# GOVERNMENT - PRICE QUOTATION

## ACCELA GOVERNMENT AT CARAHSOFT

**Accela**  **carahsoft.**

11493 SUNSET HILLS ROAD | SUITE 100 | RESTON, VIRGINIA 20190
PHONE (703) 871-8500 | FAX (703) 871-8505 | TOLL FREE (888) 66CARAH
WWW.CARAHSOFT.COM

| | | | |
|---|---|---|---|
| **TO:** | Lissette Dominguez<br>City of Hollywood - Public Utilities Department<br>2600 Hollywood Blvd<br>P.O. Box 229045<br>Hollywood, FL 33020 USA | **FROM:** | Jazmine Fitts<br>Carahsoft Technology Corp.<br>11493 Sunset Hills Road<br>Reston, Virginia 20190 |
| **EMAIL:** | LDOMINGUEZ@hollywoodfl.org | **EMAIL:** | Jazmine.Fitts@carahsoft.com |
| **PHONE:** | | **PHONE:** (571) 662-3147   **FAX:** | |

**TERMS:**
GSA Schedule No: 47QSWA18D008F
Term: August 22, 2018 - August 21, 2028
FTIN: 52-2189693
Shipping Point: FOB Destination
Credit Cards: VISA/MasterCard/AMEX
Remit To: Same as Above
Payment Terms: Net 30 (On Approved Credit)
Cage Code: 1P3C5
DUNS No: 088365767
UEI: DT8KJHZXVJH5
Business Size: Other than Small
Sales Tax May Apply

| | |
|---|---|
| **QUOTE NO:** | 42048342 |
| **QUOTE DATE:** | 11/28/2023 |
| **QUOTE EXPIRES:** | 12/28/2023 |
| **RFQ NO:** | |
| **SHIPPING:** | ESD |
| **TOTAL PRICE:** | $5,901,702.70 |
| **TOTAL QUOTE:** | $5,901,702.70 |

| LINE NO. | PART NO. | DESCRIPTION | - | QUOTE PRICE | | QTY | EXTENDED PRICE |
|---|---|---|---|---|---|---|---|
| | | **YEAR 1 ACCELA AND EPERMITHUB SAAS** | | | | | |
| 1 | SS21000MU305I-611 | Multi-Solution - Accela Annual<br>Accela building and planning - Year 1<br>Accela Inc - SS21000MU305I<br>Start Date: 12/08/2023<br>End Date: 12/07/2024 | | $2,101.82 | GSA | 200 | $420,364.00 |
| 2 | AS00DAC305I-611 | Accela Enhanced Reporting Database Annual<br>Year 1<br>Accela Inc - AS00DAC305I | | $252.22 | GSA | 200 | $50,444.00 |
| 3 | DIGPLANROOM-SIM | ePermitHub Digital Plan Room Software Subscription -<br>Simple<br>Year 1<br>PermitRocket Software LLC - DIGPLANROOM-SIM | | $7.27 | OM | 10500 | $76,335.00 |
| 4 | DIGPLANROOM-ITER | ePermitHub Digital Plan Room Software Subscription -<br>Iterative<br>Year 1<br>PermitRocket Software LLC - DIGPLANROOM-ITER | | $24.94 | OM | 3500 | $87,290.00 |
| | | **YEAR 1 ACCELA AND EPERMITHUB SAAS SUBTOTAL:** | | | | | $634,433.00 |
| | | **YEAR 2 ACCELA AND EPERMITHUB SAAS** | | | | | |
| 5 | SS21000MU305I-611 | Multi-Solution - Accela Annual<br>Accela building and planning - Year 2<br>Accela Inc - SS21000MU305I<br>Start Date: 12/08/2024<br>End Date: 12/07/2025 | | $2,206.91 | GSA | 200 | $441,382.00 |
| 6 | AS00DAC305I-611 | Accela Enhanced Reporting Database Annual<br>Year 2<br>Accela Inc - AS00DAC305I | | $264.82 | GSA | 200 | $52,964.00 |
| 7 | DIGPLANROOM-SIM-1 | ePermitHub Digital Plan Room Software Subscription -<br>Simple<br>Year 2<br>PermitRocket Software LLC - DIGPLANROOM-SIM-1 | | $7.64 | OM | 10500 | $80,220.00 |

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| LINE NO. | PART NO. | DESCRIPTION | - | QUOTE PRICE | | QTY | EXTENDED PRICE |
|---|---|---|---|---|---|---|---|
| 8 | DIGPLANROOM-ITER-1 | ePermitHub Digital Plan Room Software Subscription - Iterative<br>Year 2<br>PermitRocket Software LLC - DIGPLANROOM-ITER-1 | | $26.18 | OM | 3500 | $91,630.00 |
| | | **YEAR 2 ACCELA AND EPERMITHUB SAAS SUBTOTAL:** | | | | | **$666,196.00** |
| | | **YEAR 3 ACCELA AND EPERMITHUB SAAS** | | | | | |
| 9 | SS21000MU305I-611 | Multi-Solution - Accela Annual<br>Accela buliding and planning - Year 3<br>Accela Inc - SS21000MU305I<br>Start Date: 12/08/2025<br>End Date: 12/07/2026 | | $2,317.26 | GSA | 200 | $463,452.00 |
| 10 | AS00DAC305I-611 | Accela Enhanced Reporting Database Annual<br>Year 3<br>Accela Inc - AS00DAC305I | | $278.07 | GSA | 200 | $55,614.00 |
| 11 | DIGPLANROOM-SIM-2 | ePermitHub Digital Plan Room Software Subscription - Simple<br>Year 3<br>PermitRocket Software LLC - DIGPLANROOM-SIM-2 | | $8.02 | OM | 10500 | $84,210.00 |
| 12 | DIGPLANROOM-ITER-2 | ePermitHub Digital Plan Room Software Subscription - Iterative<br>Year 3<br>PermitRocket Software LLC - DIGPLANROOM-ITER-2 | | $27.49 | OM | 3500 | $96,215.00 |
| | | **YEAR 3 ACCELA AND EPERMITHUB SAAS SUBTOTAL:** | | | | | **$699,491.00** |
| | | **YEAR 4 ACCELA AND EPERMITHUB SAAS** | | | | | |
| 14 | SS21000MU305I-611 | Multi-Solution - Accela Annual<br>Accela building and planning - Year 4<br>Accela Inc - SS21000MU305I<br>Start Date: 12/08/2026<br>End Date: 12/07/2027 | | $2,433.12 | GSA | 200 | $486,624.00 |
| 15 | AS00DAC305I-611 | Accela Enhanced Reporting Database Annual<br>Year 4<br>Accela Inc - AS00DAC305I | | $291.97 | GSA | 200 | $58,394.00 |
| 16 | DIGPLANROOM-SIM-3 | ePermitHub Digital Plan Room Software Subscription - Simple<br>Year 4<br>PermitRocket Software LLC - DIGPLANROOM-SIM-3 | | $8.42 | OM | 10500 | $88,410.00 |
| 17 | DIGPLANROOM-ITER-3 | ePermitHub Digital Plan Room Software Subscription - Iterative<br>Year 4<br>PermitRocket Software LLC - DIGPLANROOM-ITER-3 | | $28.86 | OM | 3500 | $101,010.00 |
| | | **YEAR 4 ACCELA AND EPERMITHUB SAAS SUBTOTAL:** | | | | | **$734,438.00** |
| | | **YEAR 5 ACCELA AND EPERMITHUB SAAS** | | | | | |
| 19 | SS21000MU305I-611 | Multi-Solution - Accela Annual<br>Accela building and planning - Year 5<br>Accela Inc - SS21000MU305I<br>Start Date: 12/08/2027<br>End Date: 12/07/2028 | | $2,554.77 | GSA | 200 | $510,954.00 |
| 20 | DIGPLANROOM-SIM-4 | ePermitHub Digital Plan Room Software Subscription - Simple<br>Year 5<br>PermitRocket Software LLC - DIGPLANROOM-SIM-4 | | $8.83 | OM | 10500 | $92,715.00 |
| 21 | AS00DAC305I-611 | Accela Enhanced Reporting Database Annual<br>Year 5<br>Accela Inc - AS00DAC305I | | $306.57 | GSA | 200 | $61,314.00 |

QUOTE DATE: 11/28/2023
QUOTE NO: 42048342

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## ACCELA GOVERNMENT AT CARAHSOFT

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|---|---|---|---|---|---|---|---|
| 22 | DIGPLANROOM-ITER-4 | ePermitHub Digital Plan Room Software Subscription - Iterative<br>Year 5<br>PermitRocket Software LLC - DIGPLANROOM-ITER-4 | | $30.31 | OM | 3500 | $106,085.00 |
| | | **YEAR 5 ACCELA AND EPERMITHUB SAAS SUBTOTAL:** | | | | | $771,068.00 |
| | | **ACCELA SERVICES** | | | | | |
| 24 | CON-SIA-611 | Senior Information Architect (Per Hour)<br>Project Startup<br>Carahsoft Technology Corporation - CON-SIA | | $259.74 | GSA | 200 | $51,948.00 |
| 25 | CON-SIA-611 | Senior Information Architect (Per Hour)<br>Solution Provisioning<br>Carahsoft Technology Corporation - CON-SIA | | $259.74 | GSA | 200 | $51,948.00 |
| 26 | CON-SIA-611 | Senior Information Architect (Per Hour)<br>Core Team Training<br>Carahsoft Technology Corporation - CON-SIA | | $259.74 | GSA | 120 | $31,168.80 |
| 27 | CON-SIA-611 | Senior Information Architect (Per Hour)<br>Tailoring Sessions Group 1 PHASE 1<br>Carahsoft Technology Corporation - CON-SIA | | $259.74 | GSA | 151.4387 | $39,334.69 |
| 28 | CON-SIA-611 | Senior Information Architect (Per Hour)<br>Tailoring Sessions Group 2 PHASE 1<br>Carahsoft Technology Corporation - CON-SIA | | $259.74 | GSA | 151.4387 | $39,334.69 |
| 29 | CON-SIA-611 | Senior Information Architect (Per Hour)<br>Tailoring Sessions Group 3 PHASE 2<br>Carahsoft Technology Corporation - CON-SIA | | $259.74 | GSA | 151.4387 | $39,334.69 |
| 30 | CON-SIA-611 | Senior Information Architect (Per Hour)<br>Tailoring Sessions Group 4 PHASE 2<br>Carahsoft Technology Corporation - CON-SIA | | $259.74 | GSA | 151.4387 | $39,334.69 |
| 31 | CON-SIA-611 | Senior Information Architect (Per Hour)<br>Tailoring Sessions Group 5 PHASE 2<br>Carahsoft Technology Corporation - CON-SIA | | $259.74 | GSA | 151.4387 | $39,334.69 |
| 32 | CON-SIA-611 | Senior Information Architect (Per Hour)<br>Tailoring Sessions Group 6 PHASE 2<br>Carahsoft Technology Corporation - CON-SIA | | $259.74 | GSA | 151.4387 | $39,334.69 |
| 33 | CON-SIA-611 | Senior Information Architect (Per Hour)<br>Tailoring Sessions Group 7 PHASE 2<br>Carahsoft Technology Corporation - CON-SIA | | $259.74 | GSA | 151.4387 | $39,334.69 |
| 34 | CON-SIA-611 | Senior Information Architect (Per Hour)<br>Tailoring Sessions Group 8 PHASE 2<br>Carahsoft Technology Corporation - CON-SIA | | $259.74 | GSA | 151.4387 | $39,334.69 |
| 35 | CON-SIA-611 | Senior Information Architect (Per Hour)<br>Tailoring Sessions Group 9 PHASE 2<br>Carahsoft Technology Corporation - CON-SIA | | $259.74 | GSA | 151.4387 | $39,334.69 |
| 36 | CON-SIA-611 | Senior Information Architect (Per Hour)<br>Tailoring Sessions Group 10 PHASE 2<br>Carahsoft Technology Corporation - CON-SIA | | $259.74 | GSA | 151.4387 | $39,334.69 |
| 37 | CON-SIA-611 | Senior Information Architect (Per Hour)<br>Tailoring Sessions Group 11 PHASE 2<br>Carahsoft Technology Corporation - CON-SIA | | $259.74 | GSA | 151.4387 | $39,334.69 |
| 38 | CON-SIA-611 | Senior Information Architect (Per Hour)<br>Tailoring Sessions Group 12 PHASE 2<br>Carahsoft Technology Corporation - CON-SIA | | $259.74 | GSA | 151.4387 | $39,334.69 |
| 39 | CON-SIA-611 | Senior Information Architect (Per Hour)<br>Refine Stage Conference Room Checkpoints Group 1 PHASE 1<br>Carahsoft Technology Corporation - CON-SIA | | $259.74 | GSA | 151.4387 | $39,334.69 |
| 40 | CON-SIA-611 | Senior Information Architect (Per Hour)<br>Refine Stage Conference Room Checkpoints Group 2 PHASE 1<br>Carahsoft Technology Corporation - CON-SIA | | $259.74 | GSA | 151.4387 | $39,334.69 |

**QUOTE DATE:** 11/28/2023
**QUOTE NO:** 42048342

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| LINE NO. | PART NO. | DESCRIPTION | - | QUOTE PRICE | | QTY | EXTENDED PRICE |
|---|---|---|---|---|---|---|---|
| 41 | CON-SIA-611 | Senior Information Architect (Per Hour) Refine Stage Conference Room Checkpoints Group 3 PHASE 2 Carahsoft Technology Corporation - CON-SIA | | $259.74 | GSA | 151.4387 | $39,334.69 |
| 42 | CON-SIA-611 | Senior Information Architect (Per Hour) Refine Stage Conference Room Checkpoints Group 4 PHASE 2 Carahsoft Technology Corporation - CON-SIA | | $259.74 | GSA | 151.4387 | $39,334.69 |
| 43 | CON-SIA-611 | Senior Information Architect (Per Hour) Refine Stage Conference Room Checkpoints Group 5 PHASE 2 Carahsoft Technology Corporation - CON-SIA | | $259.74 | GSA | 151.4387 | $39,334.69 |
| 44 | CON-SIA-611 | Senior Information Architect (Per Hour) Refine Stage Conference Room Checkpoints Group 6 PHASE 2 Carahsoft Technology Corporation - CON-SIA | | $259.74 | GSA | 151.4387 | $39,334.69 |
| 45 | CON-SIA-611 | Senior Information Architect (Per Hour) Refine Stage Conference Room Checkpoints Group 7 PHASE 2 Carahsoft Technology Corporation - CON-SIA | | $259.74 | GSA | 151.4387 | $39,334.69 |
| 46 | CON-SIA-611 | Senior Information Architect (Per Hour) Refine Stage Conference Room Checkpoints Group 8 PHASE 2 Carahsoft Technology Corporation - CON-SIA | | $259.74 | GSA | 151.4387 | $39,334.69 |
| 47 | CON-SIA-611 | Senior Information Architect (Per Hour) Refine Stage Conference Room Checkpoints Group 9 PHASE 2 Carahsoft Technology Corporation - CON-SIA | | $259.74 | GSA | 151.4387 | $39,334.69 |
| 48 | CON-SIA-611 | Senior Information Architect (Per Hour) Refine Stage Conference Room Checkpoints Group 10 PHASE 2 Carahsoft Technology Corporation - CON-SIA | | $259.74 | GSA | 151.4387 | $39,334.69 |
| 49 | CON-SIA-611 | Senior Information Architect (Per Hour) Refine Stage Conference Room Checkpoints Group 11 PHASE 2 Carahsoft Technology Corporation - CON-SIA | | $259.74 | GSA | 151.4387 | $39,334.69 |
| 50 | CON-SIA-611 | Senior Information Architect (Per Hour) Refine Stage Conference Room Checkpoints Group 12 PHASE 2 Carahsoft Technology Corporation - CON-SIA | | $259.74 | GSA | 151.4387 | $39,334.69 |
| 51 | CON-SIA-611 | Senior Information Architect (Per Hour) Report Specifications PHASE 1* Carahsoft Technology Corporation - CON-SIA | | $259.74 | GSA | 151.4387 | $39,334.69 |
| 52 | CON-SIA-611 | Senior Information Architect (Per Hour) Report Specifications PHASE 2* Carahsoft Technology Corporation - CON-SIA | | $259.74 | GSA | 151.4387 | $39,334.69 |
| 53 | CON-SIA-611 | Senior Information Architect (Per Hour) Report Specifications PHASE 2* Carahsoft Technology Corporation - CON-SIA | | $259.74 | GSA | 151.4387 | $39,334.69 |
| 54 | CON-SIA-611 | Senior Information Architect (Per Hour) Integration Specifications for PHASE 1* Carahsoft Technology Corporation - CON-SIA | | $259.74 | GSA | 151.4387 | $39,334.69 |
| 55 | CON-SIA-611 | Senior Information Architect (Per Hour) Integration Specification for PHASE 2* Carahsoft Technology Corporation - CON-SIA | | $259.74 | GSA | 151.4387 | $39,334.69 |
| 56 | CON-SIA-611 | Senior Information Architect (Per Hour) Data Conversion Kickoff and Training Carahsoft Technology Corporation - CON-SIA | | $259.74 | GSA | 60 | $15,584.40 |
| 57 | CON-SIA-611 | Senior Information Architect (Per Hour) Data Conversion Mock Run 1 Carahsoft Technology Corporation - CON-SIA | | $259.74 | GSA | 100 | $25,974.00 |

