From Planning to Permits, Zoning to Compliance

Research on the 50 largest U.S. cities' use of automated land management systems

A RESEARCH REPORT FROM: Accela | CENTER FOR DIGITAL GOVERNMENT

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INTRODUCTION

Ask any contractor, and they'll probably agree. The planning and permitting portion of a project has historically been a complex and time-consuming venture, riddled with inefficiency, manual processes and long waits for approval. For the average citizen (aka not an experienced contractor) trying to DIY a building project, it can be an even greater frustration. For the employees of city planning and other departments responsible for things like permitting, zoning and compliance, the sentiment is the same. Manual work, inefficient workflows and tedious processes keep governments from realizing cost efficiencies and best serving constituents.

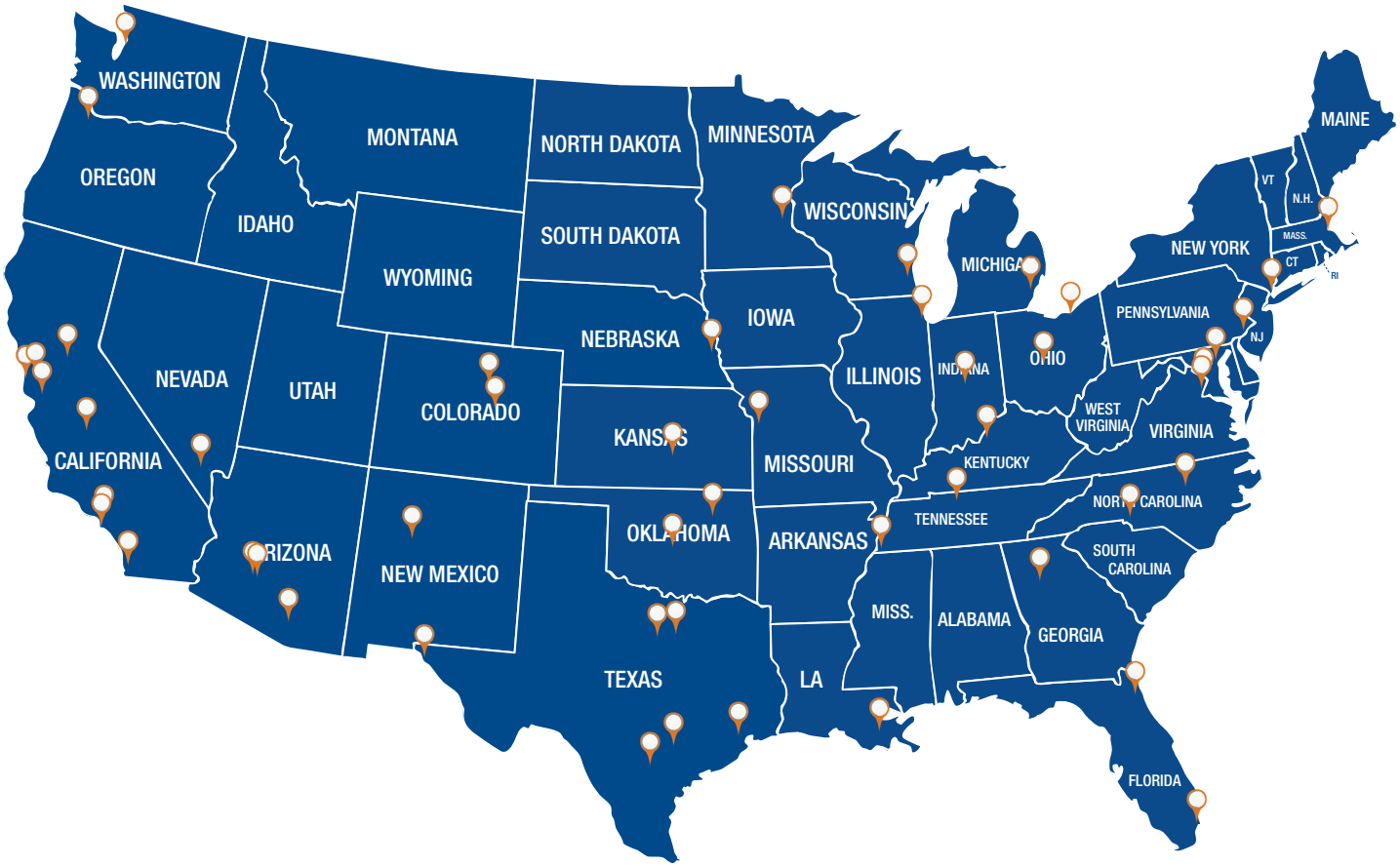
Fortunately, technology has helped eliminate inefficiency as cities adopt automated systems to streamline planning and development, simplify the permit process, enable contractors and builders to access forms online, and more. Web-based one-stop business portals and mobile access have further helped transform planning departments from complex bureaucracies to citizen-focused centers of convenience.

