

**OCA Solicitation Waiver Request**

Manage Attachments (2): San Francisco OpenGov Pricing 9.23.25.png [rename] [view] OpenGov - Sole Source Letter - San Francisco.pdf [rename] [view]

| Draft | Dept. Head | OCA Admin | Supervising Purchaser | Asst./Director | Completed | Rejected |
|-------|------------|-----------|-----------------------|----------------|-----------|----------|
|-------|------------|-----------|-----------------------|----------------|-----------|----------|

Complete the form below to justify a request to waive or modify solicitation requirements for purchases greater than \$20,000. An approved request is limited to the amounts stated in the submission. Your request will then be reviewed by the Office of Contract Administration (OCA).

For technical help with this application, please reference OCA's Solicitation Waiver User Guide or email [adm.contracting.in.servicenow@sfgov.org](mailto:adm.contracting.in.servicenow@sfgov.org). For all other questions, please contact [OCA@sfgov.org](mailto:OCA@sfgov.org).

\*Effective January 4, 2024, all solicitation waiver requests must comply with updated guidelines set forth by the Office of Contract Administration (OCA).

|                                     |                     |                       |                     |
|-------------------------------------|---------------------|-----------------------|---------------------|
| Number                              | OCAWVR0012344       | Request Status        | Completed           |
| Requested for                       | Sarah Bindman       | Waiver Type           | Solicitation Waiver |
| Department Head/Delegated authority | Florence Simon      | Requesting Department | ADM                 |
| Opened                              | 2025-09-22 13:21:05 | Requester Phone       |                     |
|                                     |                     | Opened by             | Sarah Bindman       |
|                                     |                     | Watch list            |                     |

|                   |                                                                                                         |
|-------------------|---------------------------------------------------------------------------------------------------------|
| Short Description | Technology solution to support modernizing and streamlining the permitting process inter-departmentally |
|-------------------|---------------------------------------------------------------------------------------------------------|

Enter 10-digit Supplier ID. Click the 'Supplier ID' link below to see a full list of Supplier IDs. If Supplier ID is not applicable for this waiver request due to bid requirements, please enter 0000000000.

|                                                                         |                             |                            |                |
|-------------------------------------------------------------------------|-----------------------------|----------------------------|----------------|
| Supplier ID                                                             | 0000053406                  | Increase Amount            | \$1,900,000.00 |
| Is this a new waiver or are you modifying a previously approved waiver? | Modification – Prior Waiver | Previously Approved Amount | \$4,000,000.00 |
| Last Approved OCA Waiver Request                                        | OCAWVR0012259               | Total Requested Amount     | \$5,900,000.00 |
| Document Type                                                           | Contract                    | Enter Contract ID          | 1000036689     |

Contract/Purchase Type (Select all that apply.)

- ☐ Advertising
- ☐ Commodities, Equipment and Hardware
- ☐ Equipment and Vehicle Lease
- ☐ Online Content, Reports, Periodicals and Journals
- ☐ Software as a Service (SaaS) and Cloud Software Applications
- ☐ On Premise Software and Support
- ☐ Professional and General Services
- ☐ Vehicles and Trailers

Select the reason for this request. Based on your selection, a tab will appear below with questions

- ☐ Regulation 21.5(b): No Substitute for Product/Service and Only One Source (No Bid Required).
- ☐ Regulation 21.5(b): No Substitute for Product/Service but More than One Source (Bid Required).
- ☐ Regulation 21.5(c): Perishable foods
- ☐ Regulation 21.5(d): Proprietary Articles and Only One Source (No Bid Required)
- ☐ Regulation 21.5(d): Proprietary Articles but More than One Source (Bid Required)
- ☐ Regulation 21.5(e): Pilot Project with a Term Not to Exceed Two Years
- ☐ Regulation 21.16(b): Reciprocal Agreements with Other Public and Non Profit Agencies
- ☐ Regulation 21.16(c): Solicitations for Multiple Departments
- ☐ Regulation 21.30: Proprietary Software Licenses and Support and Proprietary Equipment Maintenance

Briefly describe the product or service you are seeking and its business purpose.

**Updated information:**

We originally submitted a waiver request based on a preliminary estimate of the funding required to execute the first phase of our project with OpenGov. As we've refined the scope of work, we've gained a clearer understanding of the effort and resources needed. We are updating our funding request to reflect this more accurate assessment.