QUOTE DATE: 11/28/2023
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| LINE NO. | PART NO. | DESCRIPTION | - | QUOTE PRICE | | QTY | EXTENDED PRICE |
|---|---|---|---|---|---|---|---|
| 58 | CON-SIA-611 | Senior Information Architect (Per Hour) Data Conversion Mock Run 2 Carahsoft Technology Corporation - CON-SIA | | $259.74 | GSA | 100 | $25,974.00 |
| 59 | CON-SIA-611 | Senior Information Architect (Per Hour) Data Conversion Mock Run 3 Carahsoft Technology Corporation - CON-SIA | | $259.74 | GSA | 100 | $25,974.00 |
| 60 | CON-SIA-611 | Senior Information Architect (Per Hour) Develop Stage Conference Room Checkpoints for Group 1 PHASE 1 Carahsoft Technology Corporation - CON-SIA | | $259.74 | GSA | 195.7372 | $50,840.78 |
| 61 | CON-SIA-611 | Senior Information Architect (Per Hour) Develop Stage Conference Room Checkpoints Group 2 PHASE 1 Carahsoft Technology Corporation - CON-SIA | | $259.74 | GSA | 195.7372 | $50,840.78 |
| 62 | CON-SIA-611 | Senior Information Architect (Per Hour) Develop Stage Conference Room Checkpoints Group 3 PHASE 2 Carahsoft Technology Corporation - CON-SIA | | $259.74 | GSA | 195.7372 | $50,840.78 |
| 63 | CON-SIA-611 | Senior Information Architect (Per Hour) Develop Stage Conference Room Checkpoints Group 4 PHASE 2 Carahsoft Technology Corporation - CON-SIA | | $259.74 | GSA | 195.7372 | $50,840.78 |
| 64 | CON-SIA-611 | Senior Information Architect (Per Hour) Develop Stage Conference Room Checkpoints Group 5 PHASE 2 Carahsoft Technology Corporation - CON-SIA | | $259.74 | GSA | 195.7372 | $50,840.78 |
| 65 | CON-SIA-611 | Senior Information Architect (Per Hour) Develop Stage Conference Room Checkpoints Group 6 PHASE 2 Carahsoft Technology Corporation - CON-SIA | | $259.74 | GSA | 195.7372 | $50,840.78 |
| 66 | CON-SIA-611 | Senior Information Architect (Per Hour) Develop Stage Conference Room Checkpoints Group 7 PHASE 2 Carahsoft Technology Corporation - CON-SIA | | $259.74 | GSA | 195.7372 | $50,840.78 |
| 67 | CON-SIA-611 | Senior Information Architect (Per Hour) Develop Stage Conference Room Checkpoints Group 8 PHASE 2 Carahsoft Technology Corporation - CON-SIA | | $259.74 | GSA | 195.7372 | $50,840.78 |
| 68 | CON-SIA-611 | Senior Information Architect (Per Hour) Develop Stage Conference Room Checkpoints Group 9 PHASE 2 Carahsoft Technology Corporation - CON-SIA | | $259.74 | GSA | 195.7372 | $50,840.78 |
| 69 | CON-SIA-611 | Senior Information Architect (Per Hour) Develop Stage Conference Room Checkpoints Group 10 PHASE 2 Carahsoft Technology Corporation - CON-SIA | | $259.74 | GSA | 195.7372 | $50,840.78 |
| 70 | CON-SIA-611 | Senior Information Architect (Per Hour) Develop Stage Conference Room Checkpoints Group 11 PHASE 2 Carahsoft Technology Corporation - CON-SIA | | $259.74 | GSA | 195.7372 | $50,840.78 |
| 71 | CON-SIA-611 | Senior Information Architect (Per Hour) Develop Stage Conference Room Checkpoints Group 12 PHASE 2 Carahsoft Technology Corporation - CON-SIA | | $259.74 | GSA | 195.7372 | $50,840.78 |
| 72 | CON-SIA-611 | Senior Information Architect (Per Hour) Testing Plan* Carahsoft Technology Corporation - CON-SIA | | $259.74 | GSA | 80 | $20,779.20 |
| 73 | CON-SIA-611 | Senior Information Architect (Per Hour) Training Plan* Carahsoft Technology Corporation - CON-SIA | | $259.74 | GSA | 80 | $20,779.20 |

| | |
|---|---|
| **QUOTE DATE:** | 11/28/2023 |
| **QUOTE NO:** | 42048342 |

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| LINE NO. | PART NO. | DESCRIPTION | - | QUOTE PRICE | | QTY | EXTENDED PRICE |
|---|---|---|---|---|---|---|---|
| 74 | CON-SIA-611 | Senior Information Architect (Per Hour) UAT Remediation and Remediation Testing Support PHASE 1 Carahsoft Technology Corporation - CON-SIA | | $259.74 | GSA | 60 | $15,584.40 |
| 75 | CON-SIA-611 | Senior Information Architect (Per Hour) UAT Remediation and Remediation Testing Support PHASE 2 Carahsoft Technology Corporation - CON-SIA | | $259.74 | GSA | 151.4387 | $39,334.69 |
| 76 | CON-SIA-611 | Senior Information Architect (Per Hour) Train the Trainer PHASE 1 Carahsoft Technology Corporation - CON-SIA | | $259.74 | GSA | 40 | $10,389.60 |
| 77 | CON-SIA-611 | Senior Information Architect (Per Hour) Train the Trainer Phase 2 Carahsoft Technology Corporation - CON-SIA | | $259.74 | GSA | 80 | $20,779.20 |
| 78 | CON-SIA-611 | Senior Information Architect (Per Hour) Production Go Live Phase 1 Carahsoft Technology Corporation - CON-SIA | | $259.74 | GSA | 160 | $41,558.40 |
| 79 | CON-SIA-611 | Senior Information Architect (Per Hour) Production Go Live PHASE 2 Carahsoft Technology Corporation - CON-SIA | | $259.74 | GSA | 160 | $41,558.40 |
| 80 | CON-SIA-611 | Senior Information Architect (Per Hour) Transition to Customer Support Carahsoft Technology Corporation - CON-SIA | | $259.74 | GSA | 200 | $51,948.00 |
| 81 | T&E | Travel expenses Carahsoft Technology Corporation - T&E | | $2,500.00 | OM | 16 | $40,000.00 |
| | | **ACCELA SERVICES SUBTOTAL:** | | | | | $2,282,077.66 |
| | | **EPERMITHUB SERVICES** | | | | | |
| 82 | CON-SIA-611 | Senior Information Architect (Per Hour) Phase 1A- Project Kick-Off & Inition Carahsoft Technology Corporation - CON-SIA | | $206.52 | GSA | 12 | $2,478.24 |
| 83 | CON-SIA-611 | Senior Information Architect (Per Hour) Phase 1A- Digital Plan Room Installation/Provisioning Carahsoft Technology Corporation - CON-SIA | | $206.52 | GSA | 20 | $4,130.40 |
| 84 | CON-SIA-611 | Senior Information Architect (Per Hour) Phase 1A Digital Plan Room Configuration Analysis Carahsoft Technology Corporation - CON-SIA | | $206.52 | GSA | 40 | $8,260.80 |
| 85 | CON-SIA-611 | Senior Information Architect (Per Hour) Phase 1A Digital Plan Room Configuration Carahsoft Technology Corporation - CON-SIA | | $206.52 | GSA | 40 | $8,260.80 |
| 86 | CON-SIA-611 | Senior Information Architect (Per Hour) Phase 1B User Acceptance Testing (UAT) Carahsoft Technology Corporation - CON-SIA | | $206.52 | GSA | 40 | $8,260.80 |
| 87 | CON-SIA-611 | Senior Information Architect (Per Hour) Phase 1B Administrative and Technical Training Carahsoft Technology Corporation - CON-SIA | | $206.52 | GSA | 10 | $2,065.20 |
| 88 | CON-SIA-611 | Senior Information Architect (Per Hour) Phase 1B End User Training Carahsoft Technology Corporation - CON-SIA | | $206.52 | GSA | 20 | $4,130.40 |
| 89 | CON-SIA-611 | Senior Information Architect (Per Hour) Phase 1B Agency Customer Enablement Carahsoft Technology Corporation - CON-SIA | | $206.52 | GSA | 20 | $4,130.40 |
| 90 | CON-SIA-611 | Senior Information Architect (Per Hour) Phase 1B Production Planning & Go-Live Migration Carahsoft Technology Corporation - CON-SIA | | $206.52 | GSA | 20 | $4,130.40 |
| 91 | CON-SIA-611 | Senior Information Architect (Per Hour) Phase 1B Post Go-Live Support Carahsoft Technology Corporation - CON-SIA | | $206.52 | GSA | 40 | $8,260.80 |
| 92 | CON-SIA-611 | Senior Information Architect (Per Hour) Phase 2A Digital Plan Room Configuration Analysis Carahsoft Technology Corporation - CON-SIA | | $206.52 | GSA | 70 | $14,456.40 |

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| LINE NO. | PART NO. | DESCRIPTION | - | QUOTE PRICE | | QTY | EXTENDED PRICE |
|---|---|---|---|---|---|---|---|
| 93 | CON-SIA-611 | Senior Information Architect (Per Hour) Phase 2A Digital Plan Room Configuration Carahsoft Technology Corporation - CON-SIA | | $206.52 | GSA | 70 | $14,456.40 |
| 94 | CON-SIA-611 | Senior Information Architect (Per Hour) Phase 2B User Acceptance Testing (UAT) Carahsoft Technology Corporation - CON-SIA | | $206.52 | GSA | 40 | $8,260.80 |
| 95 | CON-SIA-611 | Senior Information Architect (Per Hour) Phase 2B End User Training Carahsoft Technology Corporation - CON-SIA | | $206.52 | GSA | 20 | $4,130.40 |
| 96 | CON-SIA-611 | Senior Information Architect (Per Hour) Phase 2B Agency Customer Enablement Carahsoft Technology Corporation - CON-SIA | | $206.52 | GSA | 10 | $2,065.20 |
| 97 | CON-SIA-611 | Senior Information Architect (Per Hour) Phase 2B Production Planning & Go-Live Migration Carahsoft Technology Corporation - CON-SIA | | $206.52 | GSA | 20 | $4,130.40 |
| 98 | CON-SIA-611 | Senior Information Architect (Per Hour) Phase 2B Post Go-Live Support Carahsoft Technology Corporation - CON-SIA | | $206.52 | GSA | 60 | $12,391.20 |
| | | **EPERMITHUB SERVICES SUBTOTAL:** | | | | | $113,999.04 |
| | | **SUBTOTAL:** | | | | | $5,901,702.70 |
| | | **TOTAL PRICE:** | | | | | **$5,901,702.70** |
| | | **TOTAL QUOTE:** | | | | | **$5,901,702.70** |

# Statement of Work

## Hollywood, FL

11/19/2023

Version 2.0

Accela, Inc.
2633 Camino Ramon
Suite 120
San Ramon, CA  94583
Tel:  925-659-3200

Carahsoft Technology Corp.
11493 Sunset Hills Rd
Suite 100
Reston, VA 20190
Tel: 571-662-3010

# TABLE OF CONTENTS

Proprietary and Confidential

## DOCUMENT CONTROL

| Date | Author | Version | Change Reference |
|------|--------|---------|------------------|
| 10/16/23 | J. Fleming | 1.0 | Initial draft |
| 11/192023 | E Strang | 2.0 | Updated based on feedback from customer |
|  |  |  |  |

# INTRODUCTION

This Statement of Work ("SOW") dated as of the last date of signature below sets forth the scope and definition of the project-based professional services (collectively, the "Services") to be provided by Carahsoft Technology Corp. ("Carahsoft") and Accela, Inc. to Hollywood, FL ("Agency" or "Customer").

This SOW is governed by the Accela Consulting Services Policy found at [www.accela.com/terms](www.accela.com/terms).

Notwithstanding anything to the contrary, Accela is not assigning or licensing any intellectual property to the Customer under this SOW.

# EXECUTIVE SUMMARY

This document captures the configurations Hollywood, FL, will receive and provides visibility into how Accela will perform the implementation of your solution.

# SOLUTION OVERVIEW

Your solution includes the following SaaS products:
- Civic Applications
  - Building
  - Planning
  - Engineering
- Accela Citizen Access (ACA) Public Portal
- Accela Mobile
- Accela GIS
- Construct API

Integrations are implemented by leveraging Accela's Construct API and standard adapters. This implementation includes the following integrations by phase:
- PHASE 1:
  - PayPal – online payments
  - Oracle Fusion Cloud - Financial Management
  - ESRI – Feed CIP Projects and Private Development from Accela to ESRI
  - ePermitHub – Plan Review/document markup
  - Broward County Property Appraiser

- PHASE 2:
  - Batch job case report processing for manual upload for Legistar
  - Gridics – Ability for Gridics to query information from Accela via the Enhanced Reporting Database
  - Laserfiche/Enterprise Content Management – Document Storage
  - Rock Solid – 311 Integration
  - Granicus - Noise Complaints
  - IVR – Cisco

Data conversion will be a part of Phase 2 as a deliverable for that production go-live release.

# PROJECT METHODOLOGY

Accela's Services team will apply Accela's standard methodology throughout the life of the Agency's implementation. This is a proven methodology that ensures quality results and positions the Agency for success.

Accela and the Agency will prepare a joint project plan and Accela will provide a project manager and key resources to complete implementation tasks alongside the Agency team. This service is delivered over two releases broken down into four stages (Define, Refine, Develop and Deploy) resulting in the Agency's production use of the solution.

The methodology is based on existing or pre-configured solutions – the existing configuration will be used as the starting point for the tailoring process.  It is important for the Agency to adopt Accela's best practices, have their staff become familiar with how the system will work for their business processes, and to understand that over time the solution can evolve as the Agency implements standard practices or business changes.

A high-level overview of the methodology, associated activities and artifacts is defined in the table below. Details on the methodology are provided in Appendix D, which will serve as the basis for the parties' joint project plan and schedule. Deviations from the methodology, or agreed schedule, are handled via the change control and governance processes defined in the Project Management Plan.

| Stage Title | Stage Overview | Activities and Artifacts |
|---|---|---|
| Stage 1: Define | The Define stage sets the framework for how the project will be managed throughout the project life cycle. | • Project Schedule<br>• Project Management Plan<br>• Project Kickoff<br>• Solution Provisioning |
| Stage 2: Refine | The Refine stage begins the knowledge transfer of the Agency's Accela Civic Platform solution and promotes adoption of the new system. This stage completes the Agency-specific tailoring of the configuration. | • Core Team Training<br>• Tailoring Sessions<br>• Review and Verification testing<br>• Conference Room Checkpoints<br>• Integration Designs<br>• Data Conversion Kickoff |
| Stage 3: Develop | The Develop stage builds upon the tailored solution from the Refine Stage adding automation, custom reports, integrations, and running the data conversion efforts. The result of this stage is a fully built solution ready for deployment. | • Business Automation Configuration<br>• Custom Report development<br>• Integration development<br>• Data Conversion mock runs<br>• Review and Verification testing<br>• Conference Room Checkpoints |
| Stage 4: Deploy | After all development work has been completed, the system is ready for User Acceptance Testing (UAT) and End User Training.  The final data conversion and cutover activities support Go-Live. | • Training Plan<br>• Test Plan and Test Cases<br>• User Acceptance Testing<br>• End User Training |

| Stage Title | Stage Overview | Activities and Artifacts |
|---|---|---|
| | | • Final extract for production<br>• Final conversion load into Production<br>• Go Live Support and Transition to Accela Customer Support |

## GOVERNING PRINCIPLES

For Accela and the Agency to successfully perform the onboarding described herein, there are several critical success factors that must be closely monitored and managed by the Accela and Agency stakeholders.  These factors are critical in setting expectations between the Agency and Accela, identifying and monitoring risks, and promoting strong communication:

- **Clear Business Objectives** – The Customer has clearly documented their business objectives before the commencement of onboarding and shared those objectives with Accela.
- **Accept Civic Application Solution(s)** – The Customer acknowledges that a standard Civic Application package solution will provide end-to-end processing of an application or permit solution and may require some modifications to how the Customer conducts business today. Customer staff supporting the tailoring sessions should have an open mind to accept these standard solutions based on Accela's many years of applying best practices to the implementation process. These solutions will allow for online processing, attaching documents, processing the application via a workflow, sending notifications based on workflow status, accepting payment, allowing to capture standard comments, and if required trigger inspections. The solutions will allow the Customer to process their applications and/or permits.
- **Agency-specific Tailoring Inputs Identified and Documented** – The Customer has documented and has a clear understanding of their processes to enable the Accela team to perform solution tailoring. For example, the Customer must have a clear understanding on how fees are calculated to support the solution. If there is an expectation that the Customer's business processes expand the scope of the solution, Accela will raise this risk to the Customer prior to proceeding.
- **Dedicated Agency Participation** – Agency acknowledges and agrees, throughout the duration of the services, to have (i) its staff and/or contractors actively involved in the Project, and (ii) its software, hardware and other technology performing (or available for performance), each as specified in the agreed upon Project Plan (such Agency personnel and technology, collectively the Agency resources).  Accela will communicate insufficient participation of Agency resources through Project Status Reports and will indicate actual and potential impacts to the Project Timeline.  Accela will work with the Agency's Executive Sponsors and department leaders to determine appropriate team member involvement.  This could range from full-time, during early analysis meetings, to part-time during the technical development phase.  Please see Appendix E for a full description of Agency resources.
- **Executive Sponsorship, Governance, and Change Control** – The initiative is supported by executive sponsors within the Agency who will drive the Agency staff participants towards overarching goals and standardization/adoption of the Civic Application Solution. The executives will remove roadblocks, quickly make decisions, support risk mitigation, and resolve escalated issues. Effective governance during the onboarding period and tight change control processes for the subscribed solution require alignment across Agency stakeholders. Throughout the project, the teams will encounter issues and decisions that require engagement of the joint Agency/Accela governance

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team. Invariably, changes to the identified solution will arise and the governance process must resolve these issues with urgency in order to avoid impacts to the schedule and scope.

- **Accela Standard Implementation Methodology** – Agency acknowledges that it is willing to adhere to and will adopt Accela's implementation methodology.  Please see Appendix D for a full description of the Accela implementation methodology.
- **Knowledge Transfer** – Agency personnel must participate in all the implementation stages and activities for Accela to transfer knowledge to the Agency. Once Post-Production transition tasks are completed by Accela, Agency personnel will assume all day-to-day business operation of the solution.

# ADMINISTRATION

## PROJECT TIMELINE

The project is estimated to take **19 months**. The projected start date for the Project is forty-five (45) calendar days after mutual acceptance and signature of this SOW.  A detailed schedule will be developed during the Define stage in collaboration with Accela and Agency Project Manager.

Notwithstanding anything to the contrary, upon completion of the work defined in this SOW, this SOW will expire.  The table below shows an estimated high-level timeline.  See Appendix I for more detail on the timeline.

**Phase 1**

| Month 1 | Define Stage |
|---|---|
| Months 2 -4 | Refine |
| Months 3-5 | Develop Stage |
| Month 6 | Deploy Stage |

**Phase 2**

| Month 1 | Define Stage |
|---|---|
| Months 3 -14 | Refine |
| Months 5-16 | Develop Stage |
| Months 16-19 | Deploy Stage |

The project timeline is dependent on following the agreed upon Project Schedule, described further in Appendix D – Methodology.  Throughout the project, several tasks will require Agency input, review and/or approval before moving to the next task.  Unless otherwise specified in the Project Schedule, the timeline assumes that all Agency turn-around times are completed within 5 business days.

## PROJECTS PUT ON HOLD

It is understood that sometimes Agency priorities are revised requiring the Agency to place the Accela implementation on hold.  The Agency must send a formal written request to Accela to put the project on hold.

If either party puts the project on hold for more than 90 days, the other party reserves the right to terminate the contract or negotiate new terms.

When a Project is put on hold, at minimum, a mutually agreed upon Change Order will be created to track impacts to the project.

Should either party become non-responsive to the other party's communications for a term of 30 calendar days regarding continuance of the project work, the other party can choose to cancel the remainder of the Statement of Work.  If both parties desire to finish the project, a new Statement of Work may be negotiated at the standard contract rates.

## PAYMENT TERMS

Accela will perform the Services on a Billing Milestone payment basis. Payments will be based on: (i) the nature and scope of the Services and associated Billing Milestones outlined, (ii) the expected staffing requirements, (iii) the Project Schedule, (iv) Accela's and Customer's roles and responsibilities, and (v) the other assumptions as set forth in this SOW. The Fixed-Fee 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.  After the Agency signs the Deliverable Acceptance Form, Carahsoft will generate an invoice for the corresponding Deliverable payment.

For those deliverables denoted with an asterisk in the table below, please refer to these Deliverable-based Assumptions:
- Deliverables will be documented in Accela-based templates using the Accela methodology. There is no stated or implied promise that deliverables will be of a specified page length or comply with Agency formatting requirements.  Sample templates are available to the Agency upon request.
- Initial Review: For deliverables turned over to the Agency, Agency will have 5 business days to conduct review (or testing) of the deliverable. Upon delivery of feedback, Accela will complete the agreed upon updates.  If no comments are provided at the end of the 5-day period, the deliverable will be submitted for Final Review and Acceptance as outlined below.
- Final Review and Acceptance: Upon completing any updates following the initial review period, Accela will deliver the final deliverable to the Agency for acceptance. Accela will provide the Agency with the Accela Deliverable Acceptance Form to formalize acceptance and completion of that piece of scope.  The criteria outlined in the Services for the corresponding deliverable will be deemed accepted based on the acceptance criteria herein. The Deliverable Acceptance Form is subsequently signed by the appropriate Agency contact, as defined in the Project Management Plan, and delivered to Accela.  The Agency has 10 business days to perform a final review (or test) of the deliverable and to sign off on the Deliverable Acceptance form.  Agency agrees to assign a single designated approver for each project deliverable. The designated approver will be responsible for overseeing and/or directly participating in the design and development, as well as the approval, of the deliverable.  Agency may make changes to designated approvers with written notification to Accela a minimum of one month before a deliverable is due.

For those without asterisks, sign-off must be completed within 10 business days of delivering the acceptance form.

