  - Automated permit/tow sign creation

- **Completed integrations**
  - Treasurer & Tax Collector Business License
  - California State Contractor License
  - Public Works address and parcel data

Project implementation next steps
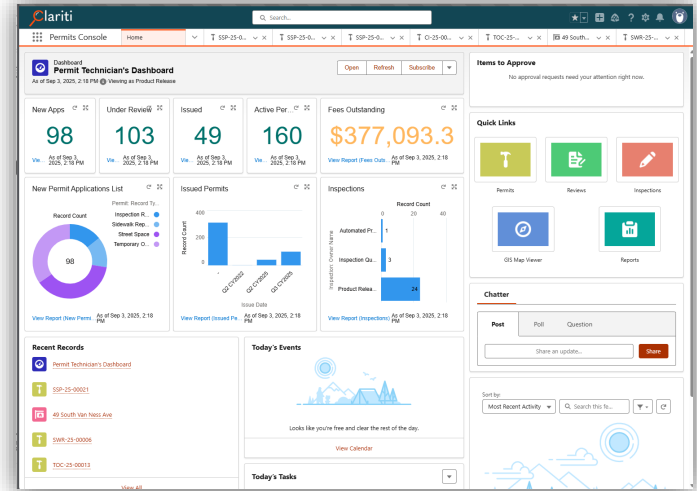

- **Ongoing integrations**
    - City Base / Euna – payment processor
    - GIS mapping data
    - Public Works data warehouse

- **Iteration No. 3**
    - Permit modification requests
    - Inspection process
    - Financial reconciliation – settle codes and GL accounts
    - Automated First Year Free program and building permit validation
    - Street segment identification

- **Public feedback pilot proposal**
    - When: November 2025
    - What: Open the online portal to City-selected group of residents and applicants for early access and feedback
    - Goal: Collect actionable feedback on usability, accessibility and overall experience before full go-live in January

Contract modification status

- **Completing negotiations with Clariti to migrate remaining project implementation (began in 2021 through a Technology Marketplace contract) into 8-year licensing agreement**

- **Remaining funds from 2021 contract will be added into new contract with Clariti**

- **Pending Commission approval, language to incorporate added scope and costs for added scope to be integrated**

Added scope

Over the last several months, analysis sessions involving Clariti and various other City departments have revealed the need for additional scopes not outlined within the original RFP:

- Treasurer & Tax Collector's Office has requested the addition of "lockbox" workflow for processing of mailed-in check payments

- Document management platform for future integrations with other systems

- Annual software support services for duration of contract

Update/connection to the PermitSF initiative

- **Citywide Direction:** Following a RFI earlier this spring, the City has selected OpenGov to serve as the "One Front Door" platform for permitting.

- **Phased Migration:** All permitting activity across City departments will migrate to OpenGov over time. Timeline and sequencing are still being developed.

- **Public Works Status:**
  - Public Works will migrate to OpenGov in a future phase
  - Clariti will be our interim permitting system

- **Collaboration:** Public Works is working with the Mayor's Office of Innovation to share best practices and lessons learned from the Clariti implementation to help inform the broader City transition.

QUESTIONS