We are planning to move forward with a 1-year term for the software agreement. While a longer-term contract offered more favorable pricing, the 1-year term provides greater flexibility and risk mitigation at this stage. While our goal is to establish a long-term multi-departmental permitting system solution, we believe it is prudent to deliver value for a first set of departments before scaling to a wider scope and timeline.

**Information from previous submittal:**

San Francisco's permitting system plays a critical role in enabling residents to build and improve buildings, open and operate businesses, and perform other functions for those who live, work in, and visit San Francisco. Yet today, the permitting process is fragmented and difficult to navigate. Applicants must work across multiple departments with different requirements, forms, and review timelines. They often re-enter the same information into separate systems, follow unclear instructions, and struggle to track the status of their applications. These challenges lead to costly delays and uncertainty for residents and small businesses and limit the City's ability to meet urgent housing and economic development goals. To confront these challenges, Mayor Daniel Lurie's February 13, 2025 Executive Directive called for bold, transformative action: "We must create a permitting process that holds us accountable to our customers, embraces technology, and is fast, predictable, and transparent." This Executive Directive launched PermitSF, a priority initiative to centralize and modernize San Francisco's permitting system. PermitSF is focused on building a centralized system that simplifies the applicant experience, coordinates departmental workflows, and provides real-time transparency into performance. The goal is for anyone applying for a permit to be able to start in one place, follow a simple and predictable process, and receive a timely decision from the City.

OpenGov offers a Permitting and Liscensing platform which will allow us to meet our ambitious permit reform iniative by allowing multiple CCSF Departments to intake permit requests, coordinate reviews across Departments, and issue permits in a timely manner. Ultimately this platform will serve as the centralized tool for all Departments to manage their permitting workflows.

**OCA Admin****OCA Admin**

Sunny Woo

**OCA Admin Decision**

Reviewed and approved

**OCA Admin Comments:**

For your review / approval

**OCA Supervising Purchaser**

Paul Cheng

**OCA Assistant Director**

Lorna Walker

**OCA Supervising Purchaser****OCA Supervising Purchaser**

Paul Cheng

**Supervising Purchaser Decision**

Reviewed and approved

**OCA Supervising Purchaser - Selections based on admin code**

- ☐ Regulation 21.5(b): No Substitute for Product/Service and Only One Source (No Bid Required).
- ☐ Regulation 21.5(b): No Substitute for Product/Service but More than One Source (Bid Required).
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- ☐ Regulation 21.5(d): Proprietary Articles and Only One Source (No Bid Required)
- ☐ Regulation 21.5(d): Proprietary Articles but More than One Source (Bid Required)

**Reason for Determination (Supervisor):**

This waiver request is an amendment to previously approved Waiver ID OCAWVR0012259 for the purpose of increasing the Requested Amount in response to the Department's subsequent negotiations and further refinement and development of the scope of work. The price proposal remains consistent, in structure and pricing, with OpenGov's pricing model available through the NASPO contract which was referenced in the original approved waiver request.

Based on the above and supporting documents, I recommend this waiver amendment request for approval.

**OCA Asst./Director****OCA Assistant Director**

Lorna Walker

**Asst./Director Decision**

Reviewed and approved

**OCA Asst./Director - Selections based on admin code**

- ☐ Regulation 21.5(b): No Substitute for Product/Service and Only One Source (No Bid Required).
- ☐ Regulation 21.5(b): No Substitute for Product/Service but More than One Source (Bid Required).
- ☐ Regulation 21.5(c): Perishable foods

- ☐ **Regulation 21.5(e): Pilot Project with a Term Not to Exceed Two Years**
- ☐ **Regulation 21.16(b): Reciprocal Agreements with Other Public and Non Profit Agencies**
- ☐ **Regulation 21.16(c): Solicitations for Multiple Departments**
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- ☐ **Regulation 21.5(d): Proprietary Articles but More than One Source (Bid Required)**

**Reason for Determination (Asst./Director):**

This waiver request seeks to amend the previously approved Waiver ID OCAWVR0012259 for the procurement of permitting and licensing software from OpenGov, Inc. ("OpenGov"). The amendment is necessary to increase the Requested Amount in response to the Department's subsequent negotiations and further refinement and development of the scope of work. The updated price proposal remains consistent, in structure and pricing, with OpenGov's pricing model available through the NASPO contract, which was referenced in the original approved waiver request. Additionally, per the attached letter and as stated in the original waiver, these professional services can only be provided by OpenGov.

Based on the above and supporting documents, the waiver amendment is approved.