The technology, referred to as land management systems, is important as the systems directly impact everyday citizens and also affect revenue generated via land management activities. Because of this, it is critical for governments to invest in proven platforms with trusted vendors that have the capacity to deliver on large, high-stakes projects.

This research report provides detailed information regarding the 50 largest (by population) U.S. cities' choices in land management systems.[1] Data was gathered by the Center for Digital Government (CDG). The purpose of this document is to provide municipality leaders with information regarding the choices their peers are making in technology investments.

1. The largest cities were determined based on estimates of population from the United States Census Bureau as of 2015.

TOP 50 CITIES BY POPULATION



1.	New York, N.Y.	**14.**	Indianapolis, Ind.	**27.**	Oklahoma City, Okla.	**40.**	Virginia Beach, Va.
2.	Los Angeles, Calif.	**15.**	Columbus, Ohio	**28.**	Portland, Ore.	**41.**	Omaha, Neb.
3.	Chicago, Ill.	**16.**	Fort Worth, Texas	**29.**	Las Vegas, Nev.	**42.**	Colorado Springs, Colo.
4.	Houston, Texas	**17.**	Charlotte, N.C.	**30.**	Louisville, Ky.	**43.**	Raleigh, N.C.
5.	Philadelphia, Pa.	**18.**	Detroit, Mich.	**31.**	Milwaukee, Wis.	**44.**	Miami, Fla.
6.	Phoenix, Ariz.	**19.**	El Paso, Texas	**32.**	Albuquerque, N.M.	**45.**	Oakland, Calif.
7.	San Antonio, Texas	**20.**	Seattle, Wash.	**33.**	Tucson, Ariz.	**46.**	Minneapolis, Minn.
8.	San Diego, Calif.	**21.**	Denver, Colo.	**34.**	Fresno, Calif.	**47.**	Tulsa, Okla.
9.	Dallas, Texas	**22.**	Washington, D.C.	**35.**	Sacramento, Calif.	**48.**	Cleveland, Ohio.
10.	San Jose, Calif.	**23.**	Memphis, Tenn.	**36.**	Long Beach, Calif.	**49.**	Wichita, Kan.
11.	Austin, Texas	**24.**	Boston, Mass.	**37.**	Kansas City, Mo.	**50.**	New Orleans, La.
12.	Jacksonville, Fla.	**25.**	Nashville, Tenn.	**38.**	Mesa, Ariz.		
13.	San Francisco, Calif.	**26.**	Baltimore, Md.	**39.**	Atlanta, Ga.		

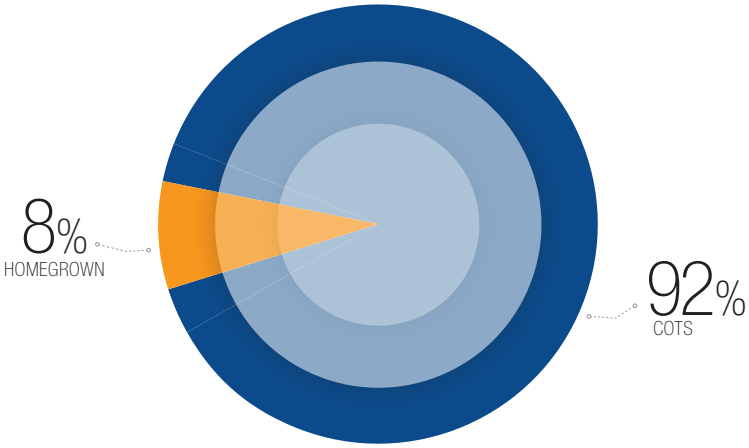
TECHNOLOGY USED BY TOP 50 CITIES

The 50 most populous cities in the U.S. are working with seven technology companies to implement their land management systems or software. These companies are:

- Accela
- Azteca Systems
- Computronix
- CSDC Systems
- Infor
- The Davenport Group
- Tyler Technologies