The following lists each deliverable associated with a payment and its criteria for acceptance.  The details for each deliverable, including Accela and Agency responsibilities, can be found in Appendix D (Accela Methodology).

| Stage Title | Payment Milestone | Acceptance Criteria | Milestone Amount | Estimated Month for Delivery |
|---|---|---|---|---|
| Stage 1: Define | Project Startup | • Delivery of the baseline project schedule reflecting Agency and Accela inputs* <br> • Delivery of the Project Management Plan reflecting Agency and Accela inputs* <br> • Delivery of Project Kickoff presentation and completion of meeting | $51,948.00 | Month 1 |
| | Solution Provisioning | • Delivery of the Accela Civic Platform software and confirmation of Agency's ability to log in | $51,948.00 | Month 1 |
| Stage 2: Refine | Core Team Training | • Delivery of Core Team Training | $31,168.80 | Month 2 |
| | Tailoring Sessions Group 1 PHASE 1 | • Complete Tailoring Sessions for Group 1 | $39,334.69 | Month 2 |
| | Tailoring Sessions Group 2 PHASE 1 | • Complete Tailoring Sessions for Group 2 | $39,334.69 | Month 3 |
| | Tailoring Sessions Group 3 PHASE 2 | • Complete Tailoring Sessions for Group 3 | $39,334.69 | Month 4 |
| | Tailoring Sessions Group 4 PHASE 2 | • Complete Tailoring Sessions for Group 4 | $39,334.69 | Month 5 |
| | Tailoring Sessions Group 5 PHASE 2 | • Complete Tailoring Sessions for Group 5 | $39,334.69 | Month 6 |
| | Tailoring Sessions Group 6 PHASE 2 | • Complete Tailoring Sessions for Group 6 | $39,334.69 | Month 7 |
| | Tailoring Sessions Group 7 PHASE 2 | • Complete Tailoring Sessions for Group 7 | $39,334.69 | Month 8 |
| | Tailoring Sessions Group 8 PHASE 2 | • Complete Tailoring Sessions for Group 8 | $39,334.69 | Month 9 |
| | Tailoring Sessions Group 9 PHASE 2 | • Complete Tailoring Sessions for Group 9 | $39,334.69 | Month 10 |
| | Tailoring Sessions Group 10 PHASE 2 | • Complete Tailoring Sessions for Group 10 | $39,334.69 | Month 11 |
| | Tailoring Sessions Group 11 PHASE 2 | • Complete Tailoring Sessions for Group 11 | $39,334.69 | Month 12 |
| | Tailoring Sessions Group 12 PHASE 2 | • Complete Tailoring Sessions for Group 12 | $39,334.69 | Month 13 |
| | Refine Stage Conference Room | • Delivery of Configuration Report for each record | $39,334.69 | Month 3 |

| Stage Title | Payment Milestone | Acceptance Criteria | Milestone Amount | Estimated Month for Delivery |
|---|---|---|---|---|
| | Checkpoints Group 1 PHASE 1 | type, serving as a snapshot of the tailored configuration<br>• Complete Conference Room Checkpoint for Group 1 | | |
| | Refine Stage Conference Room Checkpoints Group 2 PHASE 1 | • Delivery of Configuration Report for each record type, serving as a snapshot of the tailored configuration<br>• Complete Conference Room Checkpoint for Group 2 | $39,334.69 | Month 4 |
| | Refine Stage Conference Room Checkpoints Group 3 PHASE 2 | • Delivery of Configuration Report for each record type, serving as a snapshot of the tailored configuration<br>• Complete Conference Room Checkpoint for Group 3 | $39,334.69 | Month 5 |
| | Refine Stage Conference Room Checkpoints Group 4 PHASE 2 | • Delivery of Configuration Report for each record type, serving as a snapshot of the tailored configuration<br>• Complete Conference Room Checkpoint for Group 4 | $39,334.69 | Month 6 |
| | Refine Stage Conference Room Checkpoints Group 5 PHASE 2 | • Delivery of Configuration Report for each record type, serving as a snapshot of the tailored configuration<br>• Complete Conference Room Checkpoint for Group 5 | $39,334.69 | Month 7 |
| | Refine Stage Conference Room Checkpoints Group 6 PHASE 2 | • Delivery of Configuration Report for each record type, serving as a snapshot of the tailored configuration | $39,334.69 | Month 8 |

| Stage Title | Payment Milestone | Acceptance Criteria | Milestone Amount | Estimated Month for Delivery |
|---|---|---|---|---|
| | | • Complete Conference Room Checkpoint for Group 6 | | |
| | Refine Stage Conference Room Checkpoints Group 7 PHASE 2 | • Delivery of Configuration Report for each record type, serving as a snapshot of the tailored configuration<br>• Complete Conference Room Checkpoint for Group 7 | $39,334.69 | Month 9 |
| | Refine Stage Conference Room Checkpoints Group 8 PHASE 2 | • Delivery of Configuration Report for each record type, serving as a snapshot of the tailored configuration<br>• Complete Conference Room Checkpoint for Group 8 | $39,334.69 | Month 10 |
| | Refine Stage Conference Room Checkpoints Group 9 PHASE 2 | • Delivery of Configuration Report for each record type, serving as a snapshot of the tailored configuration<br>• Complete Conference Room Checkpoint for Group 9 | $39,334.69 | Month 11 |
| | Refine Stage Conference Room Checkpoints Group 10 PHASE 2 | • Delivery of Configuration Report for each record type, serving as a snapshot of the tailored configuration<br>• Complete Conference Room Checkpoint for Group 10 | $39,334.69 | Month 12 |
| | Refine Stage Conference Room Checkpoints Group 11 PHASE 2 | • Delivery of Configuration Report for each record type, serving as a snapshot of the tailored configuration<br>• Complete Conference Room Checkpoint for Group 11 | $39,334.69 | Month 13 |

| Stage Title | Payment Milestone | Acceptance Criteria | Milestone Amount | Estimated Month for Delivery |
|---|---|---|---|---|
| | Refine Stage Conference Room Checkpoints Group 12 PHASE 2 | • Delivery of Configuration Report for each record type, serving as a snapshot of the tailored configuration<br>• Complete Conference Room Checkpoint for Group 12 | $39,334.69 | Month 14 |
| | Report Specifications PHASE 1* | • Delivery of four (4) final Report specifications for each report Accela will develop | $39,334.69 | Month 3 |
| | Report Specifications PHASE 2* | • Delivery of ten (10) final Report specifications for each report Accela will develop | $39,334.69 | Month 8 |
| | Report Specifications PHASE 2* | • Delivery of eleven (11) final Report specifications for each report Accela will develop | $39,334.69 | Month 10 |
| | Integration Specifications for PHASE 1* | • Delivery of final Integration specifications for Oracle Fusion Cloud, Payment Processor, and ESRI GIS integration | $39,334.69 | Month 2 |
| | Integration Specification for PHASE 2* | • Delivery of final Integration specifications | $39,334.69 | Month 3 |
| | Data Conversion Kickoff and Training | • Conduct Data Conversion Training on the Accela Conversion Tools and Methodology | $15,584.40 | Month 2 |
| | Data Conversion Mock Run 1 | • Load from conversion environment into hosted non-production environment for mock run | $25,974.00 | Month 8 |
| | Data Conversion Mock Run 2 | • Load from conversion environment into hosted non-production environment for mock run | $25,974.00 | Month 13 |

| Stage Title | Payment Milestone | Acceptance Criteria | Milestone Amount | Estimated Month for Delivery |
|---|---|---|---|---|
| | Data Conversion Mock Run 3 | • Load from conversion environment into hosted non-production environment for mock run | $25,974.00 | Month 16 |
| | Develop Stage Conference Room Checkpoints for Group 1 PHASE 1 | • Conduct Conference Room Checkpoint demonstrating the final configured solution, business automation, interfaces, and reports for Group 1 | $50,840.78 | Month 5 |
| | Develop Stage Conference Room Checkpoints Group 2 PHASE 1 | • Conduct Conference Room Checkpoint demonstrating the final configured solution, business automation, interfaces, and reports for Group 2 | $50,840.78 | Month 6 |
| | Develop Stage Conference Room Checkpoints Group 3 PHASE 2 | • Conduct Conference Room Checkpoint demonstrating the final configured solution, business automation, interfaces, and reports for Group 3 | $50,840.78 | Month 7 |
| | Develop Stage Conference Room Checkpoints Group 4 PHASE 2 | • Conduct Conference Room Checkpoint demonstrating the final configured solution, business automation, interfaces, and reports for Group 4 | $50,840.78 | Month 8 |
| | Develop Stage Conference Room Checkpoints Group 5 PHASE 2 | • Conduct Conference Room Checkpoint demonstrating the final configured solution, business automation, interfaces, and reports for Group 5 | $50,840.78 | Month 9 |
| | Develop Stage Conference Room Checkpoints Group 6 PHASE 2 | • Conduct Conference Room Checkpoint demonstrating the final configured solution, | $50,840.78 | Month 10 |

| Stage Title | Payment Milestone | Acceptance Criteria | Milestone Amount | Estimated Month for Delivery |
|---|---|---|---|---|
| | | business automation, interfaces, and reports for Group 6 | | |
| | Develop Stage Conference Room Checkpoints Group 7 PHASE 2 | • Conduct Conference Room Checkpoint demonstrating the final configured solution, business automation, interfaces, and reports for Group 7 | $50,840.78 | Month 11 |
| | Develop Stage Conference Room Checkpoints Group 8 PHASE 2 | • Conduct Conference Room Checkpoint demonstrating the final configured solution, business automation, interfaces, and reports for Group 8 | $50,840.78 | Month 12 |
| | Develop Stage Conference Room Checkpoints Group 9 PHASE 2 | • Conduct Conference Room Checkpoint demonstrating the final configured solution, business automation, interfaces, and reports for Group 9 | $50,840.78 | Month 13 |
| | Develop Stage Conference Room Checkpoints Group 10 PHASE 2 | • Conduct Conference Room Checkpoint demonstrating the final configured solution, business automation, interfaces, and reports for Group 10 | $50,840.78 | Month 14 |
| | Develop Stage Conference Room Checkpoints Group 11 PHASE 2 | • Conduct Conference Room Checkpoint demonstrating the final configured solution, business automation, interfaces, and reports for Group 11 | $50,840.78 | Month 15 |
| | Develop Stage Conference Room Checkpoints Group 12 PHASE 2 | • Conduct Conference Room Checkpoint demonstrating the final configured solution, business automation, | $50,840.78 | Month 16 |

| Stage Title | Payment Milestone | Acceptance Criteria | Milestone Amount | Estimated Month for Delivery |
|---|---|---|---|---|
| | | interfaces, and reports for Group 12 | | |
| Stage 4: Deploy | Testing Plan* | • Delivery of the Testing Plan reflecting Agency and Accela inputs | $20,779.20 | Month 2 |
| | Training Plan* | • Delivery of the Training Plan reflecting Agency and Accela inputs | $20,779.20 | Month 2 |
| | UAT – Remediation and Remediation Testing Support PHASE 1 | • Support for Remediation and Remediation Testing period<br>• Resolution of critical and high punch list defects related to configuration or Accela custom development (sign-off is not dependent on resolution of product defects) | $15,584.40 | Month 6 |
| | UAT – Remediation and Remediation Testing Support PHASE 2 | • Support for Remediation and Remediation Testing period<br>• Resolution of critical and high punch list defects related to configuration or Accela custom development (sign-off is not dependent on resolution of product defects) | $39,334.69 | Month 18 |
| | Train the Trainer PHASE 1 | • Delivery of Train the Trainer | $10,389.60 | Month 6 |
| | Train the Trainer PHASE 2 | • Delivery of Train the Trainer | $20,779.20 | Month 18 |
| | Production Go Live PHASE 1 | • Production system is available for daily use by the Agency | $41,558.40 | Month 6 |
| | Production Go Live PHASE 2 | • Production system is available for daily use by the Agency | $41,558.40 | Month 19 |
| | Transition to Customer Support | • Execution of post-go live support, per Appendix B scope | $51,948.00 | Month 19 |

| Stage Title | Payment Milestone | Acceptance Criteria | Milestone Amount | Estimated Month for Delivery |
|---|---|---|---|---|
| | | • Official transfer from the Accela Professional Services project team to Accela Customer Support (sign-off is not dependent on resolution of defects that are transitioned to Customer Support) | | |
| **TOTAL DELIVERABLES COST** | | | $2,242,077.66 | |
| **TOTAL TRAVEL EXPENSES** | | | **$40,000** | |
| | | *GRAND TOTAL* | $2,282,077.66 | |

Payments are due net 30 of the invoice date.

## EXPENSES

Accela will provide up to a total of **sixteen (16) Weeks** of onsite Services. A "Week" is defined as one (1) person, for four (4) days or 40 hours, Monday through Thursday, allowing for travel time on Monday morning and Friday afternoon. Accela may assign more than one person per Week.  For purposes of clarification only, if Accela assigns one person for one Week, this assignment will count as one (1) onsite Services Week, if Accela assigns two (2) people simultaneously for a one (1) Week onsite assignment, this assignment will count as two (2) Weeks of onsite Services.  The cost for each week of travel expenses is estimated at $2,500. The travel expense budget estimate is **$40,000** Accela will not book travel without Customer's prior written consent.  Should the customer require more onsite trips than the included above, Agency approval will be required prior to additional travel commencing to cover the cost of those additional trips.

Actual amounts of any reasonable and customary travel expenses incurred during the performance of services will be billed to Agency, according to Accela expense policy.  Carahsoft 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).  Carahsoft and Accela will work with Customer to manage and control its expenses in accordance with Accela's global 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 Accela engagement experience.

## CONTRACT SUM

The total amount payable under this SOW is $2,282,077.66

The estimated fees for this SOW are predicated on the timely completion of Project milestones. However, should completion of milestones become delayed due to actions or inactions of either party, a mutual change order describing the impact to resources, timeline, and/or cost will be created. Any change order will need to be approved by both Agency and Accela. Change orders will need to be approved within three (3) business days of delivery to avoid a halt of work on the Project.

## CHANGE ORDERS

In order to make a change to the scope of the Services in this SOW, and subject to the Disclaimers below, the Agency must submit a written request to Accela specifying the proposed changes in detail. Accela will submit to the Agency an estimate of the charges and the anticipated changes in the delivery schedule that will result from the proposed change in the Change Order, based on the standard rate for Accela resources $259.74 per hour. Accela will continue performing the Services in accordance with the SOW until the parties agree in writing on the change in scope of work, scheduling, and fees. If Accela's effort changes, such as changes to the baseline schedule, roles, responsibilities, assumptions, or scope, or if additional support hours are required, a change order will be created that details these changes and impact to project and cost (if any). Any change order must be agreed to by Accela and Agency prior to commencing any activities defined in the change order.

## EXPIRATION

The scope and terms of this SOW must be executed within sixty (60) calendar days of the date of this SOW. If the SOW is not executed within that timeframe, the current scope and terms can be renegotiated.

## DISCLAIMERS

Carahsoft and Accela makes no warranties in respect of its Services described in this SOW except as set out in the Agreement. Any configuration of or modification to the Product that can be consistently supported by Accela via APIs, does not require direct database changes and is capable of being tested and maintained by Accela will be considered a "Supported Modification". Accela's obligations and warranties in respect of its Services, Products, and maintenance and support, as set out the agreement between Accela and Agency, does not extend outside the Supported Modifications or to any Agency manipulation of implemented scripts, reports, integrations, and adapters.

In the event the Agency requires significant work beyond the scope of the included configuration and onboarding services, Accela may request that the Agency separately engages Accela's Services organization to complete the out-of-scope services. In such an instance, a separate proposal and statement of work for the additional services will be drawn up and agreed on between the parties.

# ASSUMPTIONS

## GENERAL SCOPE ASSUMPTIONS

- Any coding or integrations not specifically described in this document are not in scope.
- Development of test cases is not in scope of Accela Services.
- Development of custom training materials is not in scope of Accela Services.
- Scope of the Project is based on discovery sessions with Agency prior to the SOW development.
- Agency's business days are Monday-Thursday, excluding Agency holidays, 7:00AM-6:00PM (EST).

## PROJECT RESOURCING ASSUMPTIONS

- Resources expected by the Agency and Accela are listed in Appendix E.
- Accela personnel will attend Agency executive steering committee meetings, either in-person or remotely.
- In the pricing, Accela has assumed the appropriate resourcing to ensure success for the scope outlined in Appendix E Project Resources.
- Accela personnel will not be required to provide Services on-site if doing so would put Accela personnel at actual or potential risk, as determined at Accela's sole discretion.
- Either party is not responsible for impacts to the project timeline created by dependency on the other party's third party consultants.
- When the project team works onsite at an Agency facility, suitable workspace will be provided and equipped with appropriately functional and network access to and connectivity with all systems, networks, and data as necessary to perform the project. Agency will also provide necessary security badges, parking passes as required.

## ACCELA TECHNICAL ASSUMPTIONS

- Accela and Agency will model the public portal after the City of Weston Florida's public portal.
- Agency will ensure that Accela resources have access to a Dev or Test version of the 3rd party system for integration development.  All integrations will be developed against one (1) agreed upon version of the 3rd party system.  Additionally, the Agency will ensure Accela resources have access to a Production environment of the 3rd party system.
- Agency will select/purchase/acquire the appropriate third-party software prior to the Project Start Date.
- Agency is responsible for providing all third-party end user training and third-party training for Accela staff.
- Accela will host the source code repository which is integrated with the Accela Civic Platform. If the customer has an existing code repository, the Accela repository will be the master (source of truth) until project completion.
- Agency must provide a Contact for all third-party systems, to be available for collaboration.
- Agency must have sufficient licenses in place to allow a minimum of one (1) Accela installation.
- Agency is responsible for hosting any integrations.
- Agency is responsible for obtaining a code source repository prior to go-live, to maintain custom scripting code.
- Any Professional Services associated with ePermitHub, Laserfiche, and other third-party products are not included in this Statement of Work and should be contracted directly through those products or their affiliates.  Accela Project Manager will work closely with the software provider Project Manager(s) to align and coordinate on schedule and deliverables per the contract.

# SIGNATURES

This Statement of Work is agreed to by the parties and made effective upon the date of last signature. If undated by Agency, the effective date will be as of the Carahsoft signature hereto.

| Carahsoft | Hollywood, FL |
|---|---|
| _____ <br> *Authorized Signature* | _____ <br> *Authorized Signature* |
| _____ <br> *Name – Type or Print* | _____ <br> *Name – Type or Print* |
| _____ <br> *Title* | _____ <br> *Title* |
| _____ <br> *Date* | _____ <br> *Date* |

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# APPENDIX A: SOLUTION INVENTORY

This appendix lists the subscribed Solution Inventory. This inventory has been created based on consultation with the Agency. For solutions where there is a pre-built Accela Civic Application, solution type is denoted as "Civic Application". This list represents all record types that are in scope for the implementation. There are 96 Accela record types that will be configured to manage the 156 City permits and contractor licenses by consolidation and use of sub-categories. Twenty-Five (25) Permit types marked with "Phase 1" will be part of the first production release. Please see Appendix G and Appendix H for more information on the mapping. The summarized list of Phase 1 permits are also listed here. These permits will follow the same consolidation structure as indicated in Appendix G:

**Structural - General**
1. Fence Permit
2. Reroof Permit
3. Temporary Structure Permit
4. Window and Door Permit
5. Shutters

**Electrical**
6. Commercial Electrical Work Permit
7. Residential Electrical Work Permit
8. Photovoltaic/Solar Permit
9. Service Change/Service Request Permit
10. Service Reconnect/Safety Inspection Permit
11. Temporary Power/30 Day Temp Permit

**Mechanical**
12. Commercial Mechanical Work Permit
13. Residential Mechanical Work Permit
14. HVAC Changeout Permit

**Plumbing**
15. Plumbing Work Permit
16. Demolition Permit (handled under the Commercial and Residential Demolition Permit)
17. Water Heater Permit
18. Water and Sewer Connection Permit

**Engineering**
19. Landscape Permit
20. Tree Removal Permit
21. Driveway Permit

**Building Safety Inspection Program**
22. Structural Concrete Restoration BSIP
23. Electrical Repairs BISP

**Zoning**
24. Sign Permit
25. Certificate of Use Permit

| # | Structural - Commercial | Civic Application |
|---|---|---|
| 1 | *Commercial Addition Permit* | Comm Addition |
| 2 | *Commercial Alteration Permit* | Comm Alteration |
| 3 | Commercial Demolition Permit | Comm Demo |

| 4 | Commercial New Construction Permit | Comm New |
|---|---|---|
| 5 | Pool | Comm Pool |
| | **Structural - Residential** | |
| 6 | *Residential Addition Permit* | Res Addition |
| 7 | *Residential Alteration Permit* | Res Alteration |
| 8 | Residential Demolition Permit | Res Demo |
| 9 | Residential New Construction Permit | Res New Construction |
| 10 | Pool | Res Pool |
| | **Structural - General** | |
| 11 | Amusement / Events Permit | Special Events |
| 12 | Antenna Permit (Structural) | Cell Tower |
| 13 | Bulkhead/ Davit / Dock / Seawall Permit | Custom |
| 14 | Change of Use | *Change of Use* |
| 15 | Deck / Gazebo / Patio / Trellis Permit | Custom |
| 16 | Elevator Permit | Elevator |
| 17 | Fence Permit - PHASE 1 | Fence |
| 18 | Modular / Mobile Home Permit | Mobile |
| 19 | Reroof Permit - PHASE 1 | |
| 20 | New Roof | Roof |
| 21 | Misc. Structure Permit | Accessory Structure |
| 22 | Temporary Structure Permit - PHASE 1 | Temp Structure |
| 23 | Window and Door Permit - PHASE 1 | Custom |
| 24 | Shutters - PHASE 1 | |
| 25 | Screen Enclosure | |
| 26 | Dumpster Enclosure | |
| 27 | Concrete Restoration | Foundation |
| 28 | Awning/Canopy | Custom |
| | **Electrical** | |
| 29 | Amusement / Events / Film Permit | Residential Electrical |
| 30 | Antenna Permit | Commercial Electrical |
| 31 | Residential Electrical Work - PHASE 1 | |
| 32 | Commercial Electrical Work - PHASE 1 | |
| 33 | Generator Permit | |
| 34 | Low Voltage Permit | |
| 35 | Photovoltaic / Solar Permit - PHASE 1 | |
| 36 | Premise Permit | |
| 37 | Service Change / Service Repair Permit - PHASE 1 | |
| 38 | Service Reconnect / Safety Inspection Permit - PHASE 1 | |
| 39 | Temporary Power/30 Day Temp Permit - PHASE 1 | |
| | **Mechanical** | |
| 40 | Cooling Tower / Boiler / Chiller / Pump System Permit | Commercial Mech |
| 41 | Fuel Tank / Fuel Piping Permit | Residential Mech |
| 42 | Heating / Ventilation / AC Permit | |
| 43 | HVAC Changeout Permit | |
| 44 | Commercial Mechanical Work - PHASE 1 | |
| 45 | Residential Mechanical Work - PHASE 1 | |
| 46 | Spray Booth Permit | |
| 47 | Chemical Fire Suppression Permit | |
| 48 | Hood | |
| | **Plumbing** | |

| 49 | Gas Permit | Residential Plumbing |
| 50 | Irrigation Permit | Commercial Plumbing |
| 51 | Piping Repair Permit | |
| 52 | Residential Plumbing Work - PHASE 1 | |
| 53 | Commercial Plumbing Work - PHASE 1 | |
| 54 | Sewer Cap - Punch and Fill Permit | |
| 55 | Water Heater Permit - PHASE 1 | |
| 56 | Water and Sewer Connection Permit - PHASE 1 | |
| 57 | Water Meter | |
| 58 | Backflow Preventer | |
| | **Engineering** | |
| 59 | Right of Way Permit | ROW |
| 60 | Landscape Permit - PHASE 1 | Grading |
| 61 | Onsite Portable Storage Permit | Temp Structure |
| 62 | Tree Removal Permit - PHASE 1 | Tree Removal |
| 63 | Site Improvement Permit | Custom |
| 64 | Sealcoat and pavement Marking & Signage | Custom |
| 65 | Earthwork, Clearing and Grubbing | |
| 66 | Excavation | Excavation |
| 67 | Driveway Permit - PHASE 1 | Driveway Permit |
| 68 | Requests | |
| 69 | Sidewalk Café | Sidewalk Use |
| | **Fire** | |
| 70 | Engineered Life Safety System Permit | Custom |
| 71 | BDA Signal Strength Survey Permit | Custom |
| 72 | Fire Main Underground Permit | Fire Prevention |
| 73 | Fire Pump Permit | Custom |
| 74 | Commercial Fire Sprinkler | Fire Suppression Permit |
| 75 | Commercial Flow Test | Custom |
| 76 | Commercial Fire Alarm | Fire Suppression Permit |
| | **Building Safety Inspection Program** | |
| 77 | Structural Concrete Restoration BSIP - PHASE 1 | Custom |
| 78 | Electrical Repairs BSIP - PHASE 1 | Custom |
| | **Right of Way** | |
| 79 | Milling & Resurfacing of Right of Way | Paving |
| 80 | Maintenance of Traffic | Traffic Control |
| 81 | Sidewalk Construction | Sidewalk Permit |
| 82 | Water Sewer and Drainage | Sewer Connection |
| 83 | Landscape | Landscape |
| 84 | Private/ Franchise Utility Work | Custom |
| | **Code** | |
| 85 | Residential | Code/violation |
| 86 | Non-Residential | Inspection |
| 87 | Vacation Rental Inspection | Case |
| 88 | Special Magistrate | |
| 89 | Marine | |
| | **Planning** | |

| 90 | Historic Preservation Site Plan/ Design | |
| 91 | Site Plan/ Design | Site Plan |
| 92 | Certificate of Appropriateness for Design/ Demolitions | COA |
| 93 | Variances | Variance |
| 94 | Re-Zoning | Re-zone |
| 95 | Land Use Changes | Change in non-conforming use |
| 96 | Planned Developments | Planned Unit Development |
| 97 | Special Exceptions | Special Use |
| 98 | Appeals | Appeals |
| 99 | Flex Units | Custom |
| 100 | Historic Designations | Historic Site Request |
| 101 | General Amendment | |
| 102 | Amendment To approved plans | |
| 103 | Public Art Permit | Custom |
| | **Zoning** | |
| 104 | Certificate of Use - PHASE 1 | Conditional Use Authorization |
| 105 | Extended Hour License | Custom |
| 106 | Liquor License | Custom |
| 107 | Paint Permit | Custom |
| 108 | Address Designations | Custom |
| 109 | Zoning Letters | Zone Verification |
| 110 | Front Determination Letter | Custom |
| 111 | Platting | Plat |
| 112 | Waivers | |
| 113 | Revocations | Amendment |
| 114 | Appeals | Appeals |
| 115 | Special Magistrate | |
| 116 | Sign Permit - PHASE 1 | Sign |
| 117 | Temporary Sign | Temporary Sign |
| 118 | Lot Line/Subdivision | |
| 119 | Easement agreements | Custom |
| 120 | Project | |
| 121 | Pre-Application | |
| | **Floodplain** | |
| 122 | Flood Zone Determination Letters | Zoning Verification |
| 123 | Substantial Improvement Determination | Floodplain |
| 124 | Elevation Certificates Requests | Custom |
| 125 | Finished Floor Elevations Determination | |
| 126 | SFHA Development Application | |
| 127 | Mechanical and Electric Systems in SFHA Notification | |
| 128 | Gas or Liquid Storage Tanks in SFHA Notification | |
| 129 | SI/SD or Repair Owner's Affidavit | |
| 130 | SI/SD or Repair Contractor Affidavit | |
| 131 | Enclosure Non-conversion Agreement | |

| 132 | V-Zone Certificates | |
| 133 | Floodproofing Certificates | |
| 134 | CCCL Certificates | |
| | **Utilities** | |
| 135 | Sewer & Water Availability Letters | |
| 136 | Water and Sewer RCC Determination | |
| 137 | FDEP Water & Sewer Extension applications | Extension |
| 138 | Onsite Drainage | Custom |
| 139 | Utility Atlas Requests | Custom |
| 140 | Water Meter Requests | |
| 141 | Water Meter Removal Requests | |
| 142 | Sewer Connection Requests | |
| 143 | Water Tap Requests | |
| 144 | Temporary Hydrant Meter Requests | |
| | **Code Enforcement** | |
| 145 | Stipulated Agreements | Custom |
| 146 | Compliance Extensions | Extension |
| 147 | VRL Check List | |
| 148 | VRL Inspection Form | |
| 149 | Administrative Citation | |
| 150 | Appeal an Administrative Citation | Appeal |
| 151 | Request a call back from your Code Officer (create) | Custom |
| 152 | Dangerous Dog Permit | Custom |
| 153 | Bill Dispute | Appeal |
| 154 | Lien | Custom |
| 155 | State Licensed Contractor | Custom |
| 156 | County Registered Contractor | Custom |

# APPENDIX B: TAILORING FRAMEWORK

Accela will perform the tailoring identified below based on the record types listed in Appendix A Solution Inventory.

Accela will categorize the record types into logical "Record Groupings" based on similar functions and the teams that perform them. The number of records and groupings becomes the basis for project scheduling. The sections that follow describe how the project is scoped based on these groupings.

## RECORD GROUPINGS

The project assumes a total of 12 record groupings based on Appendix A. Two (2) record groups will be for Phase 1. Each record group will move through a 5 week tailoring process comprised of these high-level activities:
- One (1) week of Tailoring Sessions (two weeks for custom)
- One (1) week to tailor the configuration based on information collected in the sessions (two weeks for custom)
- Two (2) week Agency validation of the configured solution
- One (1) week to finalize configuration and conduct Conference Room Checkpoint

Throughout the time-boxed duration, Accela will work closely with the Agency to iterate on the configuration. It is expected that all tailoring for the record grouping can be completed in the time-box duration.

## TAILORING COMPONENTS

**Record-level**
- **Civic Application Records** – For those items in the Appendix A Solution Inventory where there is a pre-built Civic Application, the subscribed service includes limited Agency-specific tailoring:
  - **Data Fields** – Data fields, represented as Custom Fields or fields in a Custom List, are used to track data elements driven by Agency business processes or needed for reports. The Agency can request or modify an average of ten (10) new data fields per record type, above what is already provided in the Accela Civic Application. Accela will configure each new or modified agency defined data field using one of the data types: text, date, y/n radio button, number, dropdown list, comment text area, time, money, or checkbox. For each new or modified field, Accela will configure the field-level help text which will be displayed in Citizen Access. Historical data fields that are required for the purpose of historical data conversion will be identified and configured separately as part of the Data Conversion effort.
  - **Workflow** – the Agency will leverage the pre-built Civic Application workflows, with limited updates to task names and task statuses. The Agency can request up to five (5) new tasks or statuses.
  - **Fee Configuration** – Accela will configure fee items for each record in the Solution Inventory. A fee item represents a fee with a distinct general ledger account and item description on the invoice. Accela will configure each unique fee item based on the native fee formulas in the Civic Platform, which include flat fees, fees based on a specific range, and fees using fee indicators. Examples include fee calculations based on the number of employees or based on the square footage for a building. The Agency must provide their current fee schedules and account codes prior to Tailoring Sessions. Advanced fee item

setup, such as automating a fee calculation or automating the assessment of a fee (using scripting), is not included in the subscribed service.

- o **Document Types** – Applicant, Contractor, Authorized Agent, and Agency Staff can upload documents associated to a permit application.
- o **ACA** – For each Civic Application record in the Solution Inventory, a pre-defined series of pages to submit the application online (i.e., the record's pageflow) is included.  Each page in a pageflow can have its own instructional text.  Accela will update up to ten (10) instances of page-level instructional text and will train the Agency to update and maintain any further instructional text.

- ● **Custom Records** – For the processes in Appendix A that are marked "Custom", Accela will clone an existing process where possible, and tailor the components above for each custom record.  These updates must be completed and validated within the time-boxed tailoring process.

### System-level

- ● **Standard Comments –** Standard Comments allow staff to select from a predefined list of comments during processing of applications, inspections, workflows and checklists, promoting consistency across the system.  Accela will configure up to 300 standard comments.
- ● **Condition Management** – A condition is a requirement applied to a record, contact, address, or parcel that the applicant must fulfill to qualify for approval. Accela will configure up to ten (10) new or modified conditions total for the project, above what is already provided in the Accela Civic Application.  Automating the assessment or satisfaction of a condition (using scripting), is not included in the subscribed service.
- ● **Inspection Configuration –** To support inspection processing, Accela will configure:
  - o Inspection types associated to the records in the Solution Inventory
  - o Up to 20 discrete checklists (specific items inspectors are looking at during the corresponding inspection type. This will be different for each inspection type) for use in the system
  - o Associating the appropriate Accela users as inspectors in the system
  - o Up to 30 inspection districts (geographic areas in which inspectors are assigned to work) for use in the system
  - o Up to 10 inspection disciplines (area of expertise such as mechanical or electrical) for use in the system
  - o Up to 2 calendars (calendars used to determine when inspections can be done, the number of inspections done per day and who is available to perform inspections) to support the inspection process
  - o Note: the Civic Platform inspection configuration is also used by the Citizen Access (public portal) for citizens to schedule inspections.  Advanced inspection setup such as conditional inspection schedule is not included in the subscribed service.
- ● **User Groups** – Accela's Civic Applications are deployed with a pre-defined set of role-based user groups, such as Admin, Agency Admin, Daily, Inspector, Public User, and Read Only. Accela will provide new user groups across the project.  Accela will also work with the Agency to indicate which permissions need to be updated, as needed, for each user group.  Accela expects permission updates to each user group.  For example, if the Agency wants the inspector role to collect fees and payments, this will be a permission update to allow additional access to the current role defined.
- ● **Amendment Record** – Each Civic Application Solution is configured with one (1) Amendment record type.  The following will be included in this implementation:

1. Planning Amendment
2. Building Amendment
3. Fire Amendment
4. License Amendment

Each amendment type will allow standard changes such as address and contact updates. Other updates, such as changes to custom fields, would require a custom amendment record type and is not included in the subscribed service.

- **Notifications** – Accela uses standard automation to notify applicants of common processes performed in the system. The Civic Applications are pre-built with standard notifications such as the following. Custom notifications, outside of those pre-built in the Civic Applications, are not included in the subscribed service.
  o Additional Information required for application
  o Permit/License Issued
  o Application Denied
  o Inspection Scheduled
  o Inspection Result

## CONFIGURING CASHIERING AND POINT OF SALE

Accela will configure Cashiering with the following functionality:

- Setup initial fee schedules
- Provide the ability to enter ad hoc amount at transaction time
- Add POS line-item notes during processing
- Associate three (3) General Ledger accounts to the POS item
- Augment the existing flat file integration for finance to include the new POS items (if necessary)
- Editing and voiding fees
- Provide trust account configuration

The Agency is responsible for establishing the relationship with the payment processor vendor and providing Accela with merchant ID, access credentials and information required for the interface.

## CITIZEN ACCESS CONFIGURATION

Accela Citizen Access (ACA) is the Agency's public portal for citizens to submit applications and manage their information online. Included in your subscribed solution is:

- The ability for citizens to register and create an ACA account; this includes a registration complete notification and updating the online disclaimer text.
- Branding of your ACA site leveraging Accela's branding tools; this includes an Agency banner, logo, and color scheme
- Updating the online disclaimer text per module.

The following use cases are included in the subscribed solution:

- Submitting an online application for the records in the Solution Inventory that are deemed available online
- Ability for applicants to check on the status of a submitted application i.e., see where the application is within the workflow routed to a specific group
- Request an inspection
- Upload additional documents based on request from Agency

- Check the status of an issued license
- Renew a license

System will also provide shopping cart functionality, i.e., access the shopping cart throughout the order session, including:
- Changing items in the cart
- Removing items in the cart
- Adding items to the cart
    - Item descriptions
    - Item prices
    - Convenience fees
    - Total cost

## STANDARD REPORT BRANDING

Reports are defined as anything that can be output from the system, including but not limited to, reports, permits, forms, documents, notices, and letters. The Civic Application includes a set of pre-built standard reports and documents. Accela will apply standard Agency branding (i.e., logo and letterhead) to the Civic Application pre-built reports and outputs related to the records in the Solution Inventory.

## ACCELA MOBILE CONFIGURATION

Accela will configure Accela Mobile, which includes setting up permissions for the modules that access the Mobile App, configuring inspection filters, Geocoding, map service, and saved searches.

## ACCELA GIS CONFIGURATION

Accela will install and configure Accela GIS (JavaScript) to link and leverage existing Agency GIS information, including assistance with integrating map services with Accela GIS.  The following are the main objectives of Accela GIS implementation:
- Look up permit information and parcel information from the Civic Platform.
- View selection, location, and associated GIS information.
- Select one or more parcels and add new applications to the permit system.
- Auto-populate spatial attributes for a property in forms, based on mapping setup (including ACA).

During GIS implementation, Accela's staff will work with Agency IT staff to ensure that the components for hardware, software, database, network, and Internet are in place for the Accela GIS test and production environments.  Accela staff will validate the proper configuration of the Accela GIS environment.  The Agency must be running an Accela supported version of ArcGIS.

The following will be executed for this task:
- Configuration of map services within Accela GIS
- Configuration of xAPO
- Setup of 2 Proximity Alerts (EMSE script)
- Setup of 5 Attribute Mappings to Record Custom Fields

## USER ACCEPTANCE TESTING (UAT)

The Agency and Accela has agreed to the following User Acceptance Testing durations:

| Initial Testing | 2 weeks |
| Remediation | 1 week |
| Remediation Testing | 1 week |
| **Total User Testing Duration** | **4 weeks** |

Additional details may be found under the User Acceptance Testing section of Appendix D: Accela Methodology.

## POST GO-LIVE SUPPORT

Accela will provide **four (4) weeks** of post-production support to the Agency for each GO Live event before transitioning support to Accela Technical Services. Additional details may be found under the Post Go Live Support and Transition to Customer Support section of Appendix D: Accela Methodology.

## TRAINING COURSES

Accela will provide the following standard training courses for the project. All training courses have a maximum of 15 participants.

| Training | Description | Suggested Participants |
|---|---|---|
| Core Team Training<br><br>Delivered by Services | This course is an overview of the Accela Civic Platform to help agency personnel become familiar with the basic terminology, system navigation, and core functionality of the Civic Platform. Attendees will learn the Civic Platform best practices, explore design concepts, learn of advanced configuration and automation options.  It is recommended this course be taken prior to the analysis and system requirement gathering sessions with Accela Consulting personnel. | Core Project Team: Project Manager, department leads and key IT resources |
| Civic Platform Records and Mobile Administration<br><br>Provided by Accela University (public) | This course prepares agency administrators to build and maintain all facets of record type configuration within the Civic Platform.  Administrators will learn basic and advanced configuration options for associated record components and be able to successfully build fully functioning record types from setup to deployment in the Civic Platform, Citizen Access and Accela Mobile per agency business requirements. | System Administrators, IT Maintenance and Operations |
| Citizen Access Administration<br><br>Provided by Accela University (public) | This course prepares agency administrators to configure and maintain Citizen Access for your agency. You will learn how and when to use the Citizen Access administrator tools to manage global, feature, registration, and module specific settings.  You will learn how to control public user access to different types of data based on role permissions.  You will be able to deploy records and create page flows for customers to submit applications online as well as schedule or request inspections.  Participants will also learn how to edit all Citizen Access pages and use Brand Builder to manage the look and feel of the site. | System Administrators, IT Maintenance and Operations |
| GIS Administration<br><br>Provided by Accela University (public) | This course is designed to prepare agency administrators to configure and maintain Accela JavaScript GIS maps in the Civic Platform and Citizen Access. You will learn to use the GIS Admin tool for setup and connection to your existing map service. You will be able to build map profiles consisting of map services, geocoding, routing, and custom base maps. You will learn to create AA and ACA integrations and customize your map users experience with map groups.  You will | Esri Admins |

| | be able to setup and configure optional items such as XAPO, Dynamic Themes, Custom Widgets, and Hotlinks. | |
|---|---|---|
| Two (2) Ad Hoc Reports<br><br>Provided by Accela University (public) | This course is designed to prepare agency report writers 4with the skills and knowledge to use the Ad Hoc tool to prepare, manage and deploy low to medium level reports. Learn how to use report tools to design and develop reports and create sub-reports. Learn to deploy reports in hundreds of places throughout the Civic Platform and ACA. Practice creating expressions to concatenate or calculate at the field level. Discover how to use the form designer to create forms and letters. | Business SME |
| SSRS Reports<br><br>Provided by Accela University (public) | Participants will receive instruction in designing reports, connecting to custom data, creating custom formulas, and accepting user input through parameters. Additionally, participants will receive instruction in creating reports to show workflow, workflow history, associated people, and related record information. Finally, the training will conclude with instruction in the creation of a report showing the results of an inspection. The report will show details of inspection results, guide-sheet, and guide-sheet items associated with the inspection. | IT Report Writers |
| Two (2) Train - the – Trainer | This course is designed to certify agency trainers/super-users knowledge and understanding of their unique instance of the Civic Platform and associated components. Course places special emphasis on the following areas: Civic Platform and Citizen Access overview, user groups and hierarchies, data types and search, task assignments and filters, records, record functionality, fees and payments, processing records, working with inspections, Accela maps/GIS, Citizen Access, End-user training resources available in Accela University. Course experience will include demonstration using select agency records, hands-on exercises and participant testing. Course experience is designed to be completed within 24 hours of instruction but can be extended upon request or in special circumstances where additional record types with special complexity may require additional hours of instruction. Introductory Civic Platform courses that teach Accela functionality (not agency-specific) are available to all agency end-users for free on the University. | Staff that will be responsible for training your end users |

# APPENDIX C: CUSTOMIZATION

## AUTOMATION

During the Tailoring process, Accela and the Agency will identify opportunities to supplement the Accela Civic Platform base functionality via scripting to validate and automate business processes.

Automation is time boxed at **(800) hours.** These hours include time for initial automation estimation, analysis, design specifications, development, unit testing and QA. The team will document the process for managing to the time budget in the Project Management Plan.

Below provides the different complexity types and an average of how many hours each takes.

- Very High Complexity – Exports, imports, complex batches. Average 60+ hours.
    - Batch import of valid State licenses for contractors
- High Complexity – batch scripts (e.g., license expiration notice), page flow scripts. Average 40 hours.
- Medium Complexity – event scripts (e.g., auto-assign inspections, populating custom fields from GIS, placing a condition on a record based on custom fields and/or GIS data elements), pre- and post-scripts, and scripting expressions (non-wizard based). Average 16 hours.
- Low Complexity – configurable scripts, wizard-based expressions. Average 4 hours.

## CUSTOM REPORTS

The project timeline assumes the following custom reports will be developed.
- **Zero (0)** Very High Complexity Report - High complexity reports that may include the following: multiple layouts, large number of fields, multiple headers, footers, and page breaks.
- **Five (5)** High Complexity Report – Reports that require complex queries, joins, multiple sources, etc. Examples include statistical and analytical reports, schedules, and agendas.
- **Ten (10)** Medium Complexity Reports - Reports that require some calculations and summaries. Examples include forms and transaction reports (receipts, permits, inspection tickets, journals, logs). Many agency reports fall under this category.
- **Ten (10)** Low Complexity Reports - Reports that require a simple pull from a limited number of database fields and presentation on a document. Examples include letters such as Certificates of Occupancy, notices, and mailing labels.

Changes to the report specifications after approval can negatively impact project progress and the overall schedule.

If the Agency chooses to modify a standard report, this will require custom report development and will be assigned to one of the report complexities above based on the changes requested.

## INTEGRATIONS

For each integration, Accela will work with Agency's technical and business leads to document the functional and technical requirements of the integration. Results will be captured in an Interface Specifications Document. Interface development begins upon written approval of the specifications. It is expected that all interfaces will use Accela's Construct API, web services or batch engine. No custom or third-party integration tool will be used to accomplish input or output of data to/from the Accela system. In other words, data coming into Accela and data coming from Accela will use the existing integration technology. Agency responsibility includes obtaining permission for level/type of integration from appropriate application owners (including on premises or cloud/hosted, etc.). Further, the Agency will ensure that Accela resources have access to a Dev or Test version of the 3rd party system for interface development. All interfaces will be developed against one (1), agreed upon version of the 3rd party system.

| Integration | Method | Ownership |
|---|---|---|
| **Phase 1** | | |
| **Online payment processor** | custom integration | Accela |
| **Oracle Fusion Cloud - Financials Management** | Batch Two-Way to share transaction and payment information | Shared (Accela and City/3rd Party Vendor) |
| **ESRI – Feed CIP Projects and Private Development from Accela to ESRI** | **Two**-way integration from Accela to ESRI to provide CIP Projects and Private Development projects | Shared (Accela and City/3rd Party Vendor) |
| **ePermitHub – Plan Review/document markup** | Automation – ePermitHub adapter | Shared (Accela and City/3rd Party Vendor) |
| **Broward County Property Appraiser** | APO feed, feed back to County. Need to understand how it is done today | Shared (Accela and City/3rd Party Vendor) |
| **PHASE 2** | | |
| **Legistar Batch Job** | Batch job that creates an individual case report for cases with a processing flag set. | Accela |
| **Gridics – Present permit data on Gridics maps** | Ability for Gridics to query for information against Accela's ERD | City or 3rd party. Accela provide ERD access |
| **Laserfiche – Document Storage** | Automation One-Way – Construct API | Shared (Accela and City/3rd Party Vendor) |
| **Rock Solid – 311 Integration** | Automation Two-Way (Rock Solid API Out; Construct API In) | Shared (Accela and City/3rd Party Vendor) |
| **Granicus - Noise Complaints** | Automation Two-Way (Granicus API Out; Construct API In) | Shared (Accela and City/3rd Party Vendor) |
| **IVR - Cisco: Inspection request scheduling and results** | Adapter | Shared (Accela and City/3rd Party Vendor) |

## DATA CONVERSION

One of the most challenging aspects of the implementation of a new software system is data conversion. The legacy system will have features and functions not found in the new system, maintain the data

differently than the new system, and the overall user experience will not be the same. The data conversion process will take the data from the legacy system and extract it in a manner that will be useable for the new system. This iterative process will take place for the following data source(s):

- BCLA – Building C ode Lien Applications (Single database repository)

Accela will provide office hours to support data mapping and scripting activities, up to **eighty (80) hours**.

Accela conducts mini-mock conversion runs throughout the project to support our implementation methodology. The mini-mock runs are done in a dedicated conversion environment (CIVCON). In addition to the iterative mini-mock runs, Accela will load up to four (4) Mock Runs into a Non-Production environment, in addition to one (1) Final Go-Live Production Run. The 4 mock runs may be used as follows, but are up to the discretion of the project team: 1 during Development, 1 to support System Test, and 2 to support User Acceptance Test.

# APPENDIX D: ACCELA METHODOLOGY

This Appendix further defines the specific activities, outputs, and roles/responsibilities for the four stages: Define, Refine, Develop, and Deploy.

As depicted below, the first (Define) and last (Deploy) stages of project delivery flow in a linear direction. The second (Refine) and third (Develop) stages have an incremental approach to deployment based on the record groupings.

During the Refine and Develop stages, the solution scope is approached incrementally in distinct groups of record types. The team will group the Agency's solutions based on similar processes. Each group will move through the Refine and Develop Stages in an iterative manner to identify tailoring, update configuration and demonstrate the updated solution. The key component of the methodology is having the Agency see their solution come together. Each group will undergo Refine and Develop tasks and culminate in a Conference Room Checkpoint that will demonstrate an end-to-end working solution for a representative sample of records.

## DEFINE

The Define Stage sets the plan and foundation for the Agency's Accela Civic Platform implementation. The stage will be initiated once the parties execute all contract documents. This stage defines how the project will be managed throughout its lifecycle. Accela will provide the Agency with a Project Management Plan which documents key disciplines, processes, and standards for how the project will be managed from roles and responsibilities to risk management. Accela and Agency will collaborate on a Project Schedule to define the tasks with durations and resource assignments. Accela will provide a SharePoint site as the primary repository for tracking all project related documentation, issues, and risks. Accela will provision the Agency's non-production environments and install the subscribed Civic Application Solution.

### PROJECT INITIATION

Prior to the formal project kickoff, a series of pre-kickoff activities will occur. The Accela and Agency Project Managers, along with key staff, will meet to confirm alignment between the parties prior to starting the process. Meetings will include a review of the overall approach and methodology, discussion of expectations, and commencing the detailed planning activities.

Accela will review with the Agency the subscribed solution inventory through a facilitated orientation workshop. The Solution Inventory illustrates the Agency's subscribed Civic Application solution by mapping the Agency's record types to Accela Civic Application features. Accela will further categorize the record types into logical groups (Solution Groups) based on similar functions. The Solution Inventory is used as the basis for solution change control and workshop scheduling.

The following staff will be included in the pre-kickoff activities.

Agency Staff:
- Agency Project Sponsor
- Project Manager

Proprietary and Confidential

- Organization Change Manager

Accela Staff:
- Regional Director
- Project Manager
- Solution Architect
- Implementation Lead

Accela Responsibilities:
- Communicate the Accela Implementation Methodology
- Create the project SharePoint site and provide access to the Accela and Agency teams.
- Review and begin elaborating the project schedule and project management plan.
- Facilitate Solution Inventory orientation workshop and determine solution groupings.

Agency Responsibilities:
- Provide timely and appropriate responses to Accela's requests for project planning input and meeting logistics requests.
- Make available the appropriate key Agency users for the review.
- Confirm adherence to the Accela Implementation Methodology.
- Participate in the Solution Inventory orientation workshop.
- Gather and provide the following:
  - Paper applications
  - Fee schedules
  - Inspection checklists, inspection types and results
  - Communication standards (if applicable)
  - License and Conditional License samples
  - Letterhead sample
  - User list (including email addresses and department)
  - Sample Warning Letter
  - Sample Revocation/Suspension Letter
  - Merchant Account information (if applicable)
  - Hearing Calendars (if applicable)

## PROJECT SCHEDULE

The purpose of this activity is to jointly elaborate the project schedule to enable the parties' management teams to drive and monitor progress throughout the implementation. Agency and Accela will review their responsibilities before work begins (prior to commencing the Refine Stage) to ensure tasks can be satisfactorily completed in the agreed upon timeframe and the appropriate resources will be made available. It's assumed the Agency has committed to the involvement of key resources and subject matter experts for ongoing participation in all project activities of the agreed upon project schedule.

The project schedule is managed using Microsoft Project. The project schedule assumes timely completion of Agency-led activities and tasks, availability of key Agency resources, and collaboration and availability of any third-party vendor resources. Late (per mutually agreed project schedule) Agency tasks may adversely impact overall project timeline. Material delays impacting the critical path by more than 10 business days

of the baseline schedule are handled via the Change Control process defined in the Project Management Plan.

Output:
- Mutually agreed upon Project Schedule that will serve as the baseline schedule.

Accela Responsibilities:
- Finalize staffing for the Accela project team.
- Finalize the project schedule that includes duration and responsible party for all tasks (in cooperation with the Agency Project Manager).
- Maintain the schedule with input from the Agency PM and team members.

Agency Responsibilities:
- Provide input to tasks and duration in Project Schedule.
- Finalize staffing for the Agency project team. Guidelines and recommendations for the Agency project staffing are addressed in the Project Staffing section of this onboarding document.
- Review and commitment that tasks can be completed in the agreed upon timeframe and the appropriate resources will be made available.
- Sign-off on baseline Project Schedule.

## PROJECT MANAGEMENT PLAN

The Project Management Plan defines the management disciplines, processes, and standards the parties will adhere to during the project.

The following outputs are included:
- Project Management Plan – This document captures how the project will be managed covering disciplines such as change control, configuration management, quality assurance, and risk / issue management.
- Status Report Template – Accela will provide the Agency with a Weekly Status Report that outlines the tasks completed during the prior week, the upcoming tasks that need to be completed during the following week, a current version of the project schedule, risks that require mitigation, and a listing of any issues that may delay the project or jeopardize one or more of the production dates. The status report will be used for the on-going communication with the customer to ensure the Project teams are aware of the activities being completed and upcoming activities.
- Project Artifact Repository – Accela will provide Agency and Accela teams with a SharePoint repository to house project artifacts. Artifacts produced during the project use Accela based templates and the Accela methodology. There is no stated or implied promise that deliverables will be of a specified page length or comply with Agency formatting requirements.
- Governance Process and Committee Meetings – Established and scheduled, to include Accela participation.

Accela Responsibilities:
- Draft the Project Management Plan document (an Accela template) based on input from and collaboration with the Agency Project Manager.

- Finalize the Project Management Plan based on review comments from the Agency Project Manager.

Agency Responsibilities:
- Review the Project Management Plan.
- Provide timely and appropriate responses to Accela's requests for project planning input and meeting logistics requests.
- Make available the appropriate key Agency users for the review.
- Adherence to the Project Management Plan as a source document for managing the project.

## SOLUTION PROVISIONING

Accela will setup the Accela Civic Applications provisioned based on the Agency's subscribed solution and Solution Inventory. After setup, the Agency will be able to log into the system and verify that the software is available.

Accela Responsibilities:
- Provisioning of the subscribed Civic Applications in the hosted non-production development and test environments.

Agency Responsibilities:
- Validate that the subscribed solution is available.

## PROJECT KICKOFF MEETING

The final activity as part of the Define stage is a Project Kickoff Meeting with all key stakeholders.  This will include, but is not limited to, the Agency Project Sponsor, Accela and Agency Project Managers, and the implementation team members. The Kickoff Meeting is presented by both the Agency and Accela, and will cover topics such as project objectives, methodology and timeline.

Accela Responsibilities:
- Finalize Kickoff presentation.
- Co-Present with the Agency Project Sponsor and Project Manager on the project objective, methodology and timeline.

Agency Responsibilities:
- Provide input for the Kickoff presentation.
- Schedule and provide meeting facilities for Project Kickoff and other onsite activities.
- Co-Present with the Agency Project Sponsor and Project Manager on the project objective, methodology and timeline.

## REFINE

The Refine stage begins the knowledge transfer of the Accela Civic Platform and adoption of the new system.  This stage is where tailoring of the Civic Application for the Agency is performed.  Accela starts this stage with training the Agency's core team on the subscribed Accela solution, then conducts Civic Application Tailoring readiness sessions.  Following these sessions, the Tailoring Sessions begin, using the Accela Civic Application non-production system real-time review of the provisioned Solution Inventory,

reviewing each Solution Group incrementally. During the sessions, Accela will demonstrate the Civic Application solution components that pertain to the Agency's application/record type(s), identify areas available for tailoring based on Appendix A, and make real-time tailoring updates as appropriate. As the Tailoring Sessions continue for additional application/record types, the Accela team will evaluate points of integration and collaborate with the Agency on the concept design for these integration points. During the Refine stage the Accela team will also orient the Agency to the legacy data mapping tool, Accela schema, and associated activities. Upon accepting the configuration of each grouping, the Agency and Accela team will conduct a Conference Room Checkpoint where Agency stakeholders will be invited to an overview of the system at this point in the project.

## CORE TEAM TRAINING

Accela will provide remote instructor-led training for Agency core onboarding team members that focuses on the basic system navigation and tailoring components of the subscribed Civic Application solution. This training is an essential component to project success. Agency staff involved in the tailoring, testing, and validation of the solution must be trained prior to the tailoring sessions. This training will help the Agency onboarding team understand a high-level of the following:

- Basic system navigation of the Civic Platform
- Searching, creating, and processing records
- Reviewing tailoring components such as contacts, documents, and inspections
- Review of the Citizen Access portal

Accela Responsibilities:

- Coordinate with Agency and schedule the appropriate day/time and confirm the Civic Platform Core Training content outlined in the provided agenda.
- Provide remote Civic Platform Core Training.
- Provide Agency access to the Accela Learning Management System (LMS), provide instruction on how to register and login, along with how to search for and find the online training content.

Agency Responsibilities:

- Select and prepare the onboarding team members who will participate in the training.
- Schedule appropriate Agency staff participants and meeting locations for training activities.
- Provide instructions on accessing the Accela LMS to the staff users who will require the online training content.
- Ensure that users have appropriate hardware/software for successfully viewing online video content.

## ACCELA GIS CONFIGURATION

Accela will configure Accela GIS (JavaScript) to link and leverage existing Agency GIS information, including assistance with integrating map services with Accela GIS. The following are the main objectives being pursued through the implementation of the Accela GIS:

- Look up permit information and parcel information from the Civic Platform.
- View selection, location, and associated GIS information.
- Select one or more parcels and add new applications to the Civic Platform.
- Auto-populate spatial attributes for a property in forms (including Accela Citizen Access).

Accela's technical staff will work with Agency IT staff to ensure that the components for hardware, software, database, network, and internet are in place for the Agency's GIS services are available for Accela to consume. Accela technical staff will validate the proper configuration of the Accela GIS environment.

Accela Responsibilities:
- Configure Accela GIS and perform quality assurance checks on the configuration and performance.
- Demonstrate that the Accela GIS application is operational via successful communication between Accela Civic Platform and the Agency's ArcGIS.

Agency Responsibilities:
- Arrange for the availability of appropriate staff for the system setup, testing, and quality assurance throughout the configuration process.
- Order and procure necessary hardware, non-Accela systems software, and networking infrastructure as specified by Accela.
- Prepare the hardware, software, and network in accordance with the specifications provided by Accela.
- Provide people and physical resources based on the dates outlined in the project schedule.
- Provide Accela with network access to ArcGIS service, or the public link.
- Provide information and data in the formats specified by Accela that will be needed for the GIS implementation.
- Test each GIS integration to ensure that it is configured and functioning.
- Agency staff must review and test the integration and provide feedback to Accela Delivery based on the agreed upon project schedule timeline.

## ACCELA SOLUTION TAILORING
Following the core team training, the team will begin tailoring the Agency's Civic Application Solution. Please refer to Appendix B for the estimated tailoring.  Throughout the sessions, Agency staff will continue to learn how the Civic Application features are mapped to Agency record types and to their end-to-end processes.

## TAILORING ORIENTATION
Prior to conducting the individual tailoring sessions, Accela will conduct a 1-day orientation.  The key Agency staff that will participate in the sessions will all attend the orientation.  During this session, Accela will:
- Review dates and times of all sessions, as well as required participants
- Describe expectations of the sessions and the format/agenda
- Review Appendix A (Solution Inventory), B (Tailoring Framework) and C (Customization)
- Review roles and responsibilities of the sessions and final goal (conference room checkpoint)

### TAILORING SESSIONS
Based on the record groupings identified at the start of the project, Accela will schedule tailoring sessions with agency personnel to review the records in each group.  As the records are reviewed, the agency and Accella will review and tailor the solution components.

Tailoring sessions for each group generally cover the following topics:
- Review workflow(s) for records within the grouping
- Review Intake in public portal (Citizen Access) to validate items such as data elements, documents, disclaimer, and fees
- Review Intake from back-office (Civic Platform) to validate items such as data elements, documents, and fees
- Review agency level configuration of user groups and calendars

Sessions adhere to the following format:
- Accela and Agency teams will review the Accela Civic solution during the session, focusing on areas where solution tailoring is available (refer to Appendix B for the Tailoring Framework).
- For records that will be custom-built, Accela and Agency teams will review a similar record during the session and identify the configuration needs for the custom process (refer to Appendix C).
- Accela will take note of the tailoring requests during the sessions.  As much possible, Accela will make real-time updates in the session.  All remaining updates will be completed after the session.

It is imperative that the above process occurs within the Project Schedule timeframes to not delay subsequent activities and stages.  Agency must commit all necessary SME's and IT personnel for the appropriate sessions as outlined by the Accela and Agency Project Managers.

Output:
- Solution Tailoring Sessions
- Document the Tailoring Punch List (items unresolved during the sessions to be closed prior to or during the subsequent Agency validation period)

Accela Responsibilities:
- Facilitate solution tailoring sessions per the agreed project schedule.
- Update solution configuration based on session decisions.

Agency Responsibilities:
- Designate and authorize the Responsible Expert for each session / record group who will make decisions and represent the department/business.
- Make available the appropriate Agency key users and content experts to provide required information, participate in the sessions and verify the accuracy of the tailored configuration.
- Provide any documentation requested by Accela, including fee schedules; commonly used applications, reports and forms; and other relevant information.
- Schedule participants and meeting locations for session activities.
- Provide three to five Agency SMEs to test/review/confirm the tailored system prior to moving to the next scheduled project activity.

**FINALIZATION AND CONFERENCE ROOM CHECKPOINTS**

The purpose of the Finalization period for each grouping is to work down the open configuration gaps (the Tailoring Punch List – those items remaining after the Tailoring sessions), driving closure of the Tailoring activity for each group. The Finalization period is time-boxed (as defined in the Project Schedule) and requires dedicated time from the Agency and Accela project teams to rapidly close the open gaps for each

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grouping. New items identified during the Finalization outside of the Punch List must be completed within the established time box for the Finalization period. If the new item cannot be completed within the established time box, the Change Control process is triggered.

When the Tailoring Punch List is resolved, this denotes finalization of the solution configuration.

To promote information sharing outside of the day-to-day project team and following the Finalization period, Accela and the Agency jointly conduct a Conference Room Checkpoint meeting. In this meeting the Agency's Responsible Expert will demonstrate the work-in-progress software to key stakeholders. The demonstration will cover 1-3 record types that demonstrate the solution from end-to-end.

Finalization expectations:
- Accela will run a Configuration Report from the Civic Platform showing the details of the record's tailored configuration.
- The Agency team will review, test and confirm the tailored solution, enabling the teams to move to the next scheduled project activity.
- Solution changes (requests for configuration or customization outside the available solution tailoring framework) are deferred for review as per the Change Control process defined in the Project Management Plan.

Conference Room Checkpoint expectations:
- Accela will collaborate with the Agency users to select scenarios that should be demonstrated to peers and executive sponsors in a Conference Room Checkpoint meeting.
- Agency staff will lead a Conference Room Checkpoint meeting, up to 1 day per record group, to demonstrate the completed solution configuration to peers and executive sponsors.
- Once the Conference Room Checkpoint is conducted and confirmed, the teams will move to the next scheduled project activity.

Output:
- Finalized tailored solution ready for the Develop stage

Accela Responsibilities:
- Close out agreed upon action items from the Punch List to support the Finalization of each grouping.
- Assist the Agency's Responsible Expert in identifying a scenario to support the Conference Room Checkpoint for each grouping.
- Produce the Detailed Configuration Report for all records within the grouping.

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 an effort to learn about the system (knowledge transfer).
- Agency tests and confirms that the identified configuration Punch List items from the Tailoring sessions have been completed.
- The Agency (Responsible Expert) will facilitate the Conference Room Checkpoint.

If enhancements or new requirements are introduced during Conference Room Checkpoints, they will be managed by both project managers.

## AUTOMATION INVENTORY

The Accela team will work with the Agency identify the automation required as part of the implementation, and prioritize per scope in Appendix C. Accela will document an inventory of the automation, which will be the final list used for development.

## REPORT INVENTORY

The Civic Application solution includes a set of pre-built standard reports and documents. During the tailoring sessions, the Accela team will identify the reports provided as part of the subscribed Civic Application Solution. Any report identified that is not included in the Civic Application solution is considered a custom report. Accela will assist the Agency to document a Report Inventory of the system outputs needed to support the production system, including but not limited to, reports, forms, documents, notices, and letters that the Agency wishes to print as identified during tailoring sessions.

The purpose of the Report Inventory list is to document the Agency's reporting needs known at this time, and based on the scope in Appendix C, assign which reports the Agency wants Accela to own and develop. The inventory list can grow throughout the project, but any reports outside the scope of Accela would be owned by the Agency.

Accela Responsibilities
- Map agency report needs to the reports available within the subscribed Civic Application Solution.
- Perform standard/minor branding updates (e.g., Agency logo and contact information) for Agency's subscribed solution reports.
- Prepare/validate the standard report(s) for the group of records with the Agency.
- Document a Report Inventory of the Agency system output needs. This inventory will be in the format of a list only.

Agency Responsibilities
- Make available the appropriate key Agency users and content experts to participate in creating the report inventory.
- Provide Accela standard branding information (e.g., Agency logo and contact information) for all standard reports.
- For any custom reports identified, capture the custom report criteria and layouts.
- Participate in the demonstration of the scenario from Refine stage and review the configurable reports included in the subscribed solution.

## REPORT SPECIFICATIONS

Based on the scope of reports identified in Appendix C (Customization) Accela will work with the Agency to document report specifications for each. The Agency is responsible for providing a mockup (sample report) of what the desired report should look like from the new system.

Accela Responsibilities
- Document the Report Specification for each report in Appendix C.
- Finalize each Report Specification based on one round of feedback from the Agency.

Agency Responsibilities
- For each custom report identified, provide Accela the custom report criteria and layout.
- Provide to Accela a sample mockup of each report, as expected from the Accela Civic Platform.
- Review each Report Specification and provide one round of review comments to Accela.
- Review and approve the final Report Specification to validate the comments are incorporated.

## INTEGRATION SPECIFICATIONS
Accela is responsible for the integrations on the Accela Civic Platform, with the Agency being responsible for the coordination and development of changes made to the 3rd party system.

Prior to development, Accela will work with the Agency to document integration specifications for each. Changes to the integration specifications after approval can negatively impact project progress and the overall schedule.

Accela Responsibilities:
- Conduct integration design sessions to review the interfaces in scope.
- Document the Integration Specification document for each integration in Appendix C.
- Finalize each Integration Specification based on one round of feedback from the Agency.

Agency Responsibilities:
- Make available the appropriate key users and system experts to participate in the integration analysis and validation activities.
- Review each Integration Specification document and provide one round of feedback.
- Review and approve the final Integration Specification document to validate the comments are incorporated.
- Provide links and credentials for third party systems.
- Handle all coordination with 3rd party vendors including review of specifications if deemed required.

## DEVELOP

The Develop stage takes the group of processes (records) from the Refine Stage and continues the process for building and unit testing the solution which will include integrations, running mock run -conversion activities, and functional testing of data conversion efforts (or dry runs for the production).

The subscribed Civic Application Solution includes pre-defined business process automation/validation. For example, common business rules are included such as sending an email to an applicant when a record is submitted and preventing record issuance when a balance is due.  If custom automation is defined in the scope, these components are built and unit tested during the Develop stage.

Another series of Conference Room Checkpoints will be conducted upon completing development for each grouping.

## AUTOMATION DEVELOPMENT

In this step of the process, the automation identified during the Refine stage is developed and tested. Automation will be developed per record grouping and demonstrated in the Final Conference Room Checkpoint for that grouping.

Accela Responsibilities:
- Develop and unit test automation per user stories documented in the Automation Inventory.

Agency Responsibilities:
- Test automation to ensure it is built and functioning per the approved user stories.
- Make available the appropriate key users and content experts to participate in the development and validation activities.

## REPORT DEVELOPMENT

In this step of the process, the report specifications finalized during the Refine stage are developed. Reports will be developed per record grouping and demonstrated in the Final Conference Room Checkpoint for that grouping.

Accela Responsibilities:
- Develop and unit test custom reports per signed specifications.
- Provide one round of defect resolution following agency review period.

Agency Responsibilities:
- Make available the appropriate key users and content experts to participate in the report development and validation activities.
- Test each report to ensure it is built and functioning per signed specification and provide one round of feedback.
- Review and approve each report to validate the comments are incorporated.

## INTEGRATION DEVELOPMENT

It is expected all integrations will use Accela's Construct API, web services or batch engine. No custom or third-party integration tool will be used to accomplish input or output of data to/from the Accela system. In other words, data coming into Accela and data coming from Accela will use the existing integration technology. Agency is responsible for gaining appropriate system access to support the integration from appropriate application owners (including on premises or cloud/hosted, etc.) and handling all coordination with 3rd party vendors. All integrations will be developed against one (1) agreed upon version of the 3rd party system.

Accela Responsibilities:
- Develop and unit test integration per signed specifications.
- Provide completed and demonstrate working interface.
- Perform knowledge transfer to agency administrator.
- Provide one round of defect resolution following agency review period.
- Assist agency in deployment to one environment.
- Provide source code for interface to Agency at conclusion of project.

Agency Responsibilities:
- Make available the appropriate key users and system experts to participate in the integration development and validation activities.
- Test each integration to ensure it is built and functioning per signed specification and provide one round of feedback.
- Review and approve each integration to validate the comments are incorporated.
- Provide links and credentials for third party systems.
- Handle all coordination with 3rd party vendors including 3rd party licensing, and end to end testing between Accela Civic Platform and 3rd party system.
- Updates to interface, post go-live, due to changes in 3rd party system or Agency business processes.

## DATA CONVERSION

Converting historic/legacy data from the Agency's systems is a critical activity for the success of this project. Accela's data conversion methodology is an iterative process, starting early in the project and ensuring the Agency sees data frequently during the development activities. Accela provides a separate Conversion environment (CIVCON), in addition to the Agency's non-production environments. The Conversion environment will be a fully functional environment and will mirror the Agency's configuration, without impacting the non-production environments.

The image below demonstrates Accela's iterative approach to data conversion. Throughout the development cycle, the team will conduct mini-mock runs based on conversion work completed up to that point. For each mini-mock run, the project team will execute the steps outlined within the box. This is an iterative and cumulative process, where each mini-mock builds upon the next. Each mini-mock run will be executed in a Conversion Environment (CIVCON) where the Agency will verify the data and ensure processing of the converted records. It is critical the Agency is involved in this verification testing in order to resolve issues early in the process. The data migrated during mini-mock runs will also be used to support Conference Room Checkpoints (described in the next step of this Appendix).

In addition to the mini-mock runs, Accela will conduct mock runs as well as the final go-live run. The mock runs will be loaded into a targeted non-production environment and the go-live run will be loaded into the production environment. Please refer to Appendix C – Data Conversion for how many runs into a non-prod/prod environment are in scope.

**Data Conversion Initialization**
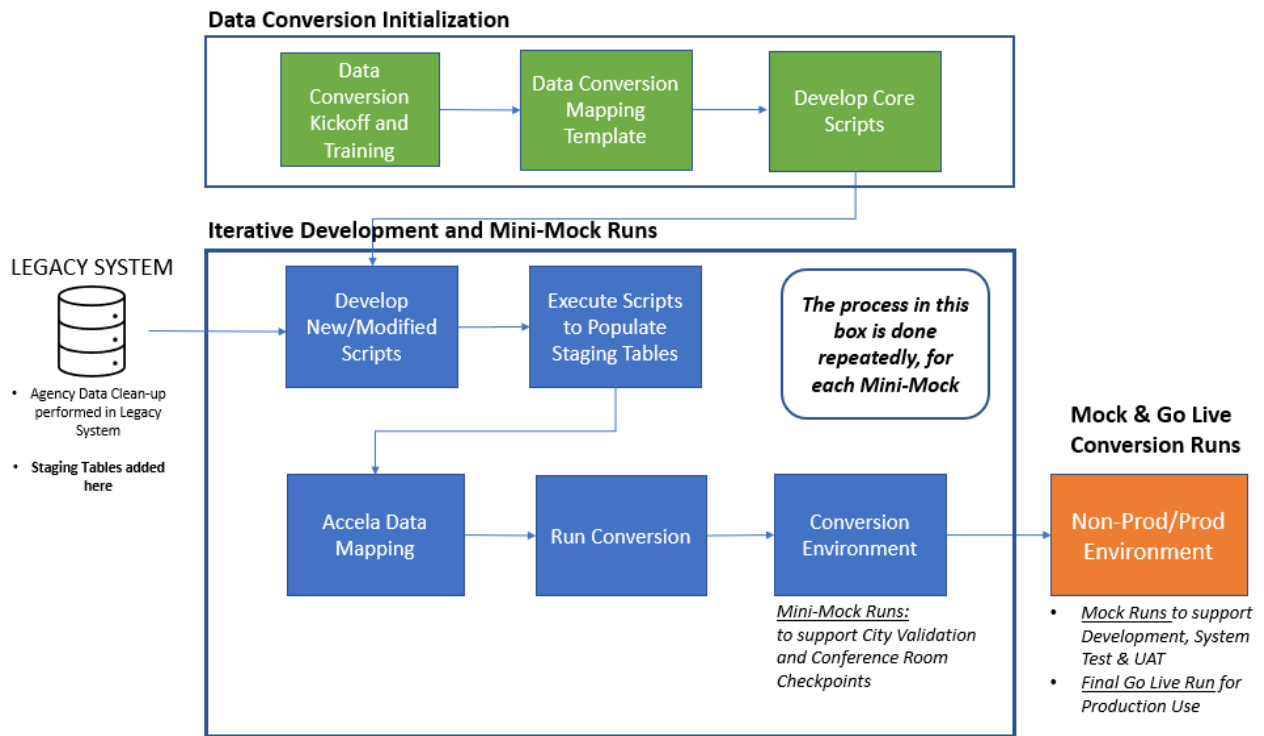


During project startup activities, Accela will train the Agency on our Data Conversion mapping tool.  The Agency will be responsible for data extraction, data mapping, data cleansing and data integrity.  It is critical that the Agency, specifically the business users, provide ample time to test the data conversion and ensure processing of converted records.

**AGENCY ROLES**
1. Legacy Database SME (per data source)
2. Developer (writes extraction scripts, and QAs the migrated data)
3. Business SME (needs to know Accela configured solution; does not require knowledge of Accela database schema; also QAs the migrated data)

The following describes a high-level of each step in the above image.

**DATA CONVERSION INITIALIZATION**
1. Data Conversion Kickoff and Training
   a. Accela will conduct meetings to provide the Agency conversion resources a copy of the Accela Conversion Tools and install Accela's staging tables on the legacy system.  The staging tables are a flattened and abbreviated version of the Accela schema.
   b. It is highly encouraged that the Agency begin data cleanup of the legacy database as early as possible.  This will help streamline efforts later by increasing data integrity and reducing the need for additional scripts pre/post conversion.
2. Data Conversion Mapping Template
   a. Accela will work with the Agency to complete the Data Conversion Mapping Template (DCMT) which is a spreadsheet containing a tab for each of the staging tables.  This

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spreadsheet documents which tables and columns in the legacy system will be inserted into the staging tables and columns. This activity will be done over a series of meetings between the Accela Data Conversion resource and an Agency Database SME. This is a one-time activity that can be done early in the project, even before configuration is completed.

3. Develop Core Scripts
   a. Scripts are required to populate the legacy data into the staging tables. Core scripts are developed to satisfy each tab of the DCMT completed above. Accela will lead the Agency in completing a couple examples and then support the Agency in completing the remaining scripts.
   b. At this point, Accela will begin developing a Conversion Run Book which will be used as the set of instructions to run conversion later in the process. The instructions may include when to run each script and any parameters required to run a given script. As the Agency completes scripts, they will also update the Run Book regarding these instructions.

## ITERATIVE DEVELOPMENT AND MINI-MOCK RUNS
The steps that follow are repeated for each mini-mock run. Each run builds upon the prior one, so it is a cumulative process.

4. Develop New/Modified Scripts
   a. For each new set of records to be part of a mini-mock run, the team will evaluate the Core Scripts and what has already been developed for prior records. The team will establish requirements for the new records and then develop new or update existing scripts. These scripts will include custom fields and custom lists, at minimum. The Agency will develop these scripts, with Accela's support.
   b. The Agency may also develop scripts here to define additional data cleanup that can be done prior to conversion runs and/or post conversion runs.
   c. As any scripts are completed, they must be saved to a shared repository and instructions must be added to the Run Book.
5. Execute Scripts to Populate Staging Tables
   a. The Agency will execute the scripts developed in the prior step to populate the legacy data into the staging tables.
   b. Note: Scripts can be executed as they are completed (do not need to wait for all scripts to be completed for a given run).
6. Accela Data Mapping
   a. As part of the first mini-mock run activities, Accela will provide training on the Accela Data Mapping Tool to the Agency conversion resources. Accela's Data Mapping Tool is a means for the Agency to map data from the staging tables populated above (source) to the Accela configuration (target). The tool creates a set of translation tables (Mapping File) used later in the process to run the conversion program.
   b. The Agency Legacy Database SME along with an Agency Business SME (the SME part of the tailoring process) will complete the data mapping. Accela will support this activity as needed.
   c. Note: Mapping can be done as scripts are executed (do not need to wait for all scripts to be completed for a given run).
7. Run Conversion
   a. There are three (3) inputs to a conversion run, as performed in the above steps: Scripts, Staging Tables, and Mapping File.

      b. Prior to a conversion run, the Agency will provide Accela with the populated staging tables from the legacy database, as well as the completed Mapping File from above.

      c. Accela will run a conversion to the Conversion environment (CIVCON), leveraging the run book and Accela Conversion Tools.

8. Conversion Environment (CIVCON)

      a. As a result of the conversion run, the data lands in the Accela Schema.  Conversion runs are always first into a dedicated Conversion environment (CIVCON).  CIVCON will mirror the configuration completed to date.  The Agency is required to validate the data in CIVCON and ensure processing of converted records.

         i. Accela can provide a copy of the Accela Schema to assist in technical validation.

         ii. It is critical that the business users use CIVCON to perform functional testing and ensure processing of converted records.

      b. Mini-mock runs only go as far as this environment (i.e., mini-mock runs do not get loaded into non-prod or prod).  The mini-mock runs are done to support an iterative development and testing process and are also leveraged during the Develop Conference Room Checkpoints to demonstrate converted data as part of the solution built to date.

**MOCK & GO LIVE CONVERSION RUNS**

9. Non-Prod/Prod Environment

      a. If a conversion is targeted for load into a Non-Production or Production environment, it is taken a step further here to move the data from CIVCON to the targeted environment.  This is completed by Accela's Cloud Operations team.  Please refer to Appendix C – Data Conversion for how many runs are in scope.

         i. Mock Runs are loaded into a non-production environment.

         ii. The Go-Live Run is loaded into the production environment.

Accela Responsibilities
- Training on the Accela Data Conversion Mapping Tool.
- Training on the Accela Civic Solutions database schema.
- Manage the overall conversion timeline and methodology.
- Support the Agency in scripting and mapping activities.
- Run conversions using Accela Conversion Tools.
- Load mock run migrations and the final production load during production cutover.

Agency Responsibilities
- Data cleanup of Legacy data.
- Population of staging tables by developing and executing scripts.
- Completion of data mapping utilizing Accela's Data Mapping Tool.
- Conduct technical validation / unit testing of the conversion.  Technical validation should be performed in the staging tables and in the conversion environment.
- Conduct business user testing to ensure converted records can be processed.  User testing should be performed in the conversion environment following mini-mock runs, and in the non-prod environments following mock runs.

**General Information and Requirements for Data Conversion:**

- The Civic Application solution tailoring must be finalized before Accela will support the data conversion mapping effort.
- The standard data conversion includes the conversion of transactional data to the Accela database when a configured target 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.
- Conversion of transactional tables, Address/Parcel/Owner (APO) data, Professional License data is executed "As-is" from the staging area into Accela. "As-is" means that the data will be transformed as mapped to existing configuration elements in Accela. The conversion process will not create configuration data or alter the mapped data when processed into Accela. Additionally, this means if invalid, inaccurate, or incomplete data is provided, it will be loaded into Accela "As-Is". All data cleanup must occur prior to load from staging area into Accela.
- The standard document conversion may be utilized to convert record/permit level attached electronic documents into the configured Accela Document Service (ADS). In the event a 3rd party EDMS is used by Accela Civic solution, it is still possible to convert documents if the 3rd party integration supports the create method.
- At a minimum the electronic document(s) to be converted must exist in a Microsoft Windows accessible file system (e.g., NTFS, FAT32) and have the ability to identify the associated Record ID in order to be converted. In the event files exist in a database they must be extracted into a windows file system prior to being evaluated for conversion.

## DEVELOP CONFERENCE ROOM CHECKPOINTS

As items are completed throughout the Develop stage, the Agency will be responsible for testing items to ensure they function according to the scope above. Once development and unit testing for a group is completed, the Accela and Agency team will conduct a final Conference Room Checkpoint for each grouping.

The Agency would walk the participants through an actual scenario(s) where the record would be created in the Public Portal (ACA) and demonstrate the steps to record/application/permit closure. This walk through should support the additional components on top of configuration which include points of integration, business automation, reports, and a preliminary view of converted data (if applicable) based on the scenario. At the conclusion of the Conference Room Checkpoint, the Agency will accept the solution for the particular group, and this will allow for the exit criteria for the particular group.

If enhancements or new requirements are introduced during Conference Room Checkpoints, they will be managed through the Change Management process.

## ACCELA SYSTEM TESTING

System Test is performed by the Accela team. It is an end-to-end test to ensure that the solution is operational prior to going into User Acceptance Testing. It includes comprehensive testing.

Accela Responsibilities:
- Lead system test activities including testing the system using a sample of test cases provided by Agency
- Report status of system testing on what has been completed and if there are any open defects

Agency Responsibilities:
- Core team project members assist in testing the system at the Agency's discretion (Note: This is considered to be an Accela-led task)
- Provide a subset of the UAT test cases to be used by the Accela team for system testing

## DEPLOY

Deploy is the final stage of the Accela Implementation Methodology. The Deploy Stage starts when all components of the system are developed and unit tested (including all components developed by the Agency), and the system is ready for User Acceptance Testing (UAT).

The Agency will prepare for UAT by creating test cases and a test execution plan. Agency will lead the test activities by executing test cases to validate the system is performing processes as defined in the solution inventory. The Accela team will address Civic Application solution defects as they are identified. The Agency team will address defects associated with custom development (reports, integrations, etc.). At the completion of UAT, the Agency will conduct End User Training and the Agency and Accela will begin to prepare the cutover plan. Once training has completed, the cutover plan will be executed, and the Agency will Go-live on the Accela solution. Accela will provide post-production support to address bugs that are identified. The Accela team will then transition the Agency to the Accela Customer Support team for on-going support.

### TRAINING PLAN

Accela's approach follows a Train the Trainer approach to training. The Accela Trainer will train the Agency's designated trainer for each business area in the operations of functions in Accela. Accela training is focused on the use of the standard Civic Applications. The Agency will be responsible for training end users on how to use the system to accomplish agency-specific daily business activities. Customization of end user training material and end user training is also the responsibility of the Agency.

Accela will develop a Train the Trainer Plan. Agency will develop an End User training plan.

The Training Plan for trainers will include:
- An overview of the strategy for training for the solution.
- The training subject areas, audience, objectives, approach, and milestones.
- Definition of minimum competencies for Agency trainers and super users.
- Definition of components required, such as course outline, schedule, etc.
- High-level training schedule for all target audiences based on the logical sequence of how the content should be delivered, availability of the participants, and deployment timing.

Accela Responsibilities:
- Prepare Train the Trainer plan and material based on Accela standard Train the Trainer content/curriculum.

Agency Responsibilities:
- Prepare end user training plan and associated content.
- Make available the appropriate Agency resources to provide required information.

- Identify users who will participate in the Train the Trainer sessions and end user sessions.
- Schedule participants and meeting locations for training sessions.

## USER ACCEPTANCE TEST (UAT) PLAN

Accela will provide a Test Plan template to support the Agency's implementation.  Agency will amend the Test Plan based on the implementation.  The Test Plan will focus on the following:

- UAT process
- High-level plan/schedule to conduct UAT
- Who should participate?
- What should be tested?
- How to report an issue?
- Retesting issues that were fixed
- Sign-off

The Agency will review and jointly participate in updates to the Test Plan to include:

- Specific resource names
- Sign-off that resources have been adequately trained to execute test cases
- Process for entering requirements into Jira throughout the project to be used as a basis for testing and solution verification
- A list of test cases to be executed
- Detailed schedule of the test execution plan

It is critical that the Agency devote ample time and attention to the development of their test cases.  Accela recommends the Agency use this opportunity to update their Standard Operating Procedures (SOPs) and/or custom Training Materials and leverage these as test cases.  The Agency is responsible for creating and verifying all the test cases meet specific business needs.  Test cases should confirm record creation, automation, workflows, inspections, citizen access, reporting, etc. and any other specific integration or areas within Accela used in normal business.  Accela recommends Agency leverage SOPs as the basis of test cases.  Test cases must be validated by the Agency experts and within the scope of the Civic Applications and tailored configuration.  Based on the developed test cases, the Agency is responsible for staffing appropriately so that the UAT activities will fit into the agreed upon onboarding duration. At the conclusion of UAT, the Agency should identify which test cases should be used for future regression testing when upgrades are applied.  Accela recommends Test Cases form the basis for the Agency's ongoing Training and User Guides.

## USER ACCEPTANCE TESTING (UAT)

User Acceptance Testing is formal testing by the Agency to validate the system is working per the project scope.  Throughout the project, the Agency is expected to test components of the system as they are completed (i.e., configuration, reports, integrations, etc.).

Prior to UAT, the teams will establish a configuration and development code freeze on the test environment.  As all components should have already been tested and validated during the Define and Develop stages, UAT should focus on end-to-end testing of the Agency's full business processes as they would perform in production.

User Testing includes the following distinct phases:

1. Initial Test – a timeboxed phase where the Agency runs through every test script and logs all issues in the issue tracker (Jira).
2. Defect Remediation – a time for Accela to remediate all Critical and High implementation defects found during Initial Test or as mutually agreeable between both parties. As time allows the Agency is encouraged to troubleshoot all Medium and Low implementation defects, in preparation of taking ownership of the solution for post go live.
3. Remediation Testing **–** the phase where the Agency validates that all Critical and High implementation defects have been resolved.

The Agency will lead the UAT activities outlined in the UAT Plan. The Agency will test and validate the solution and its readiness to be migrated to production for active use. **All test cases should be completed prior to UAT.** At completion of the Initial Test, Accela and Agency will create a Punch List and agree to Critical and High implementation defects required for remediation before go-live. The Punch List then becomes the focus of remediation and remediation testing. The Punch List will contain implementation defects responsible by both Accela and the Agency, based on which party was responsible for the original configuration/development.

**It is critical that the Agency devote ample time and resources to this effort to ensure the system is operating per onboarding scope and ready for production. The testing effort will require a significant time investment by the Agency, and the commitment of resources is key to success.**

If the Agency does not devote adequate time and staffing to User Testing to completely test the solution, Accela may opt to postpone Go-live at the Agency's expense. Accela will work diligently with the 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. Additionally, if out of scope items are identified throughout testing, both project managers will mutually agree on how to handle them..

Accela will ensure the appropriate test environment to be used for User Testing is set up and ready prior to the start of testing activities. This should include deployment of the approved configuration, automation, reports, integrations, and a full mock run of converted data. The Agency will ensure the appropriate Agency and/or 3rd party test environments are available to support integrations.

Accela will provide support for User Testing by answering questions and resolving Critical and High defects that are within the scope of the onboarding services. Medium and Low defects should be resolved by the Agency as they are expected and encouraged to begin taking ownership of the solution in preparation for post go live. These updates should be closely coordinated between the Agency and Accela teams so that no unexpected issues or changes are introduced with the resolution of these Medium and Low defects. Requested changes to the system must be managed through the Change Management process and should not be treated as defects.

At this point in the implementation process, the Agency should test individual components of functionality of the solution (i.e., functional), and test to ensure that the interrelated parts of the Accela Automation solution are operating properly (i.e., integration testing).

Based on the UAT Duration table above, the high-level schedule of User Testing would be as follows:
- **Initial Test:** Agency to execute **all** User Testing test cases. During this phase, Accela and Agency will also begin resolving Critical and High implementation defects identified throughout the testing. At

the end of Initial Test, the Agency and Accela will develop and prioritize a User Testing Punch List to include open Critical and High severity implementation defects that are required for go-live, as defined in Appendix E.

- o The punch list must be finalized at the end of the Initial Test phase. Accela will export the current open Critical and High implementation defects from the User Testing issue tracker and review this with the Agency at the close of the phase. Only in-scope issues will be considered for punch list resolution. The Remediation Phase (punch list/defect resolution) will be delayed until the Agency and Accela agree upon the punch list. At this point the issue tracker is closed.
- o If the Agency has not completed execution of all their test cases at the end of the defined duration, then an extension to the project would be required.
- o **User Testing is a time-boxed activity,** so it is critical the Agency identifies all issues in the Initial Test timeframe. If the Agency identifies issues AFTER the Initial Test phase (i.e., after the Punch List is agreed upon), these issues would require an extension to the project.

- **Defect Remediation:** Accela will remediate, build, and implement configuration updates for the User Testing Punch List (Critical and High implementation defects)
- **Remediation Testing:** Agency will perform testing to confirm the Punch List items are resolved. This period is for retesting issues found during the initial test period. It is not for performing additional User Testing. New issues go to the parking lot. The User Testing is deemed accepted when Agency has verified the Punch List and severity of Critical and High implementation defects have been addressed. The accepted deliverable will become the configuration code set that will be deployed to the PROD environment.

Output:
- Upon acceptance of User Testing, a configuration and development freeze on TEST environment. This environment will be used to move to production.


Accela Responsibilities:
- Support the Agency in User Testing execution, remediation and retesting of Critical and High punch list implementation defects.


Agency Responsibilities:
- Identify resources who will participate in User Testing.
- Any Critical and High priority issues assigned to the Agency must be responded to in the SharePoint tracker within 3 business days. For example, additional information needed or the results of Agency retest.
- Ensure that testers are adequately trained on the system to accurately execute test cases.
- Lead and manage the User Testing effort, including resources and test execution schedule.
- Execute the User Testing test cases developed by the Agency during the User Testing test plan activities.
- Make available the appropriate key Agency users and content experts to participate in User Testing as defined and managed by the Agency.
- Resolve Medium and Low severity implementation defects related to tailored components.
- Determine which test cases will be used for ongoing regression testing.
- Leverage test cases as a basis for ongoing training and user guides.

## PRODUCTION CUTOVER "GO LIVE"

Production date is defined as the official date in which Accela Civic Platform moves from the test environment to production for daily Agency usage.  This date will be agreed to by both Accela and the Agency at project inception.  It may be altered only agreed to by both parties.  In the weeks prior to moving to Production, Accela will assist in final data conversions, system validation, staff preparation and training, and coordination of deployment.

Output:
- Deployment support prior to moving to Production.
- Assistance with setup of Integration points in Production.
- Final Conversion run during cutover.
- Accela Civic Platform used in Production environment for Agency daily use.

Accela Responsibilities:
- Lead the effort to transfer the system configuration and any required data from Test to Production.
- Lead development of a Go Live checklist that details the critical tasks that must be accomplished prior to moving to Production.

Agency Responsibilities:
- Provide technical and functional user support for pre and post Go Live planning, execution, and monitoring.
- Assist in the development of a Go Live checklist that details the critical tasks that must be accomplished prior to moving to Production.

## POST GO LIVE SUPPORT AND TRANSITION TO ACCELA SUPPORT

This deliverable comprises the post go-live support assistance that Accela will provide to address issues and provide consultative advice immediately following Go-Live. Accela will work with the Agency to address issues identified during this period using a Post Go-Live Issues list. This list will comprise issues related to the defined deliverables listed in the onboarding package. Examples of issues the Agency is responsible for include training issues, functional changes beyond the scope of the onboarding services, cosmetic changes, and procedures related to using Accela solutions. Accela will not be developing or creating additional reports, conversions, integrations, record types and workflow processes that were not included in the scope of this project during post deployment support.

Agency will take ownership of the production environment upon system go-live. To enable ownership of the production system, promote continued knowledge transfer, and provide the Agency with maximum flexibility to address not only high or critical defects not found during testing but also other desired incremental system changes, Accela will provide Tier 3 support to address issues and provide consultative advice. The Agency performs the functions of Tier 1 and Tier 2 support.

| Tier 1

Agency | Basic help desk resolution and service desk delivery | Support for basic customer issues such as solving usage problems and fulfilling service desk requests. | Lower-level technical personnel, trained to solve known problems and to fulfill service requests. |

| | | If no solution is available, tier 1 personnel escalate incidents to a higher tier. | |
|---|---|---|---|
| **Tier 2**<br><br>**Agency** | In-depth technical support | Experienced and knowledgeable technicians assess issues and provide solutions for problems that cannot be handled by tier 1.<br><br>If no solution is available, tier 2 support escalates the incident to tier 3. | Support personnel with deep knowledge of the product or service, but not necessarily the resources who designed and implemented the solution. |
| **Tier 3**<br><br>**Accela** | Expert product and service support | Access to the highest technical resources available for problem resolution or new feature creation.<br><br>Tier 3 technicians attempt to duplicate problems and define root causes.<br><br>Once a cause is identified, tier 3 will build a resolution or identify as a product defect and work with the Agency in submitting a ticket for it to be resolved by the product team. | Tier 3 specialists are generally the most highly skilled product specialists. |

One week prior to the end Accela's post go-live support period, the issue tracker will be closed for new issues. Accela will use the final week to complete resolution of the critical and high priority issues in the issue tracker. Any new issues identified during that final week will be the responsibility of the agency. Accela will be available for consultation during the final week.

A formal meeting will be scheduled with the Agency, Accela Services Team, and Accela Customer Support for the purpose of transitioning support of future issues and questions from the Agency to the Accela Customer Support program.

Output:
- Accela will provide support immediately following deployment (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.
- Finalized post-production copy of issues list.
- Transition of Agency from Services team to Customer Support for ongoing support.

Accela Responsibilities:
- Provide post-production support for Accela developed configuration and components. For example:
  - Assistance with new UI or browser settings since not every user has accessed the new version of our software.
  - Issue research.

o   Escalation of issues that can't easily be resolved.
- Assist with the identification of issues for the Post-Production Issues List.
- Assist with issues that may arise related to the deliverables in this onboarding package.
- Transfer ongoing support of the Agency to the Accela Customer Support program.

Agency Responsibilities:
- Provide technical and functional user support for post-production support and monitoring.
- Any Critical and High priority issues assigned to the Agency must be responded to in the SharePoint tracker within 3 business days. For example, additional information needed or the results of agency retest.
- Examples of issues the Agency is responsible for include: training issues, functional changes beyond the scope of this onboarding package, cosmetic changes, and procedures related to the use of Accela Civic Platform.
- Develop and maintain a Post-Production Issues List.

## CIVIC PLATFORM TRAIN-THE-TRAINER TRAINING

This course is intended to prepare identified Agency trainers to train their end users. Participants will first be taught the basic two-day end user course around the customer daily Civic Platform processes. Then participants will engage in workshop practice sessions where the students teach each other and the Accela instructor sections of the two-day end user course. Feedback will be given to help the customer trainers obtain the skills needed to effectively train their end users. By the end of this course, the Agency will have the ability to train your end users in Civic Platform functions.

Output:
- Train-The-Trainer for Civic Platform End-User Training

Accela Responsibilities:
- Coordinate with Agency to schedule the appropriate day/time to deliver the training.
- Coordinate with Accela PM and Agency to identify trainee list and create event registrations.
- Manage the pre- and post-training event communication to ensure trainee participation and awareness.

Agency Responsibilities:
- Notify Accela trainer of selection of up to 3 record-types for training demonstration and workshops.
- Provide Accela trainer with access to Agency workflow/business process SME no later than two weeks prior to the scheduled Train-the-trainer event.
- Ensure that trainees have appropriate hardware/software for successfully participating in the online training.
- Staff participants have successfully read and completed any recommended online course content.
- Participant maximum is 15 trainees.

# APPENDIX E: PROJECT RESOURCES

## AGENCY RESOURCES

The Agency must fill the following roles with the appropriate Agency Personnel that will work together with the Accela Project Team for the Project.  Agency will make available additional resources as needed for the Project to be successful.  Agency roles can be filled by the same person.  In addition, Agency will provide all necessary technical resources to make appropriate modifications within any Agency systems wishing to integrate with any Accela systems. These resources must be proficient in Agency coding/development environment and tools, to make the required changes to their software to enable integration and must be available during the timeframe of these Services.

| Agency Resources | FTE | Description |
|---|---|---|
| **Project Sponsor** | .15 | Responsibilities include:<br>• Represent the strategic and financial interests of the Agency within context of the project<br>• Create an environment that promotes project buy-in<br>• Stay informed and provide high-level oversight throughout the duration of the project<br>• Serve as the primary escalation point to address project issues and remove obstacles in a timely manner |
| **Steering Committee** | .15 | • Provide input to the development of the project, including the evaluation strategy;<br>• Provide advice on the budget;<br>• Define and help to achieve the project outcomes;<br>• Identify the priorities in the project – where the most energy should be directed;<br>• Identify potential risks;<br>• Monitor risks;<br>• Monitor timelines;<br>• Monitor the quality of the project as it develops;<br>• Advise (and sometimes making decisions) about changes to the project as it develops |
| **Project Manager** | 1.0 | Agency will provide a dedicated Project Manager throughout the course of the engagement.  Responsibilities include:<br>• Overall administration, coordination, communication, and decision-making associated with the implementation<br>• Plan, schedule, and track the implementation with Accela and across departments within the agency<br>• Primary responsibility for the coordinating and scheduling of Agency employees and facilities in support of project activities.<br>• Supervision of the Agency team members to ensure the project team stays focused, tasks are completed on schedule, and that the project stays on track |
| **Product/System Administrator** | 1.0 | • Participate in system configuration and build out as much as possible, working closely with Accela implementation team |

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| | | |
|---|---|---|
| | | • Assist Agency end users with testing<br>• Attend system administration training<br>• Post go-live, take over internal administration of Accela system |
| **Division/Departmental Business Leads** | 1.0 | A user representative for each affected department must be appointed to facilitate analysis and configuration and serve as a decision-making entity for that group.  These critical appointments may well determine the success of the implementation for their respective areas.<br><br>The designated Leads assist the Agency Project Manager in delegating project tasks, driving priorities for the department and ensuring action items are completed in a timely manner.<br><br>Responsibilities include:<br>• Attending tailoring sessions<br>• Willing and able to gather data and make decisions about business processes<br>• Assumes the Responsible Expert role for any record groupings assigned to the department<br>• Lead the Conference Room Checkpoints for the department record groups<br>• Participate in knowledge transfer opportunities in order to understand the solution |
| **Division/Departmental Subject Matter Expert (SME)** | 0.75 (per Department) through Design Phase<br><br>0.50 (per Department) for User Acceptance Testing | Responsibilities include:<br>• Being trained on the Accela system and proactively learning the system as it is implemented<br>• Being fully engaged in the sessions and system configuration activities<br>• Provide expertise in their business area<br>• Writing of test cases<br>• Assist internal efforts towards the creation of reports, integrations & conversions<br>• Review and testing of the solution<br>• Review and testing of the converted data<br>• Actively participate in the full implementation of the Accela solution |
| **Integration Developer** | | Responsibilities include: |

| | | |
|---|---|---|
| | | • Liaison between Accela and 3<sup>rd</sup> party providers<br>• Understand integration needs of Agency and build designs<br>• Write integration methods to meet the Agency requirements<br>• Participate in unit and system testing |
| **Report Developer** | .50 | Responsibilities include:<br>• Understanding reporting needs of Agency<br>• Attend AdHoc Report training<br>• Write or amend reports as the Agency requirements determine<br>• Participate in unit and system testing |
| **Data Conversion Leads** | 1.0 | Responsibilities include:<br>• Lead efforts to cleanse the legacy data to be migrated<br>• Attend Accela Data Conversion and Database Schema Training<br>• Create data mappings<br>• Write extraction scripts, transformation, business rule routines to move data from legacy data source to Accela staging area<br>• Review and validation of the converted data<br>• Participate in mock data runs during the implementation and final production conversion |
| **Organization Change Management Agent** | .50 | Accela does not provide Change Management services as it relates to Organizational Change Management (OCM). Accela supports the OCM objectives by supplying technical training, content for awareness meetings, demonstrations to user groups during the project, but we find the most success for the Agency to own the OCM objectives and have a dedicated change agent with the organization.<br><br>Responsibilities related to the Accela workstream:<br>• Have a designated OCM representative attend the Accela analysis sessions and determine how best to align Agency operational process with technical solution workflow.<br>• Access the Accela test environment to become more familiar with the solution.<br>• Participate in verification of the solution and attend Conference Room Checkpoints.<br>• An Accela trainer can work with the OCM representative on a plan on how the Accela end user training will be integrated with the OCM campaign. |
| **Trainer** | 1.0 per Dept. | • Primary responsibility for understanding the solution through attending the Train-The-Trainer sessions<br>• Build the training materials for end users from the materials provided from Accela<br>• Conduct End User Training |

Staffing recommendations for on-going maintenance:

| Agency Project Team Role | FTE Quantity | Tasks |
|---|---|---|
| **Business Analyst / Superuser** | .50 | ▪ Report and business rule specification development<br>▪ Simple adjustment of workflow<br>▪ General support for Agency staff using Accela's Mobile, Citizen Access, GIS service, etc. |
| **Infrastructure Support** | 0.10 | Network maintenance |
| **System Administrator** | 0.25 | ▪ General maintenance of the system and user ID maintenance (training a primary and a backup is the best practice).<br>▪ Lead the application of software patches and upgrade releases (2 to 4 days typically) to prepare, test, etc. |
| **GIS Administrator** | 0.25 | Ongoing maintenance usually related to layer updates, new dynamic themes, etc. |
| **Report Developers** | 0.25 | Changes/development of reports |
| **Integration Leads** | .25 | ▪ Primary responsibility for building the integrations from 3$^{rd}$ party systems to the Accela Solution during the software implementation<br>▪ Work with Accela technical personnel during implementation |
| **Trainer** | .25 | ▪ Primary responsibility for understanding the solution through attending the Train-The-Trainer sessions<br>▪ Build the training materials for end users from the materials provided from Accela |

## ACCELA RESOURCES

Accela will assign key resources for the onboarding project. Accela's Project Manager is responsible for coordinating the Accela team and its interaction with key Agency Resources assigned to the Project. The main roles are as follows:

| Accela Resources | Description |
|---|---|
| **Regional Director** | The Regional Director provides executive oversight, oversees the project's progress and direction by working with the Project Manager. Primary goals are to ensure efficiency, consistency, and quality in delivery of Accela implementations. The Regional Director will be part of the project Steering Committee and have a role in escalation of risks and issues to drive the project forward. |
| **Project Manager** | The Accela Project Manager works directly with the Agency Project Manager to manage, track, facilitate and plan all project activities. The Project Manager works with the Project Sponsors, Subject Matter Experts and other stakeholders to ensure the timely delivery of a quality product. |

| | The Project Manager undertakes the project administration tasks including: |
|---|---|
| | • Develop and maintain project plan |
| | • Resource management and tracking |
| | • Risk identification and mitigation |
| | • Issue management and escalation |
| | • Status reporting |
| | • Provide direction and facilitate team meetings |
| **Solution Architect** | Accela's Solution Architect is responsible for the overall solution architecture and will: |
| | • Recommend standard and custom solutions for business requirements |
| | • Architect new custom solutions for Agency-specific scope |
| | • Provide Solution Architect oversight throughout the implementation |
| | • Guide the customer and project team with best practices and standards |
| | • Confirm delivered solutions follow best practices and standards |
| **Implementation Lead** | The Implementation Lead assigned to the project will have significant experience in the business functions as well as the product functionality and is responsible for: |
| | • Lead tailoring sessions |
| | • Lead the tailoring/system configuration |
| | • Providing training/mentoring to Agency staff |
| | • Coordinate with technical team members through analysis and testing as it relates to Agency processes |
| **Implementation Consultant** | Implementation Consultant resources support the project as-needed and typically focus on the following tasks: |
| | • Provide support during tailoring sessions |
| | • Perform tailoring/system configuration |
| | • Unit and functional testing |
| **Technical Consultant(s)** | Accela Technical Consultants are involved in the project to perform the following responsibilities: |
| | • Lead integration analysis, specifications and development |
| | • Lead report analysis, specifications and development |
| | • Provide data conversion expertise, training, mapping assistance, and execute data conversion runs |
| **Training Consultant** | Training Consultants are responsible for Accela Training classes with assistance from Implementation consultants, depending on the nature of the specific project. |

# APPENDIX F: DEFECT DEFINITIONS

## ISSUE TYPES

1.  **Implementation Defect** – Implementation Defects relate to elements configured or built as part of the project such as record configuration, workflow configuration, business rules/automations, custom integrations, and reports. An issue is considered an Implementation Defect when the software is not behaving as per the approved software version (e.g., development stage complete). Data Conversion issues are considered Implementation Defects if the data was available in the proper format via the source data file but is not converted as defined in the approved Data Mapping document and as executed in the previously approved final mock run. For definitions of defect severities, refer to table in next section.

2.  **Product Defect** – Product Defects are errors due to unexpected behavior within the Accela Platform source code. A Product Defect cannot be resolved through configuration changes and requires a new product release or hotfix/patch.

3.  **Non-Defect Issue Examples**
    a.  **Change** – Modifications or additions to the approved specification are considered changes. Examples include:
        i.  Changes to record configuration, new or changes to custom fields, changes to workflow configuration, new or changed expressions, new automation scripts, addition of business rules to existing automation script to account for previously un-documented exception cases or new requirements
        ii.  Addressing a Product Defect or product limitation via configuration changes (implementing a work around)
        iii.  New report or change to existing report format, queries, or business logic
        iv.  New integration or new transaction for existing integration or change to existing integration business logic
    b.  **New Requirement** – Previously undocumented business need driving additions or changes to the configuration is considered a new requirement
    c.  **Conversion Source Data Issue** – Data cleansing issues such as data that is incomplete, erroneously formatted, or misplaced due to data errors found in the source data set often lead to undesirable or unexpected product behavior or system errors
    d.  **3rd Party Product Issue** – Issues related to 3rd party system errors or results returned from a 3rd party system back to Accela through an integration. E.g., data in APO dataset is not up to date and causing errors in Accela or an error in the Financial system is leading to Accela transaction reconciliation problems
    e.  **Product Enhancement** – The Accela product does not currently include or support the desired feature
    f.  **Training Issue** – The end user reported a problem that is attributed to user error
    g.  **Infrastructure Issue** – The issue is rooted in Agency infrastructure or environment settings (such as server hardware/software, network infrastructure, security software/settings, end user hardware/software)

# DEFINITION OF DEFECT SEVERITIES

Please refer to the below table for definition of Implementation Defect severities.

| Severity Level | Description |
|---|---|
| Critical | This is a "must fix" problem, a "showstopper." The problem is causing a major system error, fatal error, serious database corruption, serious degradation in performance, major feature malfunction, or is preventing a major business goal from being realized. The problem does not have a workaround that is reasonably acceptable to the corresponding end-users.<br><br>Examples:<br>1. The Address, Parcel, Owner search is not returning any results which means an Applicant or Staff cannot submit a record because the Parcel is required and requires validation with the Agency's GIS system<br>2. An error is displaying when trying to select the submit button during Intake which is preventing the Record from being created. The error message is not providing any direction to the user other than contact your system administrator.<br>3. The Payment Integration is down which would not allow the online records from being created and the back-office staff would not be able to proceed with workflow due to business rules preventing the advance of workflow if there are outstanding fee due. |
| High | This is a problem that is causing significant loss of feature functionality, but the system can recover from the problem, and it does not cause total collapse of the system. The system does not meet a business goal or a portion of a business goal; performance degradation is minor, but not within established exit criteria; or minor database issues may exist (e.g., single rows or fields may be locked). The problem does have a workaround that is reasonably acceptable to the corresponding end-users.<br>Examples:<br>1. Fees are wrongly being applied to records based on business rules or configuration. The workaround would require business rules (scripts) to be disabled and staff would manually apply fees or staff would void or refund fees if duplication is occurring.<br>2. Notification going to citizens where the URL for the online portal, the Record ID, Decision, or attachments are missing. The workaround, Staff would take more calls around the notification received by the citizen.<br>3. Notification being sent to an incorrect contact on the record. The workaround, Staff would take more calls around the notification received by the citizen.<br>4. Incorrectly activating a workflow task status, for example where the task was not activated or based on business rules closing the workflow task. The workaround, Supervisor would need to override the workflow task status to activate the correct workflow task to proceed with the application life cycle.<br>5. Workflow assignment is either not assigning to the correct department or is not assigning to a department (i.e. department would be blank). The workaround, Supervisors or Managers would need to use the Unassigned Reviews report for workflow assignment. |

| | |
|---|---|
| | 6. A Notification going to one of the contacts identified as recipient, but not all (for example going to the Applicant, but not the Owner). The workaround, Staff would take more calls around the notification not received by the citizen |
| Medium | This is a problem that is causing minor loss of feature functionality. Optional workarounds are acceptable but causing significant efficiency loss. Problem is cosmetic, but public facing and deemed not go-live critical. Examples: 1. Notification going to citizens where Assigned Reviewer, Address, or Contact Types is missing. The workaround, Staff would take more calls around the notification received by the citizen. 2. Notification going to one of the contacts identified as recipient, but not all (for example going to the Applicant, but not the Owner).  MUST be going to Applicant to be considered medium. The workaround, Staff would take more calls around the notification not received by the citizen. 3. Workflow assignment for the round-robin is incorrectly assigning staff users. The workaround, Staff assigned to the record would need to re-assign the workflow to the appropriate Staff 4. Incorrectly setting due dates in the workflow based on defined business rules. The workaround, Staff would need to manually set the due date. 5. Required elements such as document types, contacts, or custom fields are allowing the user to proceed w/out having met the requirement. The workaround, Staff would need to validate all required elements and if one was missing use the workflow task status of "Additional Information Required" to have the user provide the required information to proceed with the application process. |
| Low | This is a problem that is causing minor loss of feature functionality. Optional workarounds reasonably acceptable to the corresponding end-users are available with minor efficiency loss. Minor issues, misspellings, cosmetic changes, etc. Examples: 1. Misspellings on instructions, data elements, report content, or notifications content. 2. Font inconsistencies, if data elements or online portal language is written in different fonts in different sections. 3. Inconsistency with Console configuration between departments, for example the record selection where there is the drop down rather than the decision tree or constraint within the defined filter is not displaying the entire defined criteria. |

# APPENDIX G: PERMIT TYPE MAPPING

Below is the master spreadsheet that captures the mapping fork that the City and Accela has collaborated on as our analysis of mapping the City's different Permit and License Types.

| # | Structural - Commercial | Civic Application | Notes |
|---|---|---|---|
| 1 | *Commercial Addition Permit* | Comm Addition | |
| 2 | *Commercial Alteration Permit* | Comm Alteration | |
| 3 | Commercial Demolition Permit | Comm Demo | Historic goes to Preservation Board first for review |
| 4 | Commercial New Construction Permit | Comm New | |
| 5 | Pool | Comm Pool | |
| | **Structural - Residential** | | |
| 6 | *Residential Addition Permit* | Res Addition | |
| 7 | *Residential Alteration Permit* | Res Alteration | |
| 8 | Residential Demolition Permit | Res Demo | Historic goes to Preservation Board first for review |
| 9 | Residential New Construction Permit | Res New Construction | |
| 10 | Pool | Res Pool | |
| | **Structural - General** | | |
| 11 | Amusement / Events Permit | Special Events | |
| 12 | Antenna Permit (Structural) | Cell Tower | |
| 13 | Bulkhead/ Davit / Dock / Seawall Permit | Custom | |
| 14 | Change of Use | *Change of Use* | |
| 15 | Deck / Gazebo / Patio / Trellis Permit | Custom | |
| 16 | Elevator Permit | Elevator | |
| 17 | Fence Permit | Fence | |
| 18 | Modular / Mobile Home Permit | Mobile | |
| 19 | Reroof Permit | | Combine with 20 |
| 20 | New Roof | Roof | |
| 21 | Misc. Structure Permit | Accessory Structure | |
| 22 | Temporary Structure Permit | Temp Structure | |
| 23 | Window and Door Permit | Custom | |
| 24 | Shutters | | Combine with window and door |
| 25 | Screen Enclosure | | Combine with Accessory structure |
| 26 | Dumpster Enclosure | | Combine with Accessory structure |
| 27 | Concrete Restoration | Foundation | |

| 28 | Awning/Canopy | Custom | |
|----|---------------|--------|--|
| | **Electrical** | | |
| 29 | Amusement / Events / Film Permit | Residential Electrical | |
| 30 | Antenna Permit | Commercial Electrical | |
| 31 | Residential Electrical Work | | |
| 32 | Commercial Electrical Work | | |
| 33 | Generator Permit | | |
| 34 | Low Voltage Permit | | |
| 35 | Photovoltaic / Solar Permit | | |
| 36 | Premise Permit | | |
| 37 | Service Change / Service Repair Permit | | |
| 38 | Service Reconnect / Safety Inspection Permit | | |
| 39 | Temporary Power/30 Day Temp Permit | | |
| | **Mechanical** | | |
| 40 | Cooling Tower / Boiler / Chiller / Pump System Permit | Commercial Mech | |
| 41 | Fuel Tank / Fuel Piping Permit | Residential Mech | |
| 42 | Heating / Ventilation / AC Permit | | |
| 43 | HVAC Changeout Permit | | |
| 44 | Commercial Mechanical Work | | |
| 45 | Residential Mechanical Work | | |
| 46 | Spray Booth Permit | | |
| 47 | Chemical Fire Suppression Permit | | |
| 48 | Hood | | |
| | **Plumbing** | | |
| 49 | Gas Permit | Residential Plumbing | |
| 50 | Irrigation Permit | Commercial Plumbing | |
| 51 | Piping Repair Permit | | |
| 52 | Residential Plumbing Work | | |
| 53 | Commercial Plumbing Work | | |
| 54 | Sewer Cap - Punch and Fill Permit | | |
| 55 | Water Heater Permit | | |
| 56 | Water and Sewer Connection Permit | | |
| 57 | Water Meter | | |
| 58 | Backflow Preventer | | |
| | **Engineering** | | |
| 59 | Right of Way Permit | ROW | If selected, the ROW permit types then show |

| 60 | Landscape Permit | Grading | Must include tree removal and or green space replacement |
|---|---|---|---|
| 61 | Onsite Portable Storage Permit | Temp Structure | |
| 62 | Tree Removal Permit | Tree Removal | |
| 63 | Site Improvement Permit | Custom | |
| 64 | Sealcoat and pavement Marking & Signage | Custom | |
| 65 | Earthwork, Clearing and Grubbing | | Combine with excavation |
| 66 | Excavation | Excavation | |
| 67 | Driveway Permit | Driveway Permit | |
| 68 | Requests | | Tied to GIS, from RockSolid and phone calls, email, may be available on Public Portal |
| 69 | Sidewalk Café | Sidewalk Use | |
| | **Fire** | | |
| 70 | Engineered Life Safety System Permit | Custom | |
| 71 | BDA Signal Strength Survey Permit | Custom | |
| 72 | Fire Main Underground Permit | Fire Prevention | |
| 73 | Fire Pump Permit | Custom | |
| 74 | Commercial Fire Sprinkler | Fire Suppression Permit | |
| 75 | Commercial Flow Test | Custom | |
| 76 | Commercial Fire Alarm | Fire Suppression Permit | |
| | **Building Safety Inspection Program** | | |
| 77 | Structural Concrete Restoration BSIP | Custom | Inspection checklist - 40 hours combined |
| 78 | Electrical Repairs BSIP | Custom | Inspection checklist |
| | **Right of Way** | | |
| 79 | Milling & Resurfacing of Right of Way | Paving | |
| 80 | Maintenance of Traffic | Traffic Control | |
| 81 | Sidewalk Construction | Sidewalk Permit | |
| 82 | Water Sewer and Drainage | Sewer Connection | Grading |
| 83 | Landscape | Landscape | Must include tree removal and or green space replacement |
| 84 | Private/ Franchise Utility Work | Custom | |
| | **Code** | | |
| 85 | Residential | Code/violation | Custom report for code violation letter |
| 86 | Non-Residential | Inspection | |
| 87 | Vacation Rental Inspection | Case | |
| 88 | Special Magistrate | | |
| 89 | Marine | | |

| | Planning | | |
|---|---|---|---|
| 90 | Historic Preservation Site Plan/ Design | | Public Hearing - Joint meeting between planning and historic board. |
| 91 | Site Plan/ Design | Site Plan | Traffic study - track as checklist item and key meta data of the study |
| 92 | Certificate of Appropriateness for Design/ Demolitions | COA | |
| 93 | Variances | Variance | |
| 94 | Re-Zoning | Re-zone | |
| 95 | Land Use Changes | Change in non-conforming use | |
| 96 | Planned Developments | Planned Unit Development | |
| 97 | Special Exceptions | Special Use | |
| 98 | Appeals | Appeals | |
| 99 | Flex Units | Custom | |
| 100 | Historic Designations | Historic Site Request | |
| 101 | General Amendment | | |
| 102 | Amendment To approved plans | | |
| 103 | Public Art Permit | Custom | |
| | Zoning | | |
| 104 | Certificate of Use | Conditional Use Authorization | |
| 105 | Extended Hour License | Custom | |
| 106 | Liquor License | Custom | Sign-off on the state license as it relates to the property |
| 107 | Paint Permit | Custom | Used for CRAs and Historic |
| 108 | Address Designations | Custom | |
| 109 | Zoning Letters | Zone Verification | Report: Fees simple - 200; Detailed - $1,000 |
| 110 | Front Determination Letter | Custom | Letter to declare what street your front yard is on |
| 111 | Platting | Plat | Vacations ROW, abandonment, appeasement agreement (diffierent workflow) |
| 112 | Waivers | | Like variance but only associated with PD rezonnings |
| 113 | Revocations | Amendment | |
| 114 | Appeals | Appeals | |
| 115 | Special Magistrate | | Use code record types |
| 116 | Sign Permit | Sign | |
| 117 | Temporary Sign | Temporary Sign | |

| 118 | Lot Line/Subdivision | | |
|---|---|---|---|
| 119 | Easement agreements | Custom | |
| 120 | Project | | |
| 121 | Pre-Application | | |
| | **Floodplain** | | |
| 122 | Flood Zone Determination Letters | Zoning Verification | |
| 123 | Substantial Improvement Determination | Floodplain | |
| 124 | Elevation Certificates Requests | Custom | |
| 125 | Finished Floor Elevations Determination | | Combine above |
| 126 | SFHA Development Application | | Combine with above |
| 127 | Mechanical and Electric Systems in SFHA Notification | | Combine with above |
| 128 | Gas or Liquid Storage Tanks in SFHA Notification | | Combine with above |
| 129 | SI/SD or Repair Owner's Affidavit | | Combine with above |
| 130 | SI/SD or Repair Contractor Affidavit | | Combine with above |
| 131 | Enclosure Non-conversion Agreement | | Combine with above |
| 132 | V-Zone Certificates | | Combine with above |
| 133 | Floodproofing Certificates | | Combine with above |
| 134 | CCCL Certificates | | Combine with above |
| | **Utilities** | | |
| 135 | Sewer & Water Availability Letters | | Report |
| 136 | Water and Sewer RCC Determination | | Fee Schedule? |
| 137 | FDEP Water & Sewer Extension applications | Extension | |
| 138 | Onsite Drainage | Custom | |
| 139 | Utility Atlas Requests | Custom | |
| 140 | Water Meter Requests | | Combine with Utility Atlas |
| 141 | Water Meter Removal Requests | | Combine with Utility Atlas |
| 142 | Sewer Connection Requests | | Combine with Utility Atlas |
| 143 | Water Tap Requests | | Combine with Utility Atlas |
| 144 | Temporary Hydrant Meter Requests | | Combine with Utility Atlas |
| | **Code Enforcement** | | |
| 145 | Stipulated Agreements | Custom | |
| 146 | Compliance Extensions | Extension | |
| 147 | VRL Check List | | Checklist in the inspection config |
| 148 | VRL Inspection Form | | Report |
| 149 | Administrative Citation | | Task in workflow |
| 150 | Appeal an Administrative Citation | Appeal | |
| 151 | Request a call back from your Code Officer (create) | Custom | |

| 152 | Dangerous Dog Permit | Custom | |
|-----|---------------------|--------|--|
| 153 | Bill Dispute | Appeal | |
| 154 | Lien | Custom | |
| 155 | State Licensed Contractor | Custom | See list in Appendix H for the list of contractor types to choose from |
| 156 | County Registered Contractor | Custom | See list in Appendix H for the list of contractor types to choose from |

## APPENDIX H: CONTRACTOR TYPES

Below are two lists of contractor types.  The first column represents the list of State Licensed contractors that will appear in a drop down list of titles in the record type.  The second column is the list of County registered contractors that will appear in a drop-down list of titles in the record type.

| State (State Record type, docs and verify through DBPR) | County (County Record Type) |
|---------------------------------------------------------|------------------------------|
| Certified Air Conditioning Contractor | BORA - Acoustic Ceiling |
| Certified Air Conditioning Contractor - Class A | BORA - Alarm System Contractor I |
| Certified Air Conditioning Contractor - Class B | BORA - Alarm System Contractor II |
| Certified Alarm System Contractor I (EF) | BORA - Aluminum Specialty Structure |
| Certified Alarm System Contractor II (EG) | BORA - Awning Erection |
| Certified Building Contractor | BORA - Bridges, Overpasses, Underpasses |
| Certified Demolition Specialty Contractor | BORA - Business Financial Management |
| Certified Electrical Contractor (EC) | BORA - Cabinetry