**Regulation 21.30****Please choose all that apply**

- ☐ **New software not previously purchased (Do not check if this is an upgrade)**
- ☐ **Upgrade of previously purchased software**
- ☐ **Standard Support for previously purchased software/hardware**
- ☐ **Technical Services for previously purchased software/hardware**

1. For all requests, did you upload a letter from the Supplier confirming that this software or equipment maintenance (whichever is applicable) is proprietary in nature and can only be purchased from the proposed Supplier?

YES

2. If you selected "New software" or "Upgrade of previously purchased software", answer each question below:

a. What is the purpose of this software?

San Francisco's permitting system plays a critical role in enabling residents to build and improve buildings, open and operate businesses, and perform other functions for those who live, work in, and visit San Francisco. Yet today, the permitting process is fragmented and difficult to navigate. Applicants must work across multiple departments with different requirements, forms, and review timelines. They often re-enter the same information into separate systems, follow unclear instructions, and struggle to track the status of their applications. These challenges lead to costly delays and uncertainty for residents and small businesses and limit the City's ability to meet urgent housing and economic development goals. To confront these challenges, Mayor Daniel Lurie's February 13, 2025 Executive Directive called for bold, transformative action: "We must create a permitting process that holds us accountable to our customers, embraces technology, and is fast, predictable, and transparent." This Executive Directive launched PermitSF, a priority initiative to centralize and modernize San Francisco's permitting system. PermitSF is focused on building a centralized system that simplifies the applicant experience, coordinates departmental workflows, and provides real-time transparency into performance. The goal is for anyone applying for a permit to be able to start in one place, follow a simple and predictable process, and receive a timely decision from the City.

OpenGov offers a Permitting and Licensing platform which will allow us to meet our ambitious permit reform initiative by allowing multiple CCSF Departments to intake permit requests, coordinate reviews across Departments, and issue permits in a timely manner. Ultimately this platform will serve as the centralized tool for all Departments to manage their permitting workflows.

b. Why this is the only software that will meet the City's needs?

CCSF conducted a rigorous and collaborative evaluation process to identify a software solution that meets our complex, cross-departmental permitting needs and ambitious timeline. As part of this process, we issued a Request for Information (RFI) and received over 50 responses from a wide range of vendors. Each vendor was carefully evaluated for its ability to meet our product requirements, deliver on time, and provide a user-friendly experience for both staff and applicants. The RFI was led by the Mayor's Office in partnership with ADM, Planning, DBI, DPW, DT, SFFD, and other departments. We engaged end users, subject matter experts, technical staff, and leadership across departments to ensure a comprehensive and well-rounded assessment.

OpenGov emerged as the only vendor that could meet our specific combination of needs: delivering a permitting portal with excellent usability for both internal staff and public applicants, meeting all of our product requirements, and demonstrating a proven track record of delivering similar solutions on time. During our evaluation, we spoke with several municipalities that had implemented OpenGov's cross-departmental permitting solutions. These agencies consistently reported positive experiences, particularly highlighting OpenGov's ability to appropriately scope complex projects and deliver tangible value across departments. In fact, multiple jurisdictions noted that OpenGov not only met their expectations but exceeded them by delivering ahead of schedule. This strong track record of timely and value-driven delivery gave us confidence in OpenGov's ability to meet the CCSF's needs effectively and reliably.

Given this thorough evaluation process and the unique ability for OpenGov to meet our product and timeline requirements, it is the best software to meet the City's needs.

c. What efforts were made to obtain the best possible price?

OpenGov provided a preliminary cost estimate in their RFI response, which gave us an early understanding of their pricing structure. In addition to the RFI pricing, we reviewed multiple reference points, including pricing from a cooperative purchasing agreement and recent contracts from other public agencies. These benchmarks helped us assess the competitiveness of OpenGov's proposal and will continue to inform our negotiation strategy to ensure CCSF receives fair and cost-effective terms.

Elaborating on what we learned from the cooperative purchasing agreement - On December 21, 2015, the State of Utah—on behalf of NASPO ValuePoint participating states—issued a Request for Proposal titled NASPO ValuePoint Cloud Solutions (#CH16012). This solicitation resulted in 38 contract awards, with a maximum contract term from October 14, 2016, to September 15, 2026. Carahsoft was one of the 38 awarded vendors. Included in Carahsoft's offerings were all the modules and professional services that OpenGov has proposed as part of its permit management system for CCSF. OpenGov's NASPO pricing is structured based on the annual budget of the purchasing entity (e.g., a set price for a public entity with an annual budget of \$100–150 million, a different set price for an entity with a \$10–15 billion budget, etc.).