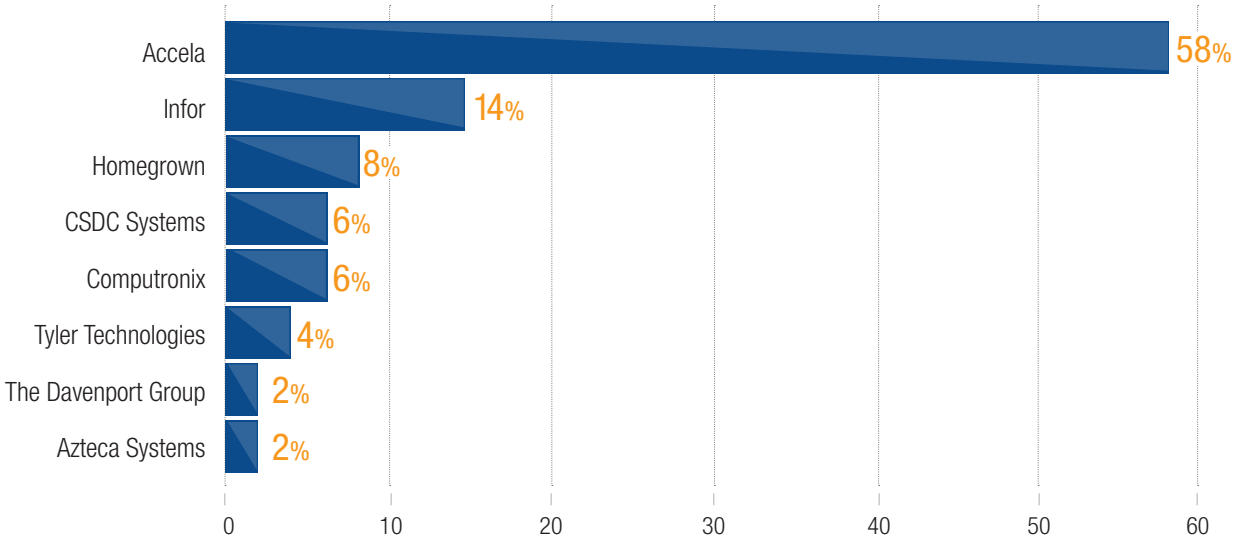
CUSTOM-OFF-THE-SHELF (COTS) VS. CUSTOM HOMEGROWN

Of the 50 cities, 92 percent have selected a COTS land management system and 8 percent (4 cities) use a custom homegrown system.



LAND MANAGEMENT SYSTEM VENDOR CHOICES

Accela is the land management software vendor in the top 50 cities with more than half of the market share. The graphic below displays the breakdown.

