



Order Form For:  
 Quote Number:  
 Valid Through:  
 Subscription Agreement: Version 0114a  
 Proposed By:

Upgrade: N  
 Product:

**Address Information**

Bill To:

Ship To:

Billing Email:  
 Billing Phone:

Attention:  
 Email:

**Payment Terms and Conditions**

Number of Annual Terms: 1  
 Service Start Date:  
 Service End Date:  
 Billing Frequency: Annual

Payment Method: Check  
 Payment Terms: Net 30  
 Billing Method: Email  
 PO Required: (yes/no)  
 PO Number:

**Products Terms and Conditions**

SKU	Description		Unit Price	Net Price
SS10APFMSAS0001	Accela Civic Platform - Subscription User	Qty	\$ 1,788.00	\$0.00
SS10AACAPOP0001	Accela Citizen Access - Subscription Population	Population	\$ 0.03	\$0.00
<b>Total Subscription Fees</b>				<b>\$0.00</b>

**Other Terms and Conditions**

- Payment obligations hereunder are non-cancelable and any sums when paid shall be non-refundable.
- Agency will be responsible for payment or reimbursement to Accela, Inc. any and all federal, state, provincial and local taxes and duties that are applicable, except those based on Accela's net income.
- If the Agency requires additional on-site assistance, a separate estimate and Statement of Work will be
- Annual Subscription fees do not include hardware or equipment. Please contact your selected hardware vendor for additional hardware or software costs.

Alternate Terms Disclaimed: The parties expressly disclaim any alternate terms and conditions accompanying drafts and/or purchase orders issued by Customer.

**Customer**

Signature: \_\_\_\_\_  
 Name: \_\_\_\_\_  
 Title: \_\_\_\_\_  
 Date: \_\_\_\_\_

**Accela, Inc.**

Signature: \_\_\_\_\_  
 Name: \_\_\_\_\_  
 Title: \_\_\_\_\_  
 Date: \_\_\_\_\_

SERVICES AGREEMENT

- 1. Parties

<p>ACCELA            Accela, Inc.            2633 Camino Ramon, Suite 500            Bishop Ranch 3            San Ramon, California 94583            Attention: Contracts Administration            T: 925.659.3200            F: 925.407.2722            e-Mail: contractsadmin@accela.com</p>	<p>CUSTOMER            _____            _____            _____            Attention: _____            T: _____            F: _____            e-Mail: _____</p>
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This Services Agreement ("SA") is intended for the exclusive benefit of the Parties; nothing herein will be construed to create any benefits, rights, or responsibilities in any other parties.

2. Term and Termination

2.1 Term Provided that Customer signs and returns this SA to Accela **no later than** \_\_\_\_\_, 201\_\_\_\_, this SA is effective as of the date of Customer's signature ("Effective Date") and will continue until completion of the services deliverables described herein.

2.2 Termination Either party may terminate if the other party materially breaches this SA and, after receiving a written notice describing the circumstances of the default, fails to correct the breach within thirty (30) calendar days. Upon any termination or expiration of this SA, all rights granted to Customer are cancelled and revert to Accela.

3. Professional Services Accela will provide the implementation, data conversion, and/or training services ("Professional Services") described in the Statement of Work ("SOW") attached hereto as Exhibit A.

3.1 Warranty Accela will commence and complete the Professional Services in a good and workmanlike manner, consistent with the practices and standards of care generally-accepted within and expected of Accela's industry.

3.2 Customer Cooperation As required, Customer agrees to provide Accela with appropriate access to Customer's facilities, personnel, data systems, and other resources. Customer acknowledges that the implementation process described in this SA is cooperative in nature and that Customer must complete its designated tasks in a timely manner in order for Accela to proceed with and complete the Professional Services. Customer delays during the implementation period may have adverse collateral effects on Accela's overall work schedule. Although Accela will use its best efforts to immediately resume work following such a delay, Customer acknowledges that schedules for the Professional Services may be delayed by more than the number of days delayed by Customer. Customer agrees that if additional time is required to complete the Professional Services because of Customer delays, such time will be charged to Customer at Accela's then-current time-and-materials rates.

3.3 Compensation

3.3.1 Implementation Fees In exchange for the Professional Services, Customer will pay to Accela the amounts indicated in Exhibit A according to the billing events schedule described therein. The pricing set forth herein reflects information generally known to Accela, supplied to Accela by Customer, and based on Accela's interpretation of the work to be performed. In addition to such amounts, Customer will reimburse Accela for airfare, travel time, lodging,

rental transportation, meals, and other miscellaneous expenses at current rates. Customer will reimburse Accela for data communications charges at the flat, per-day rate specified in Exhibit A. Upon Customer request, Accela will provide scanned or copied receipts of other appropriate documentation supporting claimed expenses and other charges.

- 3.3.2 Payment Terms Amounts are quoted in United States dollars and do not include applicable taxes, if any. Customer will be responsible for payment of all federal, state or provincial, and local taxes and duties, except those based on Accela's income. If Customer is exempt from certain taxes, Customer will provide Accela with an appropriate certificate of exemption. Customer will be invoiced for all amounts upon occurrence of the billing events described in Exhibit A. The payment terms of all invoices are net thirty (30) calendar days from the dates of the invoices. Accela may, at its sole discretion, suspend its obligations hereunder without penalty until payments for all past-due billings have been paid in full by Customer.

#### 4. Confidentiality

- 4.1 Definitions "Disclosing Party" and "Recipient" refer respectively to the party which discloses information and the party to which information is disclosed in a given exchange. Either Accela or Customer may be deemed Disclosing Party or Recipient depending on the circumstances of a particular communication or transfer of information. "Confidential Information" means all disclosed information relating in whole or in part to non-public data, proprietary data compilations, computer source codes, compiled or object codes, scripted programming statements, byte codes, or data codes, entity-relation or workflow diagrams, financial records or information, client records or information, organizational or personnel information, business plans, or works-in-progress, even where such works, when completed, would not necessarily comprise Confidential Information. The foregoing listing is not intended by the Parties to be comprehensive, and any information which Disclosing Party marks or otherwise designates as "Confidential" or "Proprietary" will be deemed and treated as Confidential Information. Information which qualifies as "Confidential Information" may be presented to Recipient in oral, written, graphic, and/or machine-readable formats. Regardless of presentation format, such information will be deemed and treated as Confidential Information. Notwithstanding, the following specific classes of information are not "Confidential Information" within the meaning of this Section:
- a) information which is in Recipient's possession prior to disclosure by Disclosing Party;
  - b) information which is available to Recipient from a third party without violation of this SA or Disclosing Party's intellectual property rights;
  - c) information disclosed pursuant to Subsection 4.4 below;
  - d) information which is in the public domain at the time of disclosure by Disclosing Party, or which enters the public domain from a source other than Recipient after disclosure by Disclosing Party;
  - e) information which is subpoenaed by governmental or judicial authority; and
  - f) information subject to disclosure pursuant to a state's public records laws.
- 4.2 Confidentiality Term The obligations described in this Section commence on the Effective Date and will continue until two (2) years following any termination or expiration of this SA ("Confidentiality Term").
- 4.3 Confidentiality Obligations During the Confidentiality Term, Recipient will protect the confidentiality of Confidential Information using the same degree of care that it uses to protect its own information of similar importance, but will in any case use no less than a reasonable degree of care to protect Confidential Information. Recipient will not directly or indirectly disclose Confidential Information or any part thereof to any third party without Disclosing Party's advance express written authorization to do so. Recipient may disclose Confidential Information only to its employees or agents under its control and direction in the normal course of its business and only on a need-to-know basis. In responding to a

request for Confidential Information, Recipient will cooperate with Disclosing Party, in a timely fashion and in a manner not inconsistent with applicable laws, to protect the Confidential Information to the fullest extent possible.

- 4.4 Publicity During the term of this SA, including the term of any amendment hereto, Accela may publicly disclose its ongoing business relationship with Customer. Such disclosures may indicate Customer's identity and the Accela product(s) and services provided or contracted to be provided to Customer. These disclosures may include press releases or other communications to media, display on Accela web sites, or use in other marketing activities, but will not include non-public information or indicate Customer's express endorsement of Accela's products or services without Customer's prior written authorization.

## 5. Other Terms and Conditions

- 5.1 Mutual Indemnification Accela agrees to indemnify, defend, and hold Customer and its officers, agents, and employees harmless against any claims, suits, or damages arising out of physical property damage or bodily injury caused by the negligence or misconduct of Accela or its employees or agents while the terms and conditions of this SA remain enforceable. Customer agrees to indemnify, defend, and hold Accela and its officers, agents, and employees harmless against any claims, suits, or damages arising out of physical property damage or bodily injury caused by the negligence or misconduct of Customer or its employees or agents while the terms and conditions of this SA remain enforceable.
- 5.2 Limitation of Liability Accela provides no warranty whatsoever for any third-party hardware or software products. Third-party applications which utilize or rely upon the Professional Services may be adversely affected by remedial or other actions performed pursuant to this SA; Accela bears no liability for and has no obligation to remedy such effects. Except as set forth herein, Accela provides all Professional Services "as is" without express or implied warranty of any kind regarding the character, function, capabilities, or appropriateness of such services or deliverables. To the extent not offset by its insurance coverage and to the maximum extent permitted by applicable laws, in no event will Accela's cumulative liability for any general, incidental, special, compensatory, or punitive damages whatsoever suffered by Customer or any other person or entity exceed the fees paid to Accela by Customer during the twelve (12) calendar months immediately preceding the circumstances which give rise to such claim(s) of liability, even if Accela or its agents have been advised of the possibility of such damages.
- 5.3 Insurance Coverage Accela will maintain insurance coverage at its sole cost and expense and will provide certificates of insurance to Customer if so requested. The insurance will not be cancelled or terminated without thirty (30) calendar days' advance written notice to Customer.
- 5.4 Force Majeure If either party is delayed in its performance of any obligation under this SA due to causes or effects beyond its control, that party will give timely notice to the other party and will act in good faith to resume performance as soon as practicable.
- 5.5 Dispute Resolution This SA is governed by the laws of the State of California. Any controversy or claim arising out of or relating to this SA, or the breach thereof, will be settled by arbitration administered by the American Arbitration Association under its Commercial Arbitration Rules, including the Emergency Interim Relief Procedures, and judgment on the award rendered by the arbitrator may be entered in any court having jurisdiction thereof. The place of arbitration will be Santa Clara County, California. Either party may apply to the arbitrator for injunctive relief until the arbitration award is rendered or the controversy is otherwise resolved. Either party also may, without waiving any remedy under this SA, seek from any court having jurisdiction any interim or provisional relief that is necessary to protect the rights or property of that party, pending the arbitrator's determination of the merits of the

controversy. Each party will initially bear its own expenses and an equal share of the costs of the arbitration, but the prevailing party may be awarded its expenses, reasonable attorneys' fees, and costs. The failure of either party to object to a breach of this SA will not prevent that party from thereafter objecting to that breach or any other breach of this SA.

- 5.6 Assignment Accela may assign its rights and obligations hereunder for purposes of financing or pursuant to corporate transactions involving the sale of all or substantially all of its stock or assets. Accela may subcontract with qualified third parties to provide portions of the Professional Services described hereinabove.
- 5.7 Survival The following provisions will survive the termination or expiration of this SA: Section 3.3 and all subsections thereof, as to Customer's obligation to pay any fees accrued or due at the time of termination or expiration; Section 4 and all subsections thereof; and Section 5 and all subsections thereof with the exceptions of Subsections 5.1, 5.3, and 5.4.
- 5.8 Alternate Terms Disclaimed The parties expressly disclaim any alternate terms and conditions accompanying drafts and/or purchase orders issued by Customer.
- 5.9 Severability and Amendment If any particular provision of this SA is determined to be invalid or unenforceable, that determination will not affect the other provisions of this SA, which will be construed in all respects as if the invalid or unenforceable provision were omitted. No extension, modification, or amendment of this SA will be effective unless it is described in writing and signed by the Parties.

**ACCELA**

**CUSTOMER**

By: \_\_\_\_\_  
(Signature)

By: \_\_\_\_\_  
(Signature)

\_\_\_\_\_  
(Print Name)

\_\_\_\_\_  
(Print Name)

Its \_\_\_\_\_  
(Title)

Its \_\_\_\_\_  
(Title)

Dated: \_\_\_\_\_  
(Month, Day, Year)

Dated: \_\_\_\_\_  
(Month, Day, Year)

**Exhibit Follows.**

**END OF DOCUMENT**

**EXHIBIT A**

Statement of Work (SOW) document follows this page.

**END OF DOCUMENT**

# ACCELA SUBSCRIPTION TERMS AND CONDITIONS

Version 102114a

1. As used herein, "Accela" refers to Accela, Inc. and "Customer" refers to the subscribing customer designated on the attached Order. Accela and Customer are collectively designated as the "Parties".

2. These Subscription Terms and Conditions ("Terms") are effective upon execution of the Order by Customer and are for the exclusive benefit of the Parties. Nothing herein will be construed to create any benefits, rights, or responsibilities in any other parties.

3. Customer's subscription term commences on the date Accela provides appropriate access credentials to Customer's designated technical contact, indicating that the application services identified in the Order ("Subscribed Services") are available for Customer's subscription use. Said date is Customer's "Service Date" for purposes of designating the start of any subscription term.

4. Subscription terms are twelve (12) calendar months in duration. At the end of Customer's subscription term or, if a multi-term subscription is indicated on the Order, the last of Customer's subscription terms, Customer's subscription will renew for an additional term. The per-unit pricing during said additional term will be the same as the prior term's annual fees unless Accela notifies Customer otherwise not less than sixty (60) calendar days prior to the end of said prior term. Any price increase will be effective at the start of the renewal term. No such price increase will exceed seven percent (7%) of the prior term's annual pricing. Customer may opt-out from said automatic renewal by providing written notice to Accela not less than sixty (60) calendar days prior to the Service Date anniversary which begins the renewal term. During said sixty-day period, Customer may decrease the number of users for which it has subscribed; said decrease will be effective during the next subscription term. Customer may not decrease its number of subscribed users at any other time during a subscription term. At any time during a subscription term, Customer may increase its number of subscribed users by submitting an order to Accela and paying the fees associated with the increase. Such fees will be calculated as the pro-rata remaining portion of the

subscription term, rounded-up to the nearest full month.

5. In exchange for its use of the Subscribed Services, Customer will pay to Accela the amounts indicated in the Order. Said amounts are based on services purchased and not actual usage; payment obligations are non-cancelable and fees paid are non-refundable, except as otherwise specifically-provided herein. Unless otherwise stated, such fees do not include any taxes, levies, duties or similar governmental assessments of any nature, including but not limited to value-added, sales, use or withholding taxes, assessable by any local, state, provincial, federal or foreign jurisdiction ("Taxes"). Customer is responsible for paying all Taxes associated with its purchases hereunder. If Accela has the legal obligation to pay or collect Taxes for which Customer is responsible, the appropriate amount will be invoiced to and paid by Customer, unless Accela is provided with a valid tax exemption certificate authorized by the appropriate taxing authority. Accela is solely responsible for taxes assessable against it based on its income, property and employees.

6. The Subscribed Services are protected under the laws of the United States and the individual states and by international treaty provisions. Accela retains full ownership in the Subscribed Services and grants to Customer a limited, nonexclusive, nontransferable right to use the Subscribed Services, subject to the following terms and conditions: a) The Subscribed Services are provided for use only by Customer employees and to the extent of their duties for Customer, Customer's agents, contractors and officials; b) Customer may not make any form of derivative work from the Subscribed Services, although Customer is permitted to develop additional or alternative functionality for the Software using tools and/or techniques provided to Customer by Accela; c) Customer may not obscure, alter, or remove any confidentiality or proprietary rights notices; d) Customer may use the Subscribed Services only to process transactions relating to properties within both its own geographical and political boundaries and may not sell, rent, assign, lend, or share any of its rights

hereunder; e) Customer is responsible for all activities conducted using its user credentials and for its users' compliance with the provisions of these Terms; and f) All rights not expressly granted to Customer are retained by Accela. Accela will make the Subscribed Services available to Customer pursuant to these Terms during a subscription term. Customer agrees that its purchases hereunder are neither contingent on the delivery of any future functionality or features nor dependent on any oral or written public comments made by Accela regarding future functionality or features.

7. Accela warrants that it has full power and authority to agree to these Terms and that, as of the effective date hereof, the Subscribed Services do not infringe on any existing intellectual property rights of any third party. If a third party claims that the Subscribed Services do infringe, Accela may, at its sole option, secure for Customer the right to continue using the Subscribed Services or modify the Subscribed Services so that these do not infringe. Accela will have the sole right to conduct the defense and will defend any legal action and conduct all negotiations for its settlement or compromise.

8. Accela has no obligation for any claim based upon a modified version of the Subscribed Services, where such modifications were not made or authorized by Accela, or the combination or operation of the Subscribed Services with any product, data, or apparatus not provided by Accela. Accela provides no warranty whatsoever for any third-party hardware or software products. **Except as expressly set forth herein, Accela disclaims any and all express and implied warranties, including but not limited to warranties of merchantability and fitness for a particular purpose.**

9. The Subscribed Services will be hosted by Accela on Accela-owned equipment at a physically-secure commercial third-party hosting facility. Accela will perform system administration duties as required to maintain the service levels described below and to facilitate timely restoration of Customer's data and operations, if necessary, following unanticipated interruptions of the Subscribed Services. Accela will implement suitable network security measures to minimize the likelihood of unanticipated interruptions of the Subscribed Services.

10. Accela will endeavor to provide Customer with no less than twenty-four (24) hours' notice prior to Subscribed Services unavailability due to planned maintenance (other than during Accela's standard maintenance window between the hours of 9:00 PM [21:00] Thursday and 1:00 AM [1:00] Friday Pacific time); Accela will endeavor to provide as much notice as is practicable under the circumstances for updates and fixes which may be applied on a more urgent basis. Accela will provide five (5) business days' notice prior to any planned network, server hardware, operating environment, or database modifications of a material nature.

11. Excluding the foregoing events, Accela warrants that the Subscribed Services will be available no less than ninety-nine point nine percent (99.9%) of each calendar month. For each month during which the availability of the Subscribed Services does not achieve the established standard, Accela will provide a credit to Customer's account as calculated pursuant to Section 12 below, provided that the substandard availability is timely identified by Customer in writing and can be objectively verified. Credits accumulated pursuant to this Section may be applied to additional Accela products and/or services, but will not be refunded to Customer.

12. The performance requirements for the Subscribed Services, excluding planned maintenance downtime, are below. Uptime is calculated on a calendar month basis as  $U=O/(M-P)*100$ , where U is Uptime, O is the amount of operational uptime for the Subscribed Services during a given month, M is the number of minutes in the month, and P is the number of minutes of planned downtime during the month. Credits are calculated on pro-rated monthly fees.

<i>Uptime</i>	<i>Credit</i>
≥99.9%	None
<99.9% but ≥99.0%	15%
<99.0% but ≥95.0%	35%
<95.0%	100%

13. In support of the Subscribed Services, Accela will provide Customer with a) a telephone number to contact the Customer Resource Center (CRC), Accela's live technical support facility, which is available from 4:00 a.m. until 6:00 p.m. Pacific time Monday through Friday, excluding Accela's observed holidays; b) one or more electronic mail addresses to



which Customer may submit routine or non-critical support requests, which Accela will address during its regular business hours; and c) access to archived software updates and other technical information in Accela's online support databases, which are continuously available. Where support is needed to address non-functioning or seriously impaired Services and there is no reasonable workaround available, Accela will promptly respond to the support request and use commercially reasonable efforts to provide updates toward resolution of the issue.

14. The following are not covered by these Terms, but may be separately available at rates and on terms which may vary from those described herein: a) Services required due to misuse of the Subscribed Services; b) Services required by Customer to be performed by Accela outside of Accela's usual working hours; c) Services required due to external factors including, but not necessarily limited to, Customer's use of software or hardware not authorized by Accela; or d) Services required to resolve or work-around conditions which cannot be reproduced in Accela's support environment.

15. Customer warrants that it owns or has been authorized to provide the data to Accela. Customer retains full ownership of said data and grants to Accela a limited, nonexclusive, nontransferable license to use said data only to perform Accela's obligations in accordance with these Terms.

16. Throughout the term of the agreement, upon the request of Customer, Accela will provide Customer with:

- (i) a copy of its data in a database dump file not more than once per calendar quarter, ;
- (ii) an APO property conversion upload, not more than twice per annual term, and
- (iii) a Crystal Report placement not more than ten (10) times per annual term.

Within thirty (30) calendar days following the end of its final Subscribed Services term ("End of Term"), Customer may request that Accela provide a complete copy of Customer's data and associated documents, as updated or modified by Customer's use of the Subscribed Services, in a database dump file format. Accela will comply in a timely manner with such request, provided that Customer a) pays all costs of and associated with such copying, as calculated at

Accela's then-current time-and-materials rates; and b) pays any and all unpaid amounts due to Accela.

17. Subject to the limitations of Section 6, Customer may authorize access to the Subscribed Services by creating unique user names and passwords ("Logins") up to the number of users indicated in the Order.

18. Each Login must be assigned to a single individual and may not be shared or used by more than one such user. Customer may reassign any Login to another individual, provided that such reassignments do not circumvent the "single individual" requirement described in this Section.

19. Customer acknowledges that transmissions and processing of Customer's electronic communications are fundamental to Customer's use of the Subscribed Services. Customer further acknowledges that portions of such transmissions and processing may occur within various computer networks not owned or operated by Accela. Customer agrees that Accela is not responsible for any delays, losses, alterations, interceptions, or storage of its electronic communications which occur in computer networks not owned or operated by Accela.

20. Either party may end Customer's access to the Subscribed Services if the other materially breaches these Terms and, after receiving a written notice describing the circumstances of the default, fails to correct the breach within thirty (30) calendar days. Upon any termination for cause by Customer, Accela will refund any prepaid subscription fees covering the remainder of the subscription term after the effective date of termination.

21. "Disclosing Party" and "Recipient" refer respectively to the party which discloses information and the party to which information is disclosed in a given exchange. Either Accela or Customer may be deemed Disclosing Party or Recipient depending on the circumstances of a particular communication or transfer of information. "Confidential Information" means all disclosed information relating in whole or in part to non-public data, proprietary data compilations, computer source codes, compiled or object codes, scripted programming statements, byte codes, or data codes, entity-relation or workflow diagrams, financial records or information, client records or information, organizational or personnel information, business

plans, or works-in-progress, even where such works, when completed, would not necessarily comprise Confidential Information. The foregoing listing is not intended by the Parties to be comprehensive, and any information which Disclosing Party marks or otherwise designates as "Confidential" or "Proprietary" will be deemed and treated as Confidential Information. Information which qualifies as "Confidential Information" may be presented to Recipient in oral, written, graphic, and/or machine-readable formats. Regardless of presentation format, such information will be deemed and treated as Confidential Information. Notwithstanding, the following specific classes of information are not "Confidential Information" within the meaning of this Section: a) information which is in Recipient's possession prior to disclosure by Disclosing Party; b) information which is available to Recipient from a third party without violation of this Section or Disclosing Party's intellectual property rights; c) information which is in the public domain at the time of disclosure by Disclosing Party, or which enters the public domain from a source other than Recipient after disclosure by Disclosing Party; d) information which is subpoenaed by governmental or judicial authority; and e) information subject to disclosure pursuant to a state's public records laws. Recipient will protect the confidentiality of Confidential Information using the same degree of care that it uses to protect its own information of similar importance, but will in any case use no less than a reasonable degree of care to protect Confidential Information. Recipient will not directly or indirectly disclose Confidential Information or any part thereof to any third party without Disclosing Party's advance express written authorization to do so. Recipient may disclose Confidential Information only to its employees or agents under its control and direction in the normal course of its business and only on a need-to-know basis. In responding to a request for Confidential Information, Recipient will cooperate with Disclosing Party, in a timely fashion and in a manner not inconsistent with applicable laws, to protect the Confidential information to the fullest extent possible.

**22. ACCELA WILL, AT ALL TIMES DURING THE AGREEMENT, MAINTAIN APPROPRIATE INSURANCE COVERAGE. TO THE EXTENT NOT OFFSET BY ITS INSURANCE COVERAGE AND TO THE MAXIMUM EXTENT PERMITTED BY APPLICABLE LAWS, IN NO EVENT WILL ACCELA'S CUMULATIVE LIABILITY FOR ANY GENERAL, INCIDENTAL, SPECIAL,**

**COMPENSATORY, OR PUNITIVE DAMAGES WHATSOEVER SUFFERED BY CUSTOMER OR ANY OTHER PERSON OR ENTITY EXCEED THE FEES PAID TO ACCELA BY CUSTOMER DURING THE TWELVE (12) CALENDAR MONTHS IMMEDIATELY PRECEDING THE CIRCUMSTANCES WHICH GIVE RISE TO SUCH CLAIM(S) OF LIABILITY, EVEN IF ACCELA OR ITS AGENTS HAVE BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES.**

23. If Accela is delayed in its performance of any obligation hereunder due to causes or effects beyond its control, Accela will give timely notice to Customer of such circumstances and will act in good faith to resume performance as soon as practicable.

24. Accela may assign its rights and obligations hereunder for purposes of financing or pursuant to corporate transactions involving the sale of all or substantially all of its stock or assets.

25. The Parties expressly disclaim any alternate terms and conditions accompanying drafts and/or purchase orders issued by Customer.

26. Section 5 will survive the End of Term for so long as is required to complete collection of unpaid amounts. The limitations and waivers described in Sections 8, 19, 22, and 27 will survive the End of Term. Section 12 will survive the End of Term for a period of thirty (30) calendar days. Section 16 will survive the End of Term for a period of thirty (30) calendar days or for so long as is required for Accela to complete its response to a Customer request made during said thirty-days period. Section 21 will survive the End of Term for a period of two (2) years. With the exceptions of the foregoing surviving sections, the remainder of these Terms will terminate at the End of Term.

27. If any particular provision of these Terms is determined to be invalid or unenforceable, that determination will not affect the other provisions, which will be construed in all respects as if the invalid or unenforceable provision were omitted. No extension, modification, or amendment of these Terms will be effective unless it is described in writing and signed by the Parties.

CITY OF LANCASTER  
TERMS AND CONDITIONS

- 1.**ACCEPTANCE:** As defined in the Services Agreement.
- 2.**PRICE AND DELIVERY.** As defined in the Subscription and Services Agreements.
- 3.**PAYMENT.** Buyer shall pay to Vendor the amount of the invoice within forty five (45) days of the invoice date, or sooner if otherwise specified on the attached purchase order.
- 4.**PACKING AND SHIPPING.** Not applicable.
- 5.**F.O.B, TITLE AND RISK OF LOSS.** Not applicable.
- 6.**INVOICING.** After shipping or otherwise providing merchandise under this order, Vendor shall send a separate invoice, including item numbers, Purchase Order Number and Requestor Name, . The time for payment of Vendor's invoices shall commence upon the date of invoice.
- 7.**ADVANCE SHIPMENTS AND COMMITMENTS.** Not applicable.
- 8.**CHANGES.** Buyer may, by written change order, suspend performance in whole or in part, make changes in quantities, in drawings, designs or specifications, or require additional or diminished work. If any such change causes an increase or decrease in the cost of or the time required for performance of this order, an equitable adjustment shall be made in the contract price or delivery dates, or both, and this order shall be modified in writing accordingly. Any change order or claim for adjustment under this Section 8 must be by written instrument and signed by both parties.
- 9.**INSPECTION.** Not applicable.
- 10.**WARRANTIES.** As defined in the Subscription and Services Agreements.
- 11.**PROPRIETARY INFORMATION.** All written information obtained by Vendor from Buyer concerning this order, and which is identified as proprietary by Buyer, shall be received in confidence and shall remain the property of the Buyer, and shall be used and disclosed by Vendor only to the extent necessary for performance of this order.
- 12.**COMPLIANCE WITH LAWS.** Vendor shall comply with all federal, state and local laws, ordinances, rules and regulations in the manufacture and sale of the merchandise (including the performance of any services or construction work). Vendor will defend and hold Buyer harmless from any loss, damage or costs attributable or arising out of any actual or alleged violation of any such law, ordinance, rule or regulation.
- 13.**USE OF VENDOR'S LITERATURE.** Buyer shall have the right, at no additional charge, to use and reproduce the Vendor's applicable literature, such as operating and maintenance manuals, technical publications, prints, drawings, training manuals, and other similar supporting documentation and sales literature. Vendor shall advise Buyer in writing of any updated information relating to the foregoing literature and documentation.
- 14.**LIABILITY FOR INJURY.** Vendor shall indemnify Buyer against any loss and liability for all personal injury and property damage caused by the services.
- 15.**ASSIGNMENT PROHIBITED.** Vendor shall not assign this order, or any rights or obligations hereunder, without the prior written notice of Buyer, and no attempted or purported assignment by Vendor shall be binding on Buyer without such written consent. A change of control of Vendor or a transfer by Vendor for purposes of financing shall not constitute a transfer hereunder.
- 16.**DEFAULT AND TERMINATION.** Buyer may, by written notice of default to the Vendor, terminate this order, or any part thereof, under the following circumstances:
  - A.If Vendor fails to deliver the merchandise (or to commence performance of any services or construction work included therein) in accordance with the delivery schedule specified herein, or any extension thereof; or if vendor fails to perform any other provision of this order, or so fails to make progress as to endanger performance of this order in

accordance with its terms, and any such failure or default is not cured within thirty (30) days after written notice from the Buyer, or

B. In the event of the appointment of a trustee, receiver or liquidator for all or a portion of Vendor's property, or the institution of bankruptcy, reorganization, arrangement or liquidation proceedings by or against the Vendor, or any assignments by Vendor for the benefit of creditors.

17. **WAIVER.** Buyer's failure to insist upon the performance of any provision of this order, or to exercise any right or privilege granted to Buyer under this order, shall not be construed as a waiver of any provision of this order, and the same shall continue in full force and effect. If any provision of this order is determined by a court of competent jurisdiction to be void or otherwise unenforceable, the other provisions of this order shall not be affected thereby.

18. **DISPUTE RESOLUTION.** Disputes regarding the interpretation or application of any provisions of this order shall, to the extent reasonably feasible, be resolved through good faith negotiations between the parties. If any action at law or in equity is brought to enforce or interpret any provisions of this order, the prevailing party in such action shall be entitled to reasonable attorney's fees, costs and necessary disbursements, in addition to such other relief as may be sought and awarded.

19. **GOVERNING LAW.** The validity, performance and construction of the order, including all terms and conditions thereof, shall be construed in accordance with and governed by the laws of the State of California.

20. **ENTIRE AGREEMENT.** This order, its terms and conditions, and any supplemental attachments, addenda or riders annexed hereby by Buyer, contain the entire agreement between the parties as to the subject matter hereof, and replace and supersede any prior or contemporaneous communications, representations or agreements, whether written or oral, with respect to such subject matter, unless specifically provided otherwise herein.

21. **NOTICES.** All notices, demands, requests or approvals to be given in connection with this order shall be in writing and delivered in person or by mail, postage prepaid, and addressed to the other party at the address set forth on the face of this order, or to such other address as may be subsequently designated in writing by either party.

## 22. **SPECIAL PROVISIONS**

A. Any special provisions to this Purchase Order are attached. If you have any questions, please contact Purchasing for clarification.

This transaction shall be governed by the laws of the State of California.

All applicable licenses, State County or City must be current.

Revised 07/01/05

## Statement of Work



Prepared for:  
City of Lancaster, California

Version: 1.7  
11/17/14

# TABLE OF CONTENTS

TABLE OF CONTENTS .....	2
DOCUMENT CONTROL .....	4
OVERVIEW.....	5
<b>SERVICES DESCRIPTION .....</b>	<b>5</b>
PURPOSE .....	5
PROJECT TIMELINE .....	5
PROJECT MANAGEMENT .....	5
CRITICAL SUCCESS FACTORS .....	6
PROJECT ASSUMPTIONS .....	6
<b>WORK DESCRIPTION .....</b>	<b>7</b>
DELIVERABLE 1: PROJECT INITIATION .....	7
DELIVERABLE 2: ACCELA AUTOMATION SETUP.....	8
DELIVERABLE 3: ACA GO LIVE FOR WATER HEATER PERMIT (LAND) .....	9
DELIVERABLE 4: CUSTOM PAYMENT ADAPTER FOR USE WITH AUTOMATION AND CITIZEN ACCESS (ALL).....	10
DELIVERABLE 5: MOBILE HOME PERMIT .....	10
DELIVERABLE 6: BEST PRACTICE TEMPLATE OVERVIEW TRAINING, ANALYSIS AND SETUP (LAND).....	11
DELIVERABLE 7: BEST PRACTICE TEMPLATE OVERVIEW TRAINING, ANALYSIS AND SETUP (LICENSING).....	13
DELIVERABLE 8: BEST PRACTICE TEMPLATE OVERVIEW TRAINING, ANALYSIS AND SETUP (ASSETS).....	15
DELIVERABLE 9: STANDARD ADDRESS, PARCEL AND OWNERSHIP (APO) CONVERSION (LAND) .....	17
DELIVERABLE 10: HISTORICAL DATA CONVERSION ANALYSIS AND DEVELOPMENT (LAND) .....	18
DELIVERABLE 11: HISTORICAL DATA CONVERSION ANALYSIS AND DEVELOPMENT (LICENSING) .....	18
DELIVERABLE 12: HISTORICAL DATA CONVERSION ANALYSIS AND DEVELOPMENT (ASSETS) .....	19
DELIVERABLE 13: ACCELA CITIZEN ACCESS CONFIGURATION (ALL) .....	21
DELIVERABLE 14: SPECIFICATIONS DOCUMENT FOR GAS INTEGRATION WITH PHOENIX 8000.....	21
DELIVERABLE 15: DEVELOP GAS INTEGRATION INTERFACE.....	22
DELIVERABLE 16: CSLB INTERFACE .....	22
DELIVERABLE 17: INTERFACE TO FINANCIAL SYSTEM (BI-DIRECTIONAL).....	23
DELIVERABLE 18: REPORT SPECIFICATIONS (ALL).....	24
DELIVERABLE 19: REPORT DEVELOPMENT (ALL).....	25
DELIVERABLE 20: ACCELA GIS CONFIGURATION (ALL).....	25
DELIVERABLE 21: ACCELA APPS CONFIGURATION (ALL).....	26
DELIVERABLE 22: ADMINISTRATIVE AND TECHNICAL TRAINING (ALL) .....	26
DELIVERABLE 23: END USER TRAINING (LAND).....	27
DELIVERABLE 24: END USER TRAINING (LICENSING) .....	28
DELIVERABLE 25: END USER TRAINING (ASSETS) .....	28
DELIVERABLE 26: USER ACCEPTANCE TESTING (UAT) (LAND) .....	29
DELIVERABLE 27: USER ACCEPTANCE TESTING (UAT) (LICENSING) .....	30
DELIVERABLE 28: USER ACCEPTANCE TESTING (UAT) (ASSET) .....	31
DELIVERABLE 29: POST DEPLOYMENT SUPPORT AND TRANSITION TO CRC (LAND, LICENSING, AND ASSETS) .....	31
DELIVERABLE 30: PROJECT MANAGEMENT – 18 MONTHS.....	32
<b>PAYMENT TERMS.....</b>	<b>33</b>
PAYMENT SCHEDULE.....	33



---

<b>EXPENSES:</b> .....	<b>34</b>
<b>CONTRACT SUM:</b> .....	<b>35</b>
<b>APPENDIX A – DATA CONVERSION ASSUMPTIONS</b> .....	<b>37</b>
GENERAL INFORMATION AND REQUIREMENTS FOR HISTORICAL CONVERSIONS .....	37
DATA CONVERSION ASSUMPTIONS .....	37
STANDARD DOCUMENT MIGRATION .....	37
<b>APPENDIX B – ACCELA BPT TEMPLATES RECORD LIST V5</b> .....	<b>37</b>
<b>APPENDIX C – STANDARD ACCELA ADAPTERS</b> .....	<b>40</b>
<b>APPENDIX D – DELIVERABLE TIME LINE</b> .....	<b>41</b>



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## OVERVIEW

Congratulations on your selection of Accela, Inc., and their enterprise suite of industry leading software. This proposed implementation by Accela of the Accela products is designed specifically to meet the requirements and budget defined by Agency of Lancaster (Agency"). Accela is proposing to utilize the Accela Best Practice Template Configuration implementation Methodology, to promote a successful project that will meet the Agency's objectives. The following Statement of Work will detail how Accela will implement the software, including the major milestones and deliverables that will ensure your success.

Accela is committed to providing a superior solution and deployment of the Accela software, for the current and future needs of the Agency of Lancaster. Accela will work with Agency staff to optimize Accela's portfolio of software, best practices, and customer experience to enable the Agency to successfully deploy the Accela Automation software in the Civic Cloud and meet its functionality, timing and cost requirements. This Statement of Work ("SOW") sets forth a scope and definition of the consulting/professional services, work and/or project (collectively, the "Services") to be provided by Accela to the Agency of Lancaster.

## SERVICES DESCRIPTION

### PURPOSE

The purpose of this document is to detail the specific activities, deliverables, roles and responsibilities, and acceptance criteria that comprise the implementation of Accela Automation and Accela Citizen Access for the Agency. Accela will provide professional services for implementation of the scope and products detailed in the Work Description section detailed henceforth.

### PROJECT TIMELINE

The term of this project is estimated at 18 months and 1 phase for the 4 project components itemized below. The 4 projects will be delivered collectively during the 18 month time line. The projects components will be addressed in the following order as requested by the Agency. Appendix D is representative of the target time line. Any changes to the implementation time line that do not allow for simultaneous project implementation will incur additional scope, specifically relative to Project Management time and Change Order practices should ensue. (To complete each phase before starting the next could cause this to be a 24 to 36 month project).

1. ACA Permit for a Water Heater
2. Land Management Implementation for the Upgrade of Permits Plus
3. Licensing Implementation
4. Asset Implementation

Upon execution of this SOW, the parties will collaborate to determine a start date for Services to be rendered. Upon initiation of these Services, the assigned resources will work with the Agency to collaboratively define a high level, baseline project schedule. Accela will use the baseline project schedule to plan and schedule resource availability in order to complete the defined scope.

Given the fact that project schedules are working documents that change over the course of the project, Accela will work closely with Agency to update, monitor, agree, and communicate any modifications. Changes to the baseline project schedule may result in a change in resource availability and project management costs.

### PROJECT MANAGEMENT

A Project Manager will be assigned to this project, but not solely dedicated or full time. If the agency requests that a Full Time Project Manager is allocated to the project additional costs would need to be associated and Change Order practices should ensue (Full Time Project Management is estimated at 1,456 hours per year). It is expected that the Accela Project Manager will work with an Agency designated Project Manager that will be assigned and allocated for the duration of the project.



To support the implementation of the Accela Automation software at the Agency, Accela will provide Project Management services throughout the project. Generally these services include the following:

- Project plan management using Microsoft Project 2010
- Project document management using Microsoft SharePoint
- Issue log management and escalation
- Status reporting
- Change order management
- Resource management
- Executive project oversight and quality assurance

By mutual agreement, some project management tasks may be shared between the Accela Project Manager and the Agency Project Manager.

### **CRITICAL SUCCESS FACTORS**

In order to successfully execute the services described herein, there are several critical success factors for the project that must be closely monitored and managed by the stakeholders. These factors are critical in setting expectations between the Agency and Accela, identifying and monitoring project risks, and promoting strong project communication.

- **Knowledge Transfer** – While we cannot guarantee specific expertise for Agency staff as a result of participating in the project, Accela will make all reasonable efforts to transfer knowledge to the Agency. It is critical that Agency personnel work with Accela in order to schedule all work in the best manner to facilitate knowledge transfer and resource availability.
- **Dedicated Agency Participation** – We fully understands that Agency staff members have daily responsibilities that will compete with the amount of time that can be dedicated to the implementation project. However, it is critical that the Agency acknowledges that its staff must be actively involved throughout the entire duration of Services as defined in the Project Plan. Accela will communicate insufficient participation of Agency and Accela resources to the project sponsor with real and potential impacts to the project timeline.
- **Delivery of Needed Information and Documentation**- In order to guarantee success and meet the timelines and costs described it will be essential that the Agency provide required documentation and information as requested by the delivery staff in timely manner. The expected information required is described in detail in each of the delivery sections. Failure to provide the required information can result in an extension of the project timeline and/or an increase in the scope/cost of the proposed solution.
- **Implementation Methodology** – We offer a successful, proven, implementation methodology which is crucial to the project success. Accela's Automation software and customer base is a niche market and as such our implementation methodology may differ from other consulting firms and software packages. It is imperative to project success that the Agency is willing to adhere/adopt to the Methodology and tasks described in this Statement of Work.

### **PROJECT ASSUMPTIONS**

- Agency and Accela will review their responsibilities before work begins to ensure that Services can be satisfactorily completed.
- Changes or additions to scope, requested by the Agency will require a Change Order to reimburse Accela for the additional costs associated with the change.
- Agency will provide work space for the Delivery Team for work completed on Agency premises if onsite work is needed. We anticipate no more than 1 staff member onsite at any given time.



- Accela will implement the version of Accela Automation that is deployed on the Accela hosted environment.
- Agency will maintain primary responsibility for the scheduling of Agency employees and facilities in support of project activities.
- Agency is responsible for proper desktop hardware/software/network preparation in accordance with Accela specifications.
- Agency has committed to the involvement of key resources and subject matter experts for ongoing participation in all project activities as defined in this SOW.
- It is assumed that all Asset BPT's will be linked to GIS feature classes. The Agency will be responsible for all GIS data preparation and cleansing. The Accela GIS configuration will be limited to the initial GIS linking and syncing.
- Report Specification and Development is limited to a number of hours as defined in Deliverable 18 and 19. The City will leverage the Standard Reports provided by Accela as part of the BPT's. 70 Ad Hoc reports have been identified for use within the project. Accela will also deliver the SMIP and Green Fee report developed and used for other agencies. Accela is providing 80 hours of report development assistance that can be used to modify 85 BPT / Ad Hoc reports delivered as off the shelf or to build custom reports and forms.
- 80 hours of scripting assumed across all of the BPT's
- 4 Compositions implemented as part of the Standard BPT's for the Land Module.
- Accela's MS Access to SQL server migration tool assumed to be used to support migration.
- We will create a real-time integration to the financial system. This can only be accomplished if the financial system can be reached across a VPN tunnel to the Cloud environment and the financial system supports real time integrations.
- Assets and Licensing will leverage the BPT's "As-Is". We will add additional drop down values for NAICS codes as displayed from the Torrance configuration. Fleet, Wastewater, Storm water, Trees, Streets and Traffic will be implemented using the BPT's
- There is no Accela Citizen Access setup for Assets.
- Accela will configure and demonstrate materials to the agency. Accela WILL NOT configure parts functionality for use within Automation. Accela will provide a template spreadsheet that the agency can populate materials, such as, cost items/cost groups for loading into Accela Automation.

## WORK DESCRIPTION

The following section describes the specific activities and tasks that will be executed to meet the business objectives and business requirements of the Agency. In support of the implementation effort as described above, Accela will provide the following detailed implementation services. For each deliverable, a description is provided as well as criteria for acceptance of the deliverable.

### DELIVERABLE 1: PROJECT INITIATION

Project initiation is an opportunity to ensure the project starts in a well-organized, structured fashion while re-confirming the Agency and Accela expectations regarding the implementation. This Deliverable is comprised of project planning activities, core project management documents and templates and the first on-site meeting conducted between the Agency and Accela after the signing of the Statement of Work.

In conjunction with the Agency representatives, Accela will perform the following tasks:

- Conduct a formal onsite Kickoff meeting. The objective of this meeting is to review the purpose of the project and discuss the project scope, roles and responsibilities, deliverables, and timeline.
- Finalize Communication Plan and project logistics including escalation, status reporting, issue/risk management, work locations, etc.
- Finalize and document formal deliverable signoff procedures, identify team members that will be responsible for signoff from the Agency and Accela.
- Review infrastructure requirements and preparation (with designated Agency technical staff).
- Finalize an integrated project plan that includes resource allocation for all tasks (in cooperation with the Agency Project Manager).

The Project Kickoff Meeting includes a formal presentation by the project team to review project objectives, methodology, timeline, roles and responsibilities, risks, and other key project elements with project stakeholders.



In terms of specific output, the following will be executed for this deliverable:

- Finalized Project (MS Word).
- Updated Baseline Project Plan from SOW Workshop (MS Project).
- Project SharePoint Site.
- Project Kickoff Meeting.

Accela Responsibilities:

- Provide timely and appropriate responses to Agency's request for information.
- Coordinate project planning activities.
- Communicate the Accela BPT Implementation Methodology that will be used by Accela to deliver Services.
- Complete Baseline Project Plan and Project Kickoff Presentation deliverables with input from appropriate Agency resources.

Agency Responsibilities:

- Identify and set expectations with key resources and subject matter experts for ongoing participation in the project.
- Provide timely and appropriate responses to Accela's requests for project planning input and meeting logistics requests.
- Provide meeting facilities for Project Kickoff and other onsite activities.
- Include Project Sponsor in Project Kickoff Meeting.

Acceptance Criteria:

- Review and acceptance of the Baseline Project Plan
- Completion of the Project Kickoff Meeting
- Demonstrate SharePoint site

## **DELIVERABLE 2: ACCELA AUTOMATION SETUP**

Upon Contract signing, Accela will work with Accela to setup a system in the Accela Hosted environment and load the Best Practice Templates for Land, Licensing, and Asset management, which includes permits and inspections, code enforcement, planning, zoning, licensing, and asset management into the configuration. Additionally, these environments will be licensed according to the Agency sales order form and will be subject to Accela's Subscription Terms and Conditions.

In terms of specific output, the following will be executed for this deliverable:

- URL's and login information for each environment
- Demonstrate that the Accela Automation applications are operational in the Agency computing environment.
- Set up the software licensing in the Accela cloud per the agreed to sales order form
- Install the Land Management, Licensing, and Asset Best Practices Template Configurations

Accela Responsibilities:

- Provide timely and appropriate responses to Agency's request for information.
- Setup the Accela Automation software in Accela's Civic Cloud.
- Provide desktop requirements documentation to Agency.
- Demonstrate the Civic Cloud can be logged into using the Admin account.

Agency Responsibilities:



- Provide timely and appropriate responses to requests for information.
- Arrange for the availability of appropriate people for the system installation, setup, testing, and quality assurance throughout the setup process.

Acceptance Criteria:

- Confirmation of ability to log into the Accela Automation software with the Admin Account.

**DELIVERABLE 3: ACA GO LIVE FOR WATER HEATER PERMIT (LAND)**

Accela will deliver a Water Heater Permit in Automation and Citizen Access that is not configured within the Best Practice Templates. The purpose of the Water Heater permit is to provide an immediate online presence for the Agency. Accela will document the fields and fees required to implement the Water Heater Permit. The documentation review will include, but not necessarily be limited to, the following:

- Most Current Fees
- Fields that must be used to capture the data online.
  - Address Fields
  - Parcel Fields
  - Owner Fields
  - Contractor Fields
  - Description of Work
  - No more than 15 user defined fields to capture Water Heater Specific Information.

Accela Responsibilities:

- Provide timely and appropriate responses to Agency's request for information.
- Conduct meetings via email, web conference, phone, and in person to complete required consulting.
- Configure the Record type in Automation and Citizen Access.

Agency Responsibilities:

- Provide timely and appropriate responses to Accela's requests for information.
- Make available the appropriate Agency key users and content experts to provide required information, and participated as needed.
- Provide information about the Agency Users for the system including the Agency organizational structure.
- Schedule participants and meeting locations for activities.

Acceptance Criteria:

- Demonstration of the Water Heater Permit in Support Automation and Support Citizen Access. The agency will have three (3) business days total to review configuration before it is deployed to the Production site.

#### **DELIVERABLE 4: CUSTOM PAYMENT ADAPTER FOR USE WITH AUTOMATION AND CITIZEN ACCESS (ALL)**

The client has requested that a custom payment adapter be developed for the use of taking payments within Accela Citizen Access or Accela Automation that are processed by an agency chosen payment processor (e.g. Bank of America) . Credit card payments in ACA may utilize a "redirect style" of payment adapter where the ACA user is redirected to a payment processor hosted page for the entry and processing of payment information. This type of adapter is only available for use in ACA. Payments in Accela Automation cannot utilize this style of adapter but must instead utilize an "ePayments3" style adapter which is developed to leverage a vendor provided payment API. This deliverable consists of one payment adapter, either a "redirect style" adapter for use with ACA only or a "ePayments3" style of adapter for use with Accela Automation and ACA. If upon completion of analysis and documentation of the interface Accela can only complete the development of the adapter as a redirect then the agency might have to consider a standard Accela Adapter as defined in Appendix C below. The following is a list of Deliverables:

- Specification Document for the Custom Adapter
- Development of the Customer Adapter per the specification

##### Accela Responsibilities:

- Provide timely and appropriate responses to Agency's request for information.
- Conduct meetings via email, web conference, phone, and in person to complete required consulting.
- Develop a custom adapter based upon feedback provided by the agency and desired adapter to merchant account.

##### Agency Responsibilities:

- Provide timely and appropriate responses to Accela's requests for information.
- Make available the appropriate Agency key users and content experts to provide required information, and participated as needed.
- Setup meetings with Merchant Vendor OR Adapter Vendor so that the specification document can be written.
- Work with Merchant Vendor or Adapter Vendor to test the credit card processing in a support and production environment.
- Schedule participants and meeting locations for activities.
- Provide agency server to host adapter
- Work with Accela staff to deploy and configure VPN tunnel between Accela servers and the server hosting the adapter.
- Agency most chose a payment processor where Accela can leverage a developmental API or developmental Redirect

##### Acceptance Criteria:

- Demonstration of the custom adaptor taking a payment in Support Citizen Access. The agency will have three (3) business days total to review configuration before it is deployed to the Production site.

#### **DELIVERABLE 5: MOBILE HOME PERMIT**

Accela will deliver a Mobile Home Permit that is not configured within the Best Practice Templates. The Mobile Home Permit will be exported from a previous Configuration and imported into the Agency configuration. Upon completion of the import Accela will document requirements of the Permit that are considered to be a GAP in the exported Permit. The documentation review will include, but not necessarily be limited to, the following:

- Most Current Fees (Fees were reviewed via WebEx and determined that the Fee Module in Automation will be used to Assess Fees. WE WILL NOT configure fees to work from ASI, ASIT, or Workflow which is similar to how Permits Plus is configured.
- User Organization Chart
- Existing reports
- Other pertinent Land Management documentation obtained through the RFI process

##### Accela Responsibilities:



- Provide timely and appropriate responses to Agency's request for information.
- Conduct meetings via email, web conference, phone, and in person to complete required consulting.

Agency Responsibilities:

- Provide timely and appropriate responses to Accela's requests for information.
- Make available the appropriate Agency key users and content experts to provide required information, and participated as needed.
- Provide information about the Agency Users for the system including the Agency organizational structure.
- Schedule participants and meeting locations for activities.

Acceptance Criteria:

- Demonstration of the Mobile Home Permit in the Support environment. The agency will have three (3) business days total to review configuration.

**DELIVERABLE 6: BEST PRACTICE TEMPLATE OVERVIEW TRAINING, ANALYSIS AND SETUP (LAND)**

**Request for Information (RFI)**

Accela will conduct a desktop assessment of the Agency's current permitting initiatives. This assessment will focus on documentation review of existing fees, user organization structure, inspections, and other related written documentation. The documentation review will include, but not necessarily be limited to, the following:

- Most Current Fees (Fees were reviewed via WebEx and determined that the Fee Module in Automation will be used to Assess Fees. WE WILL NOT configure fees to work from ASI, ASIT, or Workflow which is similar to how Permits Plus is configured.
- User Organization Chart
- Existing reports
- Other pertinent Land Management documentation obtained through the RFI process

In terms of specific output, the following will be executed for this deliverable:

- Project Manager will draft a Request for Information (RFI) and submit to the Agency's Project Manager for dissemination to project team members.
- Project team members will review the land management documentation gathered through the RFI

Accela Responsibilities:

- Provide timely and appropriate responses to Agency's request for information.
- Conduct meetings via email, web conference, phone, and in person to complete required consulting.

Agency Responsibilities:

- Provide timely and appropriate responses to Accela's requests for information.
- Make available the appropriate Agency key users and content experts to provide required information, and participated as needed.
- Provide information about the Agency Users for the system including the Agency organizational structure.
- Schedule participants and meeting locations for activities.

Acceptance Criteria:

- Demonstration of the required record types in the Support Environment. The agency will have seven (7) business days total to review configuration.



**Training, Analysis and Setup**

The Civic Platform subscription includes turn-key best practice configurations in the specific domain of Land Management. These solutions include all of the record types and other items needed to conduct government business in these areas such as data items, fees, inspections, and work flow.

Accela resources will deliver Best Practice Templates for permitting, per the existing BPT data sheets that are available at the time of SOW execution.

The scope of work will be limited to providing training analysis, and setup of fifteen (25) Best Practice Templates. A sample list of twenty-five (25) Best Practice Template's has been provided in the table below.

Specifically, Accela resources will:

- Define and create user accounts with associated user groups/security access.
- Turn off unneeded record types
- Update and creation of Agency specific fee schedules. *All fees will be configured per the current calculation forms defined in the Accela Best Practice Template Configurations. Fees that require configuration using other methods or calculation forms will require additional effort and are outside the described scope.*
- Review minor changes to the existing BPT workflows

In terms of specific output, the following will be executed for this deliverable:

Set up of the best practice configurations limited to 25 BPT's listed below. The Most current Best Practice Template's v5 has been provided in the table below.

**Permitting and Inspections**

Commercial Addition	Commercial Re-Roof	Residential Plumbing	Residential Pool-Spa
Commercial Alteration	Residential Addition	Residential Re-Roof	Temporary Sign
Commercial Demolition	Residential Alteration	Multi-Family Addition	Permanent Sign
Commercial New	Residential Demolition	Multi-Family Alteration	Grading
Commercial Electrical	Residential New	Multi-Family Demolition	Fence Permit
Commercial Mechanical	Residential Electrical	Multi-Family New	Solar Permit
Commercial Plumbing	Residential Mechanical	Commercial Pool-Spa	

Any BPT may be renamed, assuming the BPT meets the requirements the additional permit type that is required.

Accela Responsibilities:

- Provide timely and appropriate responses to Agency's request for information.
- Conduct meetings via email, web conference, phone, and in person to complete required consulting.

Agency Responsibilities:

- Provide timely and appropriate responses to Accela's requests for information.
- Make available the appropriate Agency key users and content experts to provide required information, and participated as needed.
- Provide fee schedules, and other relevant information.
- Provide information about the Agency Users for the system including the Agency organizational structure.
- Schedule participants and meeting locations for activities.

Acceptance Criteria:

- Confirmed the users accounts are set up and working, unneeded record types are turned off and fees are set up and functional.

**DELIVERABLE 7: BEST PRACTICE TEMPLATE OVERVIEW TRAINING, ANALYSIS AND SETUP (LICENSING)**

**Request for Information (RFI)**

Accela will conduct a desktop assessment of the Agency's current Licensing initiatives. This assessment will focus on documentation review of existing fees, user organization structure, amendments, and other related written documentation. The documentation review will include, but not necessarily be limited to, the following:

- Most Current Fees
- User Organization Chart
- Existing reports
- Other pertinent Licensing documentation obtained through the RFI process

In terms of specific output, the following will be executed for this deliverable:

- Project Manager will draft a Request for Information (RFI) and submit to the Agency's Project Manager for dissemination to project team members.
- Project team members will review the Licensing documentation gathered through the RFI

Accela Responsibilities:

- Provide timely and appropriate responses to Agency's request for information.
- Conduct meetings via email, web conference, phone, and in person to complete required consulting.

Agency Responsibilities:

- Provide timely and appropriate responses to Accela's requests for information.
- Make available the appropriate Agency key users and content experts to provide required information, and participated as needed.
- Provide information about the Agency Users for the system including the Agency organizational structure.
- Schedule participants and meeting locations for activities.

Acceptance Criteria:

- Demonstration of the required record types in the Support Environment. The agency will have seven (7) business days total to review configuration.





**Training, Analysis and Setup**

The Civic Platform subscription includes turn-key best practice configurations in the specific domains of Licensing Management. These solutions include all of the record types and other items needed to conduct government business in these areas such as data items, fees, inspections, and work flow.

Accela resources will deliver Best Practice Templates for Licensing, per the existing BPT data sheets that are available at the time of SOW execution.

The scope of work will be limited to providing training analysis, and setup of ten (10) Best Practice Templates. The Most current Best Practice Template's v5 has been provided in the table below.

Specifically, Accela resources will:

- Define and create user accounts with associated user groups/security access.
- Turn off unneeded record types.
- Update and creation of Agency specific fee schedules. *All fees will be configured per the current calculation forms defined in the Accela Best Practice Template Configurations. Fees that require configuration using other methods or calculation forms will require additional effort and are outside the described scope.*
- Review minor changes to the existing BPT workflows.
- All Licensing Amendment records will be configured "As-Is". We will not configure special fields to track
  - Name of business change
  - Change of Suite number
  - Change of phone number
  - Change of rental property information
- The City will not use Exams Functionality.

In terms of specific output, the following will be executed for this deliverable:

- Set up of the best practice configurations limited to 10 of the 20 BPT's listed below:

**Licensing**  
**Local Licensing**

Retail License with application and renewal	Amusement License with application and renewal	Home Occupation License with application and renewal	Dog License with application and renewal
Restaurant License with application and renewal	Entertainment License with application and renewal	General Contractor License with application and renewal	Garage –Yard Sale License
Nightclub-Bar License with application and renewal	Service License with application and renewal	Electrical Contractor License with application and renewal	
Wholesaler License with application and renewal	Hotel-Motel-Lodging License with application and renewal	Mechanical Contractor License with application and renewal	
Manufacturer License with application and renewal	Vehicle for Hire License with application and renewal	Plumbing Contractor License with application and renewal	
Professional License with application and renewal	Street Vendor License with application and renewal	Special Event Licenser License with application	

Any BPT may be renamed, assuming the BPT meets the requirements the additional permit type that is required.

Accela Responsibilities:



- 
- Provide timely and appropriate responses to Agency's request for information.
  - Conduct meetings via email, web conference, phone, and in person to complete required consulting.

Agency Responsibilities:

- Provide timely and appropriate responses to Accela's requests for information.
- Make available the appropriate Agency key users and content experts to provide required information, and participated as needed.
- Provide fee schedules, and other relevant information.
- Provide information about the Agency Users for the system including the Agency organizational structure.
- Schedule participants and meeting locations for activities.

Acceptance Criteria:

- Confirmed the users accounts are set up and working, unneeded record types are turned off and fees are set up and functional.

## **DELIVERABLE 8: BEST PRACTICE TEMPLATE OVERVIEW TRAINING, ANALYSIS AND SETUP (ASSETS)**

### **Request for Information (RFI) for Assets**

Accela will conduct a desktop assessment of the Agency's current work order and asset management initiatives. This assessment will focus on documentation review of existing utility master plans, defined asset management workflows, current inspection and maintenance schedules, established levels of service / associated performance metrics, asset management software applications, and other related written documentation. The documentation review will include, but not necessarily be limited to, the following:

- Material list in template format
- List of users and groups
- Existing reports

In terms of specific output, the following will be executed for this deliverable:

- Project Manager will draft a Request for Information (RFI) and submit same to the Agency's Project Manager for dissemination to District project team members.
- Project team members will review the asset management documentation gathered through the RFI

Accela Responsibilities:

- Provide timely and appropriate responses to Agency's request for information.
- Conduct meetings via email, web conference, phone, and in person to complete required consulting.

Agency Responsibilities:

- Provide timely and appropriate responses to Accela's requests for information.
- Make available the appropriate Agency key users and content experts to provide required information, and participated as needed.
- Provide information about the Agency Users for the system including the Agency organizational structure.
- Schedule participants and meeting locations for activities.

Acceptance Criteria:

- Demonstration of the required record types in the Support Environment. The agency will have seven (7) business days total to review configuration.



**Training, Analysis and Setup**

The Civic Platform subscription includes turn-key best practice configurations in the specific domains of Land Management. These solutions include all of the record types and other items needed to conduct government business in these areas such as data items, fees, inspections, and work flow.

Accela resources will deliver Best Practice Templates for asset management per the existing Best Practice Templates data sheets. This will also include a Service Request BPT. The scope of work will be limited to providing training analysis, and setup of thirty (30) Best Practice Templates. A sample list of thirty-six (36) Best Practice Template's has been provided in the table below. The agency will be able to select up to thirty (30) Best Practice Templates from this list. Additionally, Accela will provide up to forty (40) hours of Best Practice Template enhancements related to the thirty (30) selected Best Practice Templates.

Specifically Accela resources will:

- Define and create user accounts with associated user groups/security access.
- Turn off unneeded record types
- Review minor changes to the workflows that can be updated in the DEV environment while on-site

In terms of specific output, the following will be executed for this deliverable:

- Set up of the best practice templates per the list below:

*Fleet*

Equipment	Vehicle		
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*Wastewater System*

Inlet	Lift Station	Backflow Preventer	Main
Manhole	Meter	Node	Pump
Service Line	Storage Basin		

*Stormwater*

Backflow Preventer	Channel	Levee	Culvert
Curb and Gutter	Lift Station	Main	Manhole
Node	Pump	Service line	Storage Basin

*Street and Traffic Control Devices, Tree*

Bridge	Curb and Gutter	Intersection	Intelligent Transportation System (ITS)
Sidewalk	Light	Segment	Sign
Signal	Substation	Support	Tree

Accela Responsibilities:

- Provide timely and appropriate responses to Agency's request for information.
- Conduct meetings via email, web conference, phone, and in person to complete required consulting.



#### Agency Responsibilities:

- Provide timely and appropriate responses to Accela's requests for information.
- Make available the appropriate Agency key users and content experts to provide required information, and participated as needed.
- Provide fee schedules, and other relevant information.
- Provide information about the Agency Users for the system including the Agency organizational structure.
- Schedule participants and meeting locations for activities.

#### Acceptance Criteria:

- Confirmed the users accounts are set up and working, unneeded record types are turned off and fees are set up and functional.
- Demonstration of the required record types in the Support Environment. The agency will have seven (7) business days total to review configuration.

### **DELIVERABLE 9: STANDARD ADDRESS, PARCEL AND OWNERSHIP (APO) CONVERSION (LAND)**

Accela leverages a standardized data conversion process for APO data sets and will deliver the standard APO specifications and file templates to be used by the Agency in preparing the data for conversion. Accela will provide an the initial, one-time load of that reference property data set, as well as one load at the time of go-live. The initial process loads the property information directly and the periodic process loads and converts only new changed property information. This means, that upon go live and when the data is provided by the agency, staff will have an initial reference property data set loaded in the system ready for use, with updates to that data handled by Agency staff using Accela screens. When changes occur regarding property, such as ownership changes or a new set of APO are added to the agency, staff would manually enter those changes directly within the solution. It is imperative that the agency take ownership of learning to publish the data set in the prescribed format for future loads into the Civic Cloud.

In terms of specific output, the following will be executed for this deliverable:

- Deliver standard APO specification document for Agency use.
- Load of Agency supplied APO data into Accela Automation Support.

#### Accela Responsibilities:

- Manage and validate APO source data - Obtain data file from and provide to Accela up to three (3) times after the initial load into support and one (1) time into production.
- Load supplied data and execute conversion program.
- Provide the log files from conversion program and work with agency to update data as needed up to the specified loads above in the 1<sup>st</sup> bullet.

#### Agency Responsibilities:

- Provide the address, parcel and owner information data to Accela in the specified format as per the Accela APO Conversion Guide for the current release.
- Any updates and changes to the source data identified in the provided log files

#### Acceptance Criteria:

- Successfully search for and retrieve loaded Address, Parcel, and Owner information



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## DELIVERABLE 10: HISTORICAL DATA CONVERSION ANALYSIS AND DEVELOPMENT (LAND)

Accela will provide a routine to convert an Access DB to SQL Server (NOTE-the agency may upgrade from an Access DB to SQL Server database before the implementation begins, this upgrade will save the Accela team approximately 10 hours of work but will save the agency up to 60 hours of work over the implementation lifecycle, Accela recommends an upgrade of Permits Plus prior to the implementation of Accela Automation) for the historical Permits Plus data conversion. Accela will use standard routines to modify the Permits Plus database. It is important to note that upon modifying the Permits Plus database so that the standard data mapping tool can read the database the agency will be required to map all of the screen fields. As discussed with the agency no User Defined screen fields will be mapped and converted to Accela Automation as many of the fields are Yes/No fields to calculate fees. Fees will NOT be converted. If the Agency choose to convert Fees "AS-IS" with no fee schedule associated to the fees, the addition of fees to the conversion would result in an increase of the fees associated to deliverable and a Change Order. Any new fee calculations will require the agency to void incorrect fees and calculate using configured logic.

In terms of specific output, the following will be executed for this deliverable:

- Data Mapping Spreadsheets.
- Permits Plus Data will be converted into the Accela Automation Database.

### Accela Responsibilities:

- Assist the Agency to define and document historical data elements that are required for the conversion.
- Execute a Standard program to migrate historical data into the Agency's Automation database environment in a single record.
- Execute the conversion up to 3 times so that the agency can review the data. The 1<sup>st</sup> conversion will not be a 100% complete as the goal is to convert base data, such as, Record Types, Addresses, Parcels, Owners, and Description of Work.

### Agency Responsibilities:

- Facilitate the data analysis and mapping process.
- Complete the Data Conversion Mappings in the Accela provided tools and Excel Spreadsheets as provided by Accela.
- Provide historical data in acceptable formats.
- Provide subject matter experts on the data source to identify key components of the historical data.
- Provide subject matter experts on the historical configuration to work on the data mapping process.
- Review and sign-off on completed Data Conversion Mapping document.
- In Process permits are to be entered manually into Automation or finished in current system.

### Acceptance Criteria:

- Verify historical data has been converted to Accela Automation Support in a single record type according to the Data Conversion Mapping document.

### Acceptance Review Period:

- Three (3) business days total to review configuration document before deployment

## DELIVERABLE 11: HISTORICAL DATA CONVERSION ANALYSIS AND DEVELOPMENT (LICENSING)

Accela will provide a routine to convert the Licensing data into the Accela Automation database. It is important to note that upon importing the flat file Licensing database so that the standard data mapping tool can read the data the agency will be required to map all of the fields.



Fees will be converted "AS-IS" with no fee schedule associated to the fees. Any new fee calculations will require the agency to void incorrect fees and calculate using configured logic.

In terms of specific output, the following will be executed for this deliverable:

- Data Mapping Spreadsheets.
- Licensing Data for Applications and Licenses converted from Legacy system to Accela Automation.

Accela Responsibilities:

- Assist the Agency to define and document historical data elements that are required for the conversion.
- Execute a Standard program to migrate historical data into the Agency's AUTOMATION database environment in a single record.
- Execute the conversion up to 3 times so that the agency can review the data. The 1<sup>st</sup> conversion will not be a 100% complete as the goal is to convert base data, such as, Record Types, Addresses, Parcels, Owners, and Description of Work

Agency Responsibilities:

- Facilitate the data analysis and mapping process.
- Complete the Data Conversion Mappings in the Accela provided tools and Excel Spreadsheets as provided by Accela.
- Provide historical data in acceptable formats.
- Provide subject matter experts on the data source to identify key components of the historical data.
- Provide subject matter experts on the historical configuration to work on the data mapping process.
- Review and sign-off on completed Data Conversion Mapping document.
- In Process Licenses are to be entered manually into Automation or finished in current system
- Extract data using RSA Connection into a Flat File Format specified by Accela.

Acceptance Criteria:

- Verify historical data has been converted to Accela Automation Support in a single record type according to the Data Conversion Mapping document.

Acceptance Review Period:

- Three (3) business days total to review configuration document before deployment

## **DELIVERABLE 12: HISTORICAL DATA CONVERSION ANALYSIS AND DEVELOPMENT (ASSETS)**

Accela will provide a routine to convert the Assets data into the Accela Automation database. It is important to note that upon modifying the Asset database so that the standard data mapping tool can read the database the agency will be required to map all of the fields.

In terms of specific output, the following will be executed for this deliverable:

- Data Mapping Spreadsheets.
- Asset Data Converted from Access Database to Accela Automation.

Accela Responsibilities:

- Assist the Agency to define and document historical data elements that are required for the conversion.
- Execute a Standard program to migrate historical data into the Agency's AUTOMATION database environment in a single record.



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- Execute the conversion up to 3 times so that the agency can review the data. The 1<sup>st</sup> conversion will not be a 100% complete as the goal is to convert base data, such as, Record Types, Addresses, Parcels, Owners, and Description of Work

Agency Responsibilities:

- Facilitate the data analysis and mapping process.
- Complete the Data Conversion Mappings in the Accela provided tools and Excel Spreadsheets as provided by Accela.
- Provide historical data in acceptable formats.
- Provide subject matter experts on the data source to identify key components of the historical data.
- Provide subject matter experts on the historical configuration to work on the data mapping process.
- Review and sign-off on completed Data Conversion Mapping document.
- In Process permits are to be entered manually into Automation or finished in current system.
- Extract data from Filemaker Pro database to Access Database.

Acceptance Criteria:

- Verify historical data has been converted to Accela Automation Support in a single record type according to the Data Conversion Mapping document.

Acceptance Review Period:

- Three (3) business days total to review configuration document before deployment



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## **DELIVERABLE 13: ACCELA CITIZEN ACCESS CONFIGURATION (ALL)**

This deliverable includes setup, analysis, and configuration for the Accela Citizen Access (ACA) software per the best practice template configurations. Subsequently, Accela will work with the Agency representatives to assess and implement Accela Citizen Access to extend certain aspects of the internal Accela Automation configuration for use by the general public.

In terms of specific output, the following will be executed for this deliverable:

- Deliver BPT Accela Citizen Access Configuration Document (MS Word)
- Disable unwanted ACA BPT functionality

### Accela Responsibilities:

- Install and setup Accela Citizen Access
- Work with Agency to determine which services they do not want to exposed to the public via Accela Citizen Access and disable those services.
- Load banner files for citizen access

### Agency Responsibilities:

- Application Record Enablement List
- Disclaimer Text
- Branding files – top and side banner
- Perform testing of all Online Record types for purposes of validating the configuration.

### Acceptance Criteria:

- Demonstration of the operational Accela Citizen Access functionality for enabled records

## **DELIVERABLE 14: SPECIFICATIONS DOCUMENT FOR GAS INTEGRATION WITH PHOENIX 8000**

Accela will provide a one –way interface between Phoenix 8000 to Accela Automation. The goal is to create preventative maintenance work orders based on equipment usage or mileage. The work orders created will be those defined in deliverable 13 as defined in the BPT's. Accela will not create customer work orders or service requests to handle the data coming from Phoenix 8000. In order to determine the Agency requirements for this interface, analysis sessions will be conducted as a portion of this deliverable. The findings will then be documented in the Interface Specifications Document for use by Accela in building the interface code. The implementation of the interface is dependent on the assistance of the Agency's staff, specifically, interface analysis, data mapping, and data manipulation as required in the source system.

In terms of specific output, the following will be executed for this deliverable:

- Interface specification document

### Accela Responsibilities:

- Provide timely and appropriate responses to Agency's request for information.
- Conduct Interface Analysis sessions.
- Work with Agency staff to develop interface specifications document.





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Agency Responsibilities:

- Provide timely and appropriate responses to Accela's request for information.
- Allocate the time for qualified business and technical experts for the testing sessions that are critical to the project success.
- Identify and coordinate any related tools used to implement the interface (3rd party or in-house development).
- Assist in the interface specification development and data mapping process.
- Review and approve the interface specification documents.

Acceptance Criteria:

- Review and approve the Interface Specifications document.

Acceptance Review Period:

- Five (5) business days total

### **DELIVERABLE 15: DEVELOP GAS INTEGRATION INTERFACE**

Upon approval of the Phoenix 8000 Interface Specifications document, the Accela team will develop the interface.

In terms of specific output, the following will be executed for this deliverable:

- Demonstration of operational interface

It is assumed the interface will need to consist of an agency hosted adapter that can read from the Phoenix system database and communicate with Accela via web services. This may include the creation of triggers/stored procedures inside the Phoenix database.

Accela Responsibilities:

- Use an Accela web service or other tool to implement the interface functionality based on the specifications.
- Build all aspects of the interface that interact directly with the Accela Automation.

Agency Responsibilities:

- Validate interface through testing.
- Work with Phoenix 8000 Data Source to ensure proper data is being pushed to Accela system.
- Work with Phoenix 8000 Data Source software to ensure data from Accela is in correct format.

Acceptance Criteria:

- Demonstration and approval of the completed interface as per the requirements detailed in the interface specifications document.

Acceptance Review Period:

- Five (5) business days total

### **DELIVERABLE 16: CSLB INTERFACE**

Accela will provide a pre-defined adapter to load licensed professional data from the California State License Board to the Accela Automation licensed professional forms. When a License Professional is added to a new record and validated via the CSLB interface, the professional can be added to the reference tables. It is important to note that the State of California updates the adapter from time-to-time and Accela has no control of what functionality they provide. Accela will provide a template specification as the adapter cannot be changed. Upon approval of the Templated Licensed Professional Interface Specifications document, the Accela team will deploy that standard interface that will populate the Accela system with the appropriate data.

In terms of specific output, the following will be executed for this deliverable:



- Demonstration of operational interface per the Licensed Professional Interface Document

#### Accela Responsibilities:

- Use an Accela web service or other tool to implement the interface functionality based on the specifications.
- Build all aspects of the version of the interface currently in use for CSLB that interacts directly with the Accela Automation.

#### Agency Responsibilities:

- Validate interface through testing.
- Work with Licensed Professional Data Source to ensure proper data is being pushed to Accela system.

#### Acceptance Criteria:

- Demonstration and approval of the completed interface as per the requirements detailed in the interface specifications document.

#### Acceptance Review Period:

- Five (5) business days total.

### **DELIVERABLE 17: INTERFACE TO FINANCIAL SYSTEM (BI-DIRECTIONAL)**

The Agency has requested that a custom interface to the agency's current financial system be developed. This interface would be bidirectional, communicating permit and fee information to the financial system and information on payment collected through the financial system to Accela Automation.

This interface would consist of an agency hosted financial interface adapter that would communicate with the agency's financial system via web services, a database connection or an agency or vendor provided API and communicate with Accela Automation through the published web services available on the Accela biz server.

In order for payment to be posted from the financial system to Accela Automation the following information must be provided in the payment information:

Record locator - i.e. record alternate identifier. Eg. Permit number, record number.

Payment total amount

Payment date

Fee Item payment allocation - note if the agency decides to not include fee item detail information in the payment information, internal Accela Automation payment allocation logic may be leverage instead.

In the event that the agency wishes to accommodate license renewal payment through this interface, special accommodations in the adapter may need to be made to translate the license number included in the payment information to the current renewal cycle.

The following is a list of Deliverables:

- Specification Document for the Custom Adapter
- Development of the Customer Adapter per the specification

#### Accela Responsibilities:

- Provide timely and appropriate responses to Agency's request for information.
- Conduct meetings via email, web conference, phone, and in person to complete required consulting.
- Develop a custom adapter based upon feedback provided by the agency and desired adapter to merchant account.

#### Agency Responsibilities:



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- Provide timely and appropriate responses to Accela's requests for information.
  - Make available the appropriate Agency key users and content experts to provide required information, and participated as needed.
  - Setup meetings with subject matter experts on the agency's financial system.
  - Schedule participants and meeting locations for activities.
  - Provide agency server to host adapter
  - Work with Accela staff to deploy and configure VPN tunnel between Accela servers and the server hosting the adapter.

Acceptance Criteria:

- Demonstration of the custom adaptor. The agency will have three (3) business days total to review configuration before it is deployed to the Production site.

### **DELIVERABLE 18: REPORT SPECIFICATIONS (ALL)**

Reports are defined as anything that can be printed from the system, including but not limited to, reports, forms, documents, notices, and letters that the Agency wishes to print as identified during configuration analysis. The Configuration Document will define the reports and documents that are required by the Agency to effectively use Accela Automation. These reports will be broken down by level of effort and identified in the configuration document. It is expected that, after the appropriate training on the database and the selected report writing tool is completed, Agency personnel will be able to handle additional and future report requirements. Reports are classified by level of effort: high, medium, and low. High is defined as a report containing significant calculation and/or extensive detail and number of fields – for example a financial statistical report or complex work order History report. The majority of reports require a 'medium' level of effort, which is defined as a report displaying non-calculated and minimal calculated data fields. Reports with a low level of effort are typically letters or notices that contain contact information and basic application data.

These reports can be developed using the integral Ad Hoc Report Writer included with Accela Automation or Crystal Reports XI Server at the Agency's discretion. These custom reports, whether developed with Ad Hoc Report Writer or Crystal Reports, will be deployed in the Report Manager for use within Accela Automation.

Accela will develop documents/letters/reports from those identified by the Agency as required for the new system.

Accela and Agency have agreed that the Agency will develop all necessary reports. Accela will provide report specifications for up to 60 hours, the goal will be for Accela to develop the specifications for all reports that cannot be developed in the Ad Hoc Report Writer. The Agency will approve report design specification documents that will be created jointly by the Agency and Accela.

A proven strategy that combines the use of the Accela Automation Quick Queries, custom reports that include run-time parameters to allow similar reports to be combined, and the development of other reports by the Agency after training, can ensure that all required reporting requirements are met.

In terms of specific output, the following will be executed for this deliverable:

- List of identified reports that Agency will develop and reports that Accela will develop
- Report Specifications Documents for each of the identified reports up to sixty (60) hours.

Accela Responsibilities:

- Assist in determining level of effort for reports to assist with prioritization.
- Develop report specifications up to sixty (60) hours.

Agency Responsibilities:

- Identify and approve reports to be specified by Accela
- Provide timely and appropriate responses to Accela's request for information.
- Make available the appropriate key users and content experts to participate in the report specification.
- Provide information and data in the formats specified by Accela that will be needed for agreement on the Deliverable.

Acceptance Criteria:

- Agreement on prioritized list of reports that will be developed by Accela.
- Creation of report specification documents up to sixty (60) hours
- Agency will have 5 business days to review the Report Specification Documents. If no changes or comments are requested within the 10 days, the Report Specification Documents are considered approved by the Agency.

**DELIVERABLE 19: REPORT DEVELOPMENT (ALL)**

Accela will develop custom documents/letters/reports per the specifications developed and approved in Deliverable 18, Report Specifications. Changes to the report specifications after approval can negatively impact project progress and the overall schedule. Therefore, changes to the report specifications after approval requires an analysis by Accela to determine the level of effort required, and if a change order would be required to complete the work.

In terms of specific output, the following will be executed for this deliverable:

- This will be limited to eighty (80) hours of report development.

Accela Responsibilities:

- Provide timely and appropriate responses to Agency's request for information.
- Develop reports per specifications based on hour allocation.
- Assist in the validation of the reports in support environment.

Agency Responsibilities:

- Provide timely and appropriate responses to Accela's request for information.
- Make available the appropriate key users and content experts to participate in the report development and validation activities.
- Request change order if changes to specifications are required.

Acceptance Criteria:

- Development of reports specified through execution of Deliverable 18, Report Specifications, up to a maximum of eighty (80) hours.

**DELIVERABLE 20: ACCELA GIS CONFIGURATION (ALL)**

Accela will configure Accela GIS to use Bing Maps and one ArcGIS Map Service as part of the BPT initial setup. The following are the main objectives being pursued through the implementation of the Accela GIS for all departments:

- View selection, location, and associated GIS information.
- Create a permit record from the ArcGIS Map Service.
- Configure GIS to sync with Accela Automation Assets.
- No Sync of ASI Attributes for the Land or License Module will occur

In terms of specific output, the following will be executed for this deliverable:

- Demonstration of GIS displaying data within Accela Automation

Accela Responsibilities:

- Demonstrate that the Accela GIS applications are operational in the Agency computing environment thus communicating with the Accela Automation system.

Agency Responsibilities:

- Provide people and physical resources based on the dates outlined in the project schedule.
- Provide Accela with network access for remote installation and testing.
- Provide information and data in the formats specified by Accela that will be needed for the GIS implementation.
- Implement a VPN Tunnel as specified by Accela or Provide the ArcGIS map service public facing as required by Accela.

Acceptance Criteria:

- Demonstration of operating Accela GIS in support environment.

### **DELIVERABLE 21: ACCELA APPS CONFIGURATION (ALL)**

Accela will configure the Accela Apps for Download and use. Accela will provide up to two (2) days of training to use the Accela Inspector App via the iPad. The following are the main objectives being pursued through the implementation of the Accela Apps for all departments:

- View and Result Inspections.
- Create and access work orders, specifically, view locations of scheduled/completed work. Check one or more Work Order Tasks.

In terms of specific output, the following will be executed for this deliverable:

- Download Accela Inspector or Accela Work Crew and login to the Support environment.
- Provide up to two (2) days of training.

Accela Responsibilities:

- Demonstrate that the Accela Apps are operational in the Agency computing environment thus communicating with the Accela Automation system.

Agency Responsibilities:

- Provide people and physical resources based on the dates outlined in the project schedule.
- Attend the Scheduled Training.
- Provide the approved Hardware that the Accela Apps can be installed and executed.

Acceptance Criteria:

- Demonstration of operating Accela Apps in support environment.

### **DELIVERABLE 22: ADMINISTRATIVE AND TECHNICAL TRAINING (ALL)**

The platform includes access to a large library of agency staff administrator and agency end user training materials in the Accela Community system, available on line and self-paced, at no additional cost.

This online training focuses on the administration, maintenance, and augmentation of its Accela Automation configuration.

In terms of specific output, the following will be executed for this deliverable:

- 16 hours of preparation prior to training
- 24 hours of Administration training
- 8 hours of Basic EMSE training
- 4 hours of Basic Ad-Hoc Report training
- 20 hours of remote training support

Accela Responsibilities:

- Coordinate with the Agency to set up use of online training
- Coordinate and deliver additional hours of remote training to augment online learning

Agency Responsibilities:

- Select and prepare the power-users who will be participating in the training and subsequently training end users.
- Arrange the time and qualified people for the training who are critical to the project success.
- Ensure that users are proficient in using PC's in a Windows environment as a prerequisite for the course.
- Ensure that users are familiar with use of standard Internet browsers as a prerequisite for the course.

Acceptance Criteria:

- Access online training guides published to the Accela Community
- Complete 24 hours of Administration training
- Complete 8 hours of Basic EMSE training
- Complete 4 hours of Basic Ad-Hoc Report training
- Complete 20 hours of remote training

## **DELIVERABLE 23: END USER TRAINING (LAND)**

Accela will provide 32 hours of end user training.

In terms of specific output, the following will be executed for this deliverable:

- 16 hours of onsite and 16 hours of offsite end user training for the Land Module

Accela Responsibilities:

- Coordinate with the Agency to set up use of online training
- Coordinate and deliver additional hours of remote training to augment online learning

Agency Responsibilities:

- Select and prepare the power-users who will be participating in the training and subsequently training end users.
- Arrange the time and qualified people for the training who are critical to the project success.
- Ensure that users are proficient in using PC's in a Windows environment as a prerequisite for the course.
- Ensure that users are familiar with use of standard Internet browsers as a prerequisite for the course.

Acceptance Criteria:

- Access online training guides published to the Accela Community

- Complete 16 hours of onsite end user training
- Complete 16 hours of offsite end user training

#### **DELIVERABLE 24: END USER TRAINING (LICENSING)**

Accela will provide 32 hours of end user training.

In terms of specific output, the following will be executed for this deliverable:

- 16 hours of onsite and 16 hours of offsite end user training for the Licensing Module

##### Accela Responsibilities:

- Coordinate with the Agency to set up use of online training
- Coordinate and deliver additional hours of remote training to augment online learning

##### Agency Responsibilities:

- Select and prepare the power-users who will be participating in the training and subsequently training end users.
- Arrange the time and qualified people for the training who are critical to the project success.
- Ensure that users are proficient in using PC's in a Windows environment as a prerequisite for the course.
- Ensure that users are familiar with use of standard Internet browsers as a prerequisite for the course.

##### Acceptance Criteria:

- Access online training guides published to the Accela Community
- Complete 16 hours of onsite end user training
- Complete 16 hours of offsite end user training

#### **DELIVERABLE 25: END USER TRAINING (ASSETS)**

Accela will provide 32 hours of end user training.

In terms of specific output, the following will be executed for this deliverable:

- 16 hours of onsite and 16 hours of offsite end user training for the Assets Module

##### Accela Responsibilities:

- Coordinate with the Agency to set up use of online training
- Coordinate and deliver additional hours of remote training to augment online learning

##### Agency Responsibilities:

- Select and prepare the power-users who will be participating in the training and subsequently training end users.
- Arrange the time and qualified people for the training who are critical to the project success.
- Ensure that users are proficient in using PC's in a Windows environment as a prerequisite for the course.
- Ensure that users are familiar with use of standard Internet browsers as a prerequisite for the course.

##### Acceptance Criteria:

- Access online training guides published to the Accela Community
- Complete 16 hours of onsite end user training
- Complete 16 hours of offsite end user training

## **DELIVERABLE 26: USER ACCEPTANCE TESTING (UAT) (LAND)**

This deliverable is comprised of the assistance Accela will provide to allow the Agency to accept that the solution meets the requirements as documented in all the deliverables. Accela will assist the Agency in the testing and validation of the solution and its readiness to be migrated to production for active use and will assist in transferring the solution and any required data from Support to Production.

Accela will provide of support for training, oversight, answering questions and addressing issues discovered in User Acceptance Testing. It should be noted that it is critical that the Agency devote ample time and resources to his effort to ensure that the system is operating per signed specifications and ready for the move to production. The testing effort will require a significant time investment by the Agency, and coordination of resources is critical. At this point in the implementation process, the Agency should test individual components of functionality of the solution (i.e., functional and/or unit testing), and also test to ensure that the interrelated parts of the Accela Automation solution are operating properly (i.e., integration testing).

Accela will provide assistance to the Agency as needed by providing User Acceptance Testing (UAT) support and facilitating completion of UAT. Accela will address and rectify issues discovered during the UAT process as Agency staff executes testing activities. Accela will work with the Agency to develop a test plan and deliver sample test scripts, as well as an issue log to track the progress of testing. It should be noted that Accela will plan for a total of Forty (40) hours to complete this deliverable.

If the Agency does not devote adequate time and staffing to UAT in order to completely test the solution, Accela may opt to postpone go-live at the Agency's expense. Accela will work diligently with Agency to ensure this does not occur and provide several opportunities for the Agency to add additional staff and time to this effort before recommending a postponement or delay.

In terms of specific output, the following will be executed for this deliverable:

- Resolution of configuration issues resulting from Agency End User Testing.
- Fully-tested system that is ready to move to a production environment.

### Accela Responsibilities:

- Provide recommendations on testing strategy and best practices.
- Provide Accela Best Practices Test Scripts.
- Support User Acceptance testing effort and the validation of the system configuration and its readiness to be migrated to production for active use.
- Resolution of issues as a result of User Acceptance Testing activities.

### Agency Responsibilities:

- Provide timely and appropriate responses to Accela's request for information.
- Make available the appropriate Agency key users and content experts to participate in user acceptance testing as defined and managed by Agency.
- Modify or enhance the User Acceptance test scripts provided.
- Utilize the use cases documented in each Configuration Document Deliverable as the basis for the acceptance of this Deliverable.

### Acceptance Criteria:

- Up to forty (40) hours of UAT which includes recommendations, test scripts and user acceptance support.



## **DELIVERABLE 27: USER ACCEPTANCE TESTING (UAT) (LICENSING)**

This deliverable is comprised of the assistance Accela will provide to allow the Agency to accept that the solution meets the requirements as documented in all the deliverables. Accela will assist the Agency in the testing and validation of the solution and its readiness to be migrated to production for active use and will assist in transferring the solution and any required data from Support to Production.

Accela will provide of support for training, oversight, answering questions and addressing issues discovered in User Acceptance Testing. It should be noted that it is critical that the Agency devote ample time and resources to his effort to ensure that the system is operating per signed specifications and ready for the move to production. The testing effort will require a significant time investment by the Agency, and coordination of resources is critical. At this point in the implementation process, the Agency should test individual components of functionality of the solution (i.e., functional and/or unit testing), and also test to ensure that the interrelated parts of the Accela Automation solution are operating properly (i.e., integration testing).

Accela will provide assistance to the Agency as needed by providing User Acceptance Testing (UAT) support and facilitating completion of UAT. Accela will address and rectify issues discovered during the UAT process as Agency staff executes testing activities. Accela will work with the Agency to develop a test plan and deliver sample test scripts, as well as an issue log to track the progress of testing. It should be noted that Accela will plan for a total of one-hundred sixty (160) hours to complete this deliverable.

If the Agency does not devote adequate time and staffing to UAT in order to completely test the solution, Accela may opt to postpone go-live at the Agency's expense. Accela will work diligently with Agency to ensure this does not occur and provide several opportunities for the Agency to add additional staff and time to this effort before recommending a postponement or delay.

In terms of specific output, the following will be executed for this deliverable:

- Resolution of configuration issues resulting from Agency End User Testing.
- Fully-tested system that is ready to move to a production environment.

### Accela Responsibilities:

- Provide recommendations on testing strategy and best practices.
- Provide Accela Best Practices Test Scripts.
- Support User Acceptance testing effort and the validation of the system configuration and its readiness to be migrated to production for active use.
- Resolution of issues as a result of User Acceptance Testing activities.

### Agency Responsibilities:

- Provide timely and appropriate responses to Accela's request for information.
- Make available the appropriate Agency key users and content experts to participate in user acceptance testing as defined and managed by Agency.
- Modify or enhance the User Acceptance test scripts provided.
- Utilize the use cases documented in each Configuration Document Deliverable as the basis for the acceptance of this Deliverable.

### Acceptance Criteria:

- Up to one hundred and sixty (160) hours of UAT which includes recommendations, test script templates and user acceptance support.

## **DELIVERABLE 28: USER ACCEPTANCE TESTING (UAT) (ASSET)**

This deliverable is comprised of the assistance Accela will provide to allow the Agency to accept that the solution meets the requirements as documented in all the deliverables. Accela will assist the Agency in the testing and validation of the solution and its readiness to be migrated to production for active use and will assist in transferring the solution and any required data from Support to Production.

Accela will provide of support for training, oversight, answering questions and addressing issues discovered in User Acceptance Testing. It should be noted that it is critical that the Agency devote ample time and resources to his effort to ensure that the system is operating per signed specifications and ready for the move to production. The testing effort will require a significant time investment by the Agency, and coordination of resources is critical. At this point in the implementation process, the Agency should test individual components of functionality of the solution (i.e., functional and/or unit testing), and also test to ensure that the interrelated parts of the Accela Automation solution are operating properly (i.e., integration testing).

Accela will provide assistance to the Agency as needed by providing User Acceptance Testing (UAT) support and facilitating completion of UAT. Accela will address and rectify issues discovered during the UAT process as Agency staff executes testing activities. Accela will work with the Agency to develop a test plan and deliver sample test scripts, as well as an issue log to track the progress of testing. It should be noted that Accela will plan for a total of sixty-four (64) hours to complete this deliverable.

If the Agency does not devote adequate time and staffing to UAT in order to completely test the solution, Accela may opt to postpone go-live at the Agency's expense. Accela will work diligently with Agency to ensure this does not occur and provide several opportunities for the Agency to add additional staff and time to this effort before recommending a postponement or delay.

In terms of specific output, the following will be executed for this deliverable:

- Resolution of configuration issues resulting from Agency End User Testing.
- Fully-tested system that is ready to move to a production environment for the Asset Module.

### Accela Responsibilities:

- Provide recommendations on testing strategy and best practices.
- Provide Accela Best Practices Test Scripts.
- Support User Acceptance testing effort and the validation of the system configuration and its readiness to be migrated to production for active use.
- Resolution of issues as a result of User Acceptance Testing activities.

### Agency Responsibilities:

- Provide timely and appropriate responses to Accela's request for information.
- Make available the appropriate Agency key users and content experts to participate in user acceptance testing as defined and managed by Agency.
- Modify or enhance the User Acceptance test scripts provided.
- Utilize the use cases documented in each Configuration Document Deliverable as the basis for the acceptance of this Deliverable.

### Acceptance Criteria:

- Up to sixty-four (64) hours of UAT which includes recommendations, test script templates and user acceptance support.

## **DELIVERABLE 29: POST DEPLOYMENT SUPPORT AND TRANSITION TO CRC (LAND, LICENSING, AND ASSETS)**

This deliverable is comprised of the post- Production support assistance that Accela will provide to address issues and provide consultative advice immediately following the move to Production for daily use. Accela will provide support for sixty (64) hours immediately following deployment (go-live). It is assumed that Land and Assets will go live concurrently. At the end of the support period, a formal meeting will be



scheduled with the Agency, Accela Services Team, and Accela CRC for the purpose of transitioning support of the Agency to Accela CRC. The meeting will be scheduled within two weeks after Go-Live

Accela will work with the Agency to identify and address issues identified during this period using a Post Production Issues List. This list will be comprised of issues related to the defined deliverables listed in this SOW, which will be addressed by Accela, as well as any other issues which will be addressed by the Agency. Examples of issues the Agency is responsible for include training issues, functional changes beyond the scope of this Statement of Work, cosmetic changes, and procedures related to the use of Accela Automation. Specifically, Accela will not be developing or creating additional reports, conversions, records types and workflow processes that were not included in the scope of this project.

In terms of specific output, the following will be executed for this deliverable:

- Eighty (80) hours of Post Deployment Support.
- Finalized Post Production Issues List.
- Transition of the Agency from Services team to Customer Resource Center for ongoing support.

#### Accela Responsibilities:

- Provide post-production support for Accela developed configuration and components.
- Assist with the identification of issues for the Post Production Issues List.
- Assist with issues that may arise related to the deliverables in this SOW.
- Transfer ongoing support of the client and to the CRC to address any post Production issues that require remediation.

#### Agency Responsibilities:

- Provide technical and functional user support for post-production support and monitoring.
- Develop and maintain a Post Production Issues List.
- Provide timely and appropriate responses to Accela's request for information.
- Make available the appropriate Agency key users and content experts to participate in user acceptance testing as defined and managed by the Agency.

#### Acceptance Criteria:

- Execution of eighty (80) hours of post-Production support.
- Official transfer from the Accela Services project team to the Customer Resource Center (CRC).

### **DELIVERABLE 30: PROJECT MANAGEMENT – 18 MONTHS**

Accela will provide a project manager and oversight for services throughout the implementation (up to the agreed upon number of hours) in order to plan and monitor execution of the project in accordance with deliverables outlined in the Statement of Work. To support the implementation of the Accela Automation software at the Agency, Accela will provide Project Management services throughout the project. Generally these services include the following:

In terms of specific output, the following will be executed:

- Project Management Provided for Project
- Project Oversight Provided for Project

#### Accela Responsibilities:

- Project plan management using Microsoft Project 2010,
- Issue log management and escalation,



- 
- Status reporting,
  - Change order management,
  - Accela resource management,
  - Executive project oversight and quality assurance

Agency Responsibilities:

- Work with Accela Project Manager to keep project plan current
- Agency resource management
- Use of Accela processes and tools for issue log maintenance and status reporting

Acceptance Criteria:

- Project Management delivered for project
- Project Executive oversight delivered for project

## **PAYMENT TERMS**

### **PAYMENT SCHEDULE**

Accela will perform the Services on a Deliverable payment schedule basis based on: the nature and scope of the Services and associated Deliverables as outlined herein, the expected staffing requirements, project schedule, Accela's and Customer's roles and responsibilities and the other assumptions set forth in this SOW. Accela's total price to perform the Services and provide the Deliverables described is \$597,210.00 exclusive of taxes and expenses. This price is based on the information available at the time of signing and the assumptions, dependencies and constraints, and roles and responsibilities of the Parties, as stated in this SOW. The table below illustrates the payment schedule for the duration of this project.



	DESCRIPTION	AMOUNT
Deliverable 1	PROJECT INITIATION	\$ 4,080.00
Deliverable 2	ACCELA AUTOMATION SETUP	\$ 2,720.00
Deliverable 3	ACA GO LIVE FOR JUST WATER HEATER	\$ 6,800.00
Deliverable 4	CUSTOM PAYMENT ADAPTER FOR USE WITH CITIZEN ACCESS (ALL )	\$ 20,400.00
Deliverable 5	MOBILE HOME PERMIT	\$ 5,440.00
Deliverable 6	BEST PRACTICE TEMPLATE OVERVIEW TRAINING, ANALYSIS AND SET UP INCLUDES SCRIPTING (LAND)	\$ 29,920.00
Deliverable 7	BEST PRACTICE TEMPLATE OVERVIEW TRAINING, ANALYSIS AND SET UP (LICENSING)	\$ 34,000.00
Deliverable 8	BEST PRACTICE TEMPLATE OVERVIEW TRAINING, ANALYSIS AND SET UP (ASSETS)	\$ 56,950.00
Deliverable 9	STANDARD ADDRESS, PARCEL AND OWNERSHIP (APO) CONVERSION	\$ 6,800.00
Deliverable 10	HISTORICAL DATA CONVERSION ANALYSIS AND DEVELOPMENT (LAND)	\$ 27,200.00
Deliverable 11	HISTORICAL DATA CONVERSION ANALYSIS AND DEVELOPMENT (LICENSING)	\$ 51,000.00
Deliverable 12	HISTORICAL DATA CONVERSION ANALYSIS AND DEVELOPMENT (ASSETS)	\$ 27,200.00
Deliverable 13	ACCELA CITIZEN ACCESS CONFIGURATION (ALL)	\$ 13,600.00
Deliverable 14	SPECIFICATIONS DOCUMENT FOR GAS INTEGRATION WITH PHOENIX 8000	\$ 6,800.00
Deliverable 15	DEVELOP GAS INTEGRATION INTERFACE	\$ 27,030.00
Deliverable 16	CSLB INTERFACE	\$ 1,700.00
Deliverable 17	INTERFACE TO FINANCIAL SYSTEM (BI-DIRECTIONAL)	\$ 17,000.00
Deliverable 18	REPORT SPECIFICATIONS (ALL)	\$ 10,200.00
Deliverable 19	REPORT DEVELOPMENT (ALL)	\$ 13,600.00
Deliverable 20	ACCELA GIS CONFIGURATION (ALL)	\$ 18,360.00
Deliverable 21	ACCELA APPS CONFIGURATION (ALL)	\$ 3,400.00
Deliverable 22	ADMINISTRATIVE AND TECHNICAL TRAINING (ALL)	\$ 12,240.00
Deliverable 23	END USER TRAINING (LAND)	\$ 5,440.00
Deliverable 24	END USER TRAINING (LICENSING)	\$ 5,440.00
Deliverable 25	END USER TRAINING (ASSET)	\$ 5,440.00
Deliverable 26	USER ACCEPTANCE TESTING (UAT) (LAND)	\$ 6,800.00
Deliverable 27	USER ACCEPTANCE TESTING (UAT) (LICENSING)	\$ 27,200.00
Deliverable 28	USER ACCEPTANCE TESTING (UAT) (ASSET)	\$ 10,880.00
Deliverable 29	POST DEPLOYMENT SUPPORT AND TRANSITION TO CRC (LAND, ASSET, LICENSING)	\$ 13,600.00
**	PROJECT MANAGEMENT - 18 MONTHS (LAND, ASSET, LICENSING)	\$ 125,970.00
	<b>TOTAL</b>	<b>\$ 597,210.00</b>

Project Management will be billed monthly @ \$6,988.33 for months 1 through 17 and Month 18 @ \$6,998.39

#### EXPENSES:

Actual amounts of any reasonable and customary travel expenses incurred during the performance of services under this SOW will be billed to Agency, according to Accela expense policy. Accela will bill Customer for actual expenses incurred for travel and lodging/living, as well as



other approved out-of-pocket expenses (such as mileage, parking, tolls and telecommunications charges). Accela will work with Customer to manage and control its expenses in accordance with Accela travel policy guidelines and will not incur expenses in excess of the initial contracted budget below without Customer's prior written consent. Expense receipts will be made available as requested by Agency. Total estimated expenses are based on past engagement experience. Estimated travel for this engagement will not exceed \$64,600.00.

**CONTRACT SUM:**

The total amount payable under this Agreement is therefore \$661,810.00 including travel expenses.



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Acceptance:

Accepted By:

Accela

\_\_\_\_\_  
Authorized Signature

\_\_\_\_\_  
Name - Type or Print

\_\_\_\_\_  
Title

\_\_\_\_\_  
Date

**Appendix A follows**

Accepted By:

Agency of Lancaster, CA

\_\_\_\_\_  
Authorized Signature

\_\_\_\_\_  
Name - Type or Print

\_\_\_\_\_  
Title

\_\_\_\_\_  
Date



## APPENDIX A – DATA CONVERSION ASSUMPTIONS

The following information provides detail related to the scope of the data conversion offerings. Due to the inherent complexity of conversion activities, it is critical to address and understand common questions and misconceptions. Any conversion activity or requirement not included in this section is considered out of scope, and may be addressed through a change order for services.

### GENERAL INFORMATION AND REQUIREMENTS FOR HISTORICAL CONVERSIONS

- The proposed data conversion includes the conversion of transactional data to the Accela Automation database when a configured destination exists. In the event there is no destination for legacy transactional data then it will be required to be converted as best fits into another area of the configuration or excluded from the conversion effort.
- Accela will perform unit testing of the conversion program including spot checks of the data within Accela Automation in order to identify if data corruption issues exist. Extensive quality assurance of legacy/historical data by the agency is required in order to ensure accurate transfer of data.
- A completed, signed off, Solution Foundation must be available before Accela will begin the data conversion mapping effort.

### DATA CONVERSION ASSUMPTIONS

- **“As-Is” Approach:** Conversion of transactional tables, Address/Parcel/Owner (APO) data, Professional License data is executed “As-is” into Accela Automation. “As-is” means that the data will be transformed as mapped to existing configuration elements in Accela Automation. The conversion process will not create configuration data or alter the mapped data when processed into Accela Automation. Additionally this means if invalid, inaccurate, or incomplete data is provided, it will be loaded into Accela Automation “As-is”. All data cleanup must occur prior to execution into Accela Automation.
- **Accela Data Conversion Tools:** Data will be mapped and converted utilizing Accela’s Extract Translate and Load (“ETL”) toolset. This will assist to ensure the accuracy of the mapping. The data mapping tool ensures that the legacy source to Accela Automation solution is accurate and prevents data from failing to convert, while the execution tool can be used to consistently run conversion process and track statistics.
- **Acceptable Data Formats For Historical Conversion:** It is expected that the Conversion Source Data be provided in an Oracle 10g/11g or Microsoft SQL Server 2000/2005/2008 database format. In the event that the source is not in an acceptable format, Accela will provide recommendations for transposing the data in the proper format.
- **Documents:** Historical/Legacy data conversion includes the conversion of attached documents into Accela Document Services (“ADS”) in Accela Automation, provided the Agency provides the documents in the structure Accela requires. The documents will be converted to the configured primary electronic document management system (EDMS). See [Standard Document Migration](#) for additional details.

### STANDARD DOCUMENT MIGRATION

The standard document conversion may be utilized to convert record/permit level attached electronic documents into the configured Accela Automation EDMS systems. In the event a 3<sup>rd</sup> party EDMS is used by Accela Automation, it is still possible to convert documents if the 3<sup>rd</sup> party interface supports the create method.

At a minimum the electronic document(s) to be converted must exist in a Microsoft Windows accessible file system (ex. NTFS, FAT32) and have the ability to identify the associated Record ID in order to be converted. In the event that the files exist in a database they must be extracted into a windows file system prior to be evaluated for conversion.

## APPENDIX B – ACCELA BPT TEMPLATES RECORD LIST V5

### Land Management



### Permitting and Inspections

Commercial Addition	Commercial Re-Roof	Residential Plumbing	Residential Pool-Spa
Commercial Alteration	Residential Addition	Residential Re-Roof	Temporary Sign
Commercial Demolition	Residential Alteration	Multi-Family Addition	Permanent Sign
Commercial New	Residential Demolition	Multi-Family Alteration	Grading
Commercial Electrical	Residential New	Multi-Family Demolition	Fence Permit
Commercial Mechanical	Residential Electrical	Multi-Family New	Solar Permit
Commercial Plumbing	Residential Mechanical	Commercial Pool-Spa	

### Planning and Zoning

Subdivision	Design Review	Pre-Application Meeting	Annexation
Preliminary Map	Variance	Appeal	General Plan Update
Final Map	Rezoning	Time Extension	Specific Plan
Planned Unit Development	Plan Amendment	Modification to Prior Approval	Zoning Text Amendment
Conditional Use	Home Occupation Permit	Confirmation Letter	Lot Line Adjustment
Revocable Permit	Site Plan – Major	Site Plan – Minor	Final Plat
Subdivision – Major	Subdivision - Minor	Preliminary Plat	

### Code Enforcement

Illegal Sign Violation	Abandoned Vehicle Violation	Working W/O Permit Violation	Home Occupation Violation
Animal Violation	Overgrown Weeds Violation	Garbage Service	Tree Violation
Graffiti Removal	Grading Violation	Junk on Property Violation	Sub-Standard Property Violation
Noise Nuisance	Illegal Occupancy Violation	Vacant Building Violation	Fence Violation

### Licensing

#### Local Licensing

Retail License with application and renewal	Amusement License with application and renewal	Home Occupation License with application and renewal	Dog License with application and renewal
Restaurant License with application and renewal	Entertainment License with application and renewal	General Contractor License with application and renewal	Garage –Yard Sale License
Nightclub-Bar License with application and renewal	Service License with application and renewal	Electrical Contractor License with application and renewal	
Wholesaler License with application and renewal	Hotel-Motel-Lodging License with application and renewal	Mechanical Contractor License with application and renewal	
Manufacturer License with application and renewal	Vehicle for Hire License with application and renewal	Plumbing Contractor License with application and renewal	
Professional License with application and renewal	Street Vendor License with application and renewal	Special Event Licenser License with application	

# Statement of Work

## Asset Management

### Electric

Pole	Power Line	Repeater	
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### Facilities

Building	Complex	Property	
Camera	Plant Equipment	Shelter	

### Fleet

Equipment	Vehicle		
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### Parks

Land Area	Landscape	Park	
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### Sewer

Culvert	Backflow Preventer	Node	Wastewater Treatment Plant
Curb and Gutter	Main	Pump	
Inlet	Manhole	Service Line	
Lift Station	Meter	Valve	

### Storm

Backflow Preventer	Lift Station	Node	Storage Basin
Channel	Main	Pump	
Levee	Manhole	Service Line	

### Street

Bridge	ITS	Segment	Substation
Curb and Gutter	Sidewalk	Sign	Support
Intersection	Light	Signal	Tree

### Water

Fluid Storage Unit	Manhole	Pump Station	Valve
Hydrant	Meter	Service Line	
Backflow Preventer	Node	Storage Unit	
Main	Pump	Treatment Plant	

## Service Request

Abandoned Vehicle	Graffiti	Leaking Fire Hydrant	Sub-Standard Property
Animal Nuisance	Home Occupation	Pothole	Tall Grass and Weeds
Excessive Noise	Illegal Occupancy	Snow Removal	Trash Removal
Fence Dispute	Illegal Sign	Street Flooding	Tree Maintenance
Grading Complaint	Junk on Property	Street Light	Vacant Building
Working Without Permit			

## APPENDIX C – STANDARD ACCELA ADAPTERS

### Adapters

Adapter Name
Virtual Merchant
Official Payments STP
Official Payments CoBrand
Govolution

# Statement of Work

## APPENDIX D – DELIVERABLE TIME LINE

PROJECT ACCELA LAND LICENSE ASSET	Jan	Feb	March	April	May	June	July	Aug	Sep	Oct	Nov	Dec	Jan	Feb	March	April	May	June	July	Aug	
	1 PROJECT INITIATION	1																			
2 ACCELA AUTOMATION SETUP	2																				
3 ACA GO LIVE FOR JUST WATER HEATER	3																				
4 CUSTOM PAYMENT ADAPTER FOR USE WITH CITIZEN ACCESS (ALL)		4																			
5 MOBILE HOME PERMIT			5																		
6 BPT ANALYSIS AND SETUP (LAND)			6	6																	
7 BPT ANALYSIS AND SETUP (LICENSING)							7	7	7												
8 BPT ANALYSIS AND SETUP (ASSETS)												8	8	8							
9 STANDARD ADDRESS PARCEL/LAND OWNERSHIP (APO) CONVERSION					9																
10 HISTORICAL DATA CONVERSION (LAND)						10	10														
11 HISTORICAL DATA CONVERSION (LICENSING)											11	11									
12 HISTORICAL DATA CONVERSION (ASSETS)															12	12					
13 ACCELA CITIZEN ACCESS CONFIGURATION																					
14 SPECIFICATIONS DOCUMENT FOR GAS INTEGRATION WITH PHOENIX BDD									14												
15 DEVELOP GAS INTEGRATION INTERFACE										15											
16 CSLB INTERFACE						16															
17 INTERFACE TO FINANCIAL SYSTEM (BI-DIRECTIONAL)						17															
18 DELIVERABLE 18 REPORT SPECIFICATIONS											18										
19 REPORT DEVELOPMENT												19									
20 ACCELA GIS CONFIGURATION																					
21 ACCELA APPS CONFIGURATION																					
22 ADMINISTRATIVE AND TECHNICAL TRAINING																					
23 END USER TRAINING (LAND)							23														
24 END USER TRAINING (LICENSING)												24									
25 END USER TRAINING (ASSET)																					
26 USER ACCEPTANCE TESTING (UAT) (LAND)										26	26	26									
27 USER ACCEPTANCE TESTING (UAT) (LICENSING)													27	27	27						
28 USER ACCEPTANCE TESTING (UAT) (ASSET)																					
29 POST DEPLOYMENT SUPPORT AND TRANSITION TO CRC (LAND, ASSET, LICENSING)																					29
30 PROJECT MANAGEMENT - 18 MONTHS (LAND, ASSET, LICENSING)																					