Updated from previous iteration:  
The pricing in OpenGov's proposal is consistent with their NASPO-based pricing model and provides a discount (approximately 16% off the list price) for the SaaS and services proposed for CCSF. Please see the attachment which outlines the NASPO pricing per module as well as the rate OpenGov is offering CCSF. The price proposal comes from the fact that OpenGov has indicated the cost of professional services will be roughly \$1.9 million in addition to \$4.0M in SaaS costs.

Activities

- Activity
- 2025-09-24 17:51:21 **Lorna Walker** - Changed: State
- State: Completed was: Work in Progress
- 2025-09-24 12:11:04 **Florence Simon** - Changed: State
- State: Work in Progress was: Open
- 2025-09-22 13:26:45 **Sarah Bindman** - Changed: Impact, Opened by, Priority, State
- Impact: 3 - Low
- Opened by: Sarah Bindman
- Priority: 4 - Low
- State: Open

Additional comments:

| Approvers                    |                |                                  |                     |          | 1 Approvals |
|------------------------------|----------------|----------------------------------|---------------------|----------|-------------|
| Approval for = OCAWVR0012344 |                |                                  |                     |          |             |
| State                        | Approver       | Approving                        | Created             | Comments |             |
| Approved                     | Florence Simon | <u>OCA Waiver: OCAWVR0012344</u> | 2025-09-24 11:38:28 |          |             |

| Other Requests by same requester |                     |         |                          |                   | Requested for = Sarah Bindman AND Active = true                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |  |             |                  | 8 OCA Waivers     |  |
|----------------------------------|---------------------|---------|--------------------------|-------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--|-------------|------------------|-------------------|--|
| Number                           | Active Activity due |         | Additional assignee list | Approval          | Approval history                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |  | Assigned to | Assignment group | Business duration |  |
| OCAWVR0012130                    | true                | UNKNOWN |                          | Not Yet Requested | <div>2025-08-18 13:39:55 - Sarah Dennis-Phillips (Approval history)</div> <div>Sarah Dennis-Phillips approved the task.</div> <div>Approval comments:</div> <div>2025-08-18 13:39:55 - Sarah Dennis-Phillips (Comments)</div> <div>reply from: sarah.dennis-phillips@sfgov.org</div> <div>Ref:TIS6066249_XqdFBLs3jemppGNaexpf</div> <div>Sarah Dennis Phillips</div> <div>Planning Director</div> <div>San Francisco Planning</div> <div>49 South Van Ness Avenue, Suite 1400, San Francisco, CA 94103</div> <div>415.628.7411</div> <div>www.sfplanning.org&lt;http://www.sfplanning.org&gt;</div> |  |             |                  |                   |  |

|               |      |         |  |  |                                                                                                                       |  |  |  |  |
|---------------|------|---------|--|--|-----------------------------------------------------------------------------------------------------------------------|--|--|--|--|
|               |      |         |  |  | San Francisco Property Information Map< <a href="https://sfplanninggis.org/pim/">https://sfplanninggis.org/pim/</a> > |  |  |  |  |
|               |      |         |  |  | 2025-08-16 12:24:33 - Eddie Parsa (Approval history)<br>Sarah Dennis-Phillips requested to approve task               |  |  |  |  |
| OCAWVR0012194 | true | UNKNOWN |  |  | Not Yet Requested                                                                                                     |  |  |  |  |
| OCAWVR0012344 | true | UNKNOWN |  |  | Not Yet Requested                                                                                                     |  |  |  |  |
| OCAWVR0012240 | true | UNKNOWN |  |  | Not Yet Requested                                                                                                     |  |  |  |  |
| OCAWVR0012259 | true | UNKNOWN |  |  | Not Yet Requested                                                                                                     |  |  |  |  |
| OCAWVR0012252 | true | UNKNOWN |  |  | Not Yet Requested                                                                                                     |  |  |  |  |
| CMD14B0004962 | true | UNKNOWN |  |  | Not Yet Requested                                                                                                     |  |  |  |  |
| CMD14B0004968 | true | UNKNOWN |  |  | Not Yet Requested                                                                                                     |  |  |  |  |

Metrics

Table = u\_oca\_waiver AND ID = 26ad00d32b4cf2106469ff10de91bf50

6 Metrics

No records to display