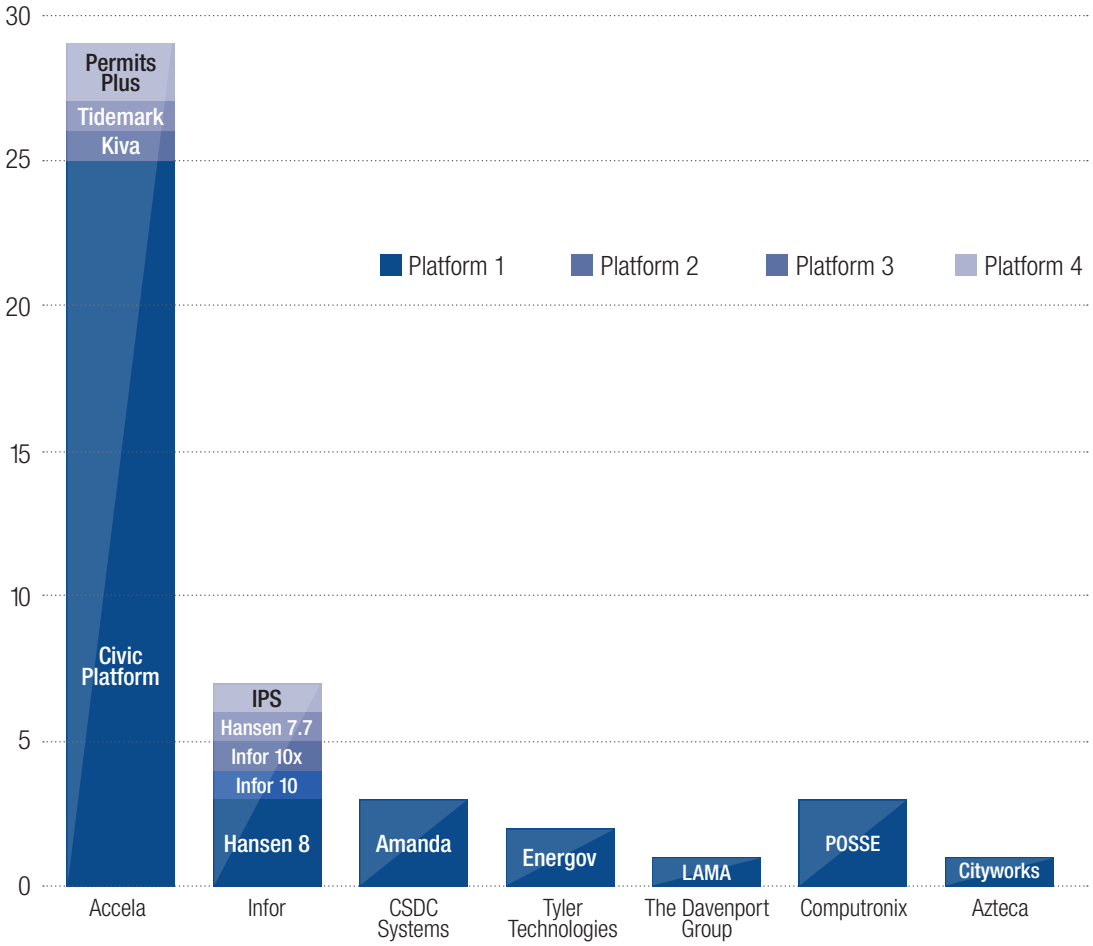


Some cities use multiple platforms of a vendor's land management technology (sometimes even multiple vendors). This is because a vendor will typically only actively market one current web-based platform, but will also have legacy platforms that remain in a few departments.

Vendors with more than one product platform installed at client sites include Accela and Infor. Accela has more than one product platform due to acquisitions of Kiva, Tidemark Advantage and Permits Plus. It has successfully migrated more than 90 cities originally on legacy platforms to its flagship platform, Accela Land Management. Infor has legacy client/server platforms that have been replaced by a web-based platform.

LAND MANAGEMENT PRODUCT PLATFORMS BY VENDOR

Given that multiple vendors maintain one or more land management platforms at client sites, it is important to analyze and compare these platforms in the top 50 cities. As previously mentioned, the vendors with multiple product platforms installed in their various respective top 50 cities include Accela and Infor. For the sake of comparison, the graph below also includes vendors that maintain a single product platform.

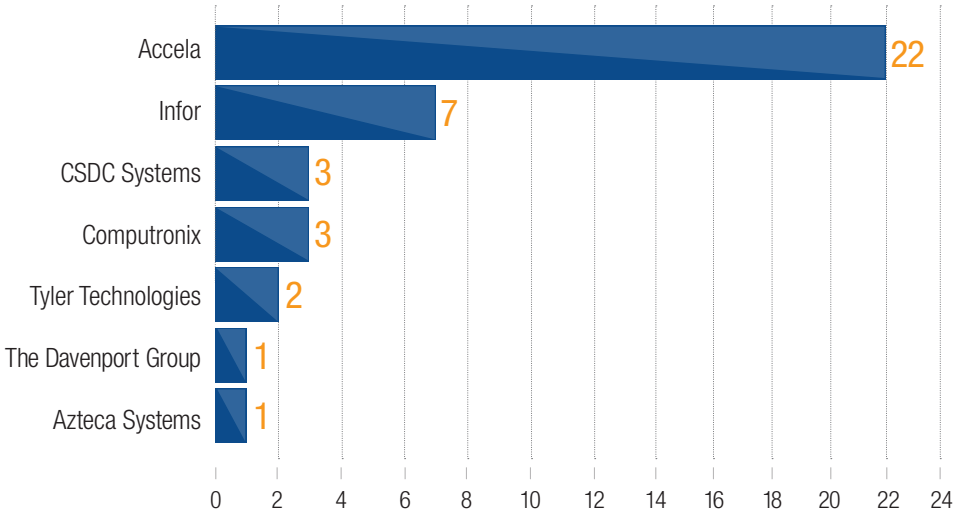


Accela's flagship system, Accela Civic Platform, is used by 25 of 50 cities. Other legacy systems acquired by Accela — Kiva, Tidemark and Permits Plus — are used by four cities combined. Infor is used by seven of 50 cities. Of those seven, three cities use Hansen 8, one uses Infor 10, one uses Infor 10x, one uses Hansen 7.7 and one uses IPS. Other vendors, including CSDC Systems, Tyler Technologies, The Davenport Group, Computronix and Azteca, are used by 10 cities combined. Each of these companies uses one platform each in the cities surveyed.

