



AI-Assisted Plan Review Services Agreement

County of San Mateo & CBIZ Technology LLC

June 10, 2025

Steve Monowitz, Director of Planning and Building



Vendor: CBIZ Technology LLC

Proof of Concept (POC) Period: approximately 6 months and \$300,000 investment

Total Contract Term (assuming successful POC) : 3 Years (June 10, 2025 - June 9, 2028)

Total Contract Value: \$1,211,000

Purpose: Pilot automated AI-driven plan review of building permits



Project Overview

Modernizing Plan Review Process

AI technology pilot to streamline and enhance plan review process for building permits

AI-Powered Analysis

Automated review using machine learning trained on California and San Mateo County codes and regulations

Rule-Based, Predictive Logic Model

Not generative AI, does not function autonomously

Rapid Processing

Significantly reduced review times for common permit applications

Workflow Integration

Integration with existing Accela online permit system and electronic plan review markup software



AI Products, Automation & Integration

Three Specialized AI Tools



Blitz Residential Building Permits

Configured to Residential Code



Blitz Building Permits (Commercial)

Configured to California Building Code



Blitz Planning Permits

Configured to County zoning

UiPath Robotic Process Automation



File Transfer

Automated movement of plans from Accela to Blitz platform



Review Process

UiPath Action Center for inspector confirmation and training



Final Markup

Integration with electronic plan review software for final redlining and approval



Workflow Process

ACCELA

Plan Submission



ACCELA

Robotic Process Automation (RPA)

- Plan Review
- Code Compliance



RPA

Compliance Report

- Compliance
- Non-Compliance



Staff Review & Acceptance



Implementation Timeline

Phased Deployment Approach

Months 1-2: Blitz Residential Proof of Concept (POC)

Months 3-4: Blitz Commercial POC

Months 5-6: Blitz Planning POC

Months 7-12: Full Deployment: Complete code implementation and automation

Success Criteria (POC)

- 80% accuracy on visual markups and code detection
- 80% acceptance rate by County reviewers
- Successful integration with Accela and markup software
- 10-day error resolution timeframe



3-Year Contract Costs

Component	Year 1	Year 2	Year 3	Total
POC Development	\$150,000	-	-	\$150,000
Enterprise Subscription	\$236,000	\$360,000	\$396,000	\$992,000
UiPath Automation	\$23,000	\$23,000	\$23,000	\$69,000
Total Annual	\$409,000	\$383,000	\$419,000	\$1,211,000

Payment Structure: POC development billed 50% upfront, 50% upon acceptance. Monthly subscription billing thereafter.



Data Security

- AI will have access to data in building and planning permit applications
- Data will be hosted on secure U.S.-based cloud infrastructure
- Privacy protections to include encryption, access control, audit logs



Expected Benefits

Time Savings

Dramatic reduction in plan review turnaround times

Consistency

Standardized code interpretation and application

Resource Optimization

Allows staff to focus on complex reviews requiring human expertise

Scalability

Handle increased permit volume efficiently

Accuracy

Reduced human error in routine code compliance checks

Capacity: 20,000 Plan Submissions Annually

Designed to handle significant permit volume for San Mateo County unincorporated areas



Impacts to County Positions

- Positions that will use software directly: planners, building permit technicians, IT analysts
- Indirect impacts to: administrative staff
- Does not reduce County permanent positions
- County staff will review AI results, and retain decision-making authority to accept
- Is expected to reduce reliance on 3rd party contract plan reviewers



Consistency with County AI Resolutions

Resolution 080119 (Jan 2024): Resolution affirming the importance of maintaining County jobs during advancements in artificial intelligence

- Contract avoids job displacement and provides opportunities for employees to receive training and skill development on using AI

Resolution 081081 (April 2025): Resolution directing County departments to project the impact of artificial intelligence software implementation on the County workforce

- No County positions will be eliminated due to deployment of this AI contract
- Department will report out to Board on impacts and status in 1 year