LIVE LAND MANAGEMENT SYSTEMS

It is important to note whether a city is using a current version of a vendor's given product platform and whether that system is "live," or in other words, in use. Of the 46 cities that use a COTS land management platform, 39 have live systems on current platforms. Accela platforms are used in 29 of the 50 top cities and 22 of those cities are live on the most current platform. Seven of the remaining cities are not live yet, indicating that Accela is working to move them from a legacy platform to the Accela Civic Platform.

Live Systems on Current (Non-Legacy) Vendor Platform



CONCLUSION

The information included in this report should provide valuable data for governments considering investing in a land management system or upgrading a current system. By reviewing the systems used by the top 50 cities, leaders can get a sense of trusted players in the market, as well as their commitment to migrating customers to the most current software version.

APPENDIX A: RAW DATA FOR 50 LARGEST CITIES

2015 Population Rank	City	Current Vendor	Current Land Management System	Live
1	New York	Accela	Accela Civic Platform	Yes
2	Los Angeles	Homegrown	Homegrown	Yes
3	Chicago	Homegrown	Homegrown	No
4	Houston	Infor	Hansen 8	Yes
5	Philadelphia	Computronix	POSSE	Yes
6	Phoenix	Accela	Accela Kiva	Yes
7	San Antonio	Accela	Accela Civic Platform	No
8	San Diego	Accela	Accela Civic Platform	No
9	Dallas	Computronix	POSSE	Yes
10	San Jose	CSDC	Amanda	Yes
11	Austin	CSDC	Amanda	Yes
12	Jacksonville	Homegrown	Homegrown	Yes
13	San Francisco	Accela	Accela Civic Platform	Yes
14	Indianapolis	Accela	Accela Civic Platform	Yes
15	Columbus	Accela	Accela Civic Platform	Yes
16	Fort Worth	Accela	Accela Civic Platform	Yes
17	Charlotte	Accela	Accela Civic Platform	Yes
18	Detroit	Accela	Accela Civic Platform	No
19	El Paso	Accela	Accela Civic Platform	Yes
20	Seattle	Accela	Accela Civic Platform	Yes
21	Denver	Accela	Accela Civic Platform	Yes
22	Washington D.C.	Accela	Accela Civic Platform	Yes
23	Memphis	Accela	Accela Permits Plus	Yes
24	Boston	Infor	Infor 10	Yes
25	Nashville	Azteca	Cityworks	Yes
26	Baltimore	Accela	Accela Tidemark	Yes
27	Oklahoma City	Accela	Accela Civic Platform	Yes
28	Portland	CSDC	Amanda	Yes
29	Las Vegas	Infor	Infor 10x	Yes
30	Louisville	Accela	Accela Civic Platform	No
31	Milwaukee	Accela	Accela Civic Platform	Yes
32	Albuquerque	Computronix	POSSE	Yes
33	Tucson	Accela	Accela Permits Plus	Yes
34	Fresno	Accela	Accela Civic Platform	No
35	Sacramento	Accela	Accela Civic Platform	Yes
36	Long Beach	Infor	Hansen 8	Yes
37	Kansas City	Tyler	Energov	Yes
38	Mesa	Accela	Accela Civic Platform	No
39	Atlanta	Accela	Accela Civic Platform	Yes
40	Virginia Beach	Accela	Accela Civic Platform	Yes
41	Omaha	Accela	Accela Civic Platform	Yes
42	Colorado Springs	Accela	Accela Civic Platform	No
43	Raleigh	Tyler	Energov	Yes
44	Miami	Homegrown	Homegrown	Yes
45	Oakland	Accela	Accela Civic Platform	Yes
46	Minneapolis	Infor	IPS	Yes
47	Tulsa	Infor	Hansen 7.7	Yes
48	Cleveland	Accela	Accela Civic Platform	Yes
49	Wichita	Infor	Hansen 8	Yes
50	New Orleans	The Davenport Group	LAMA	Yes

Accela provides a platform of cloud-based productivity and civic engagement software to governments of all sizes worldwide. The Accela Civic Platform includes cost-effective solutions to manage critical enterprise functions and mobile apps to foster greater citizen engagement. From asset, land and legislative management to licensing, finance, environmental health and more, Accela's software drives efficiency for more than 2,000 governments worldwide. More than 80% of America's 50 largest cities have implemented at least one of Accela's many solutions. In 2017, the Company was named to *Government Technology's* GovTech100 for the second straight year and listed as a Top 50 Private Company in the East Bay by SF Business Times. Accela is headquartered in San Ramon, California, with offices in New York, Portland, Salt Lake City, Melbourne and Amman. For more information, visit **www.accela.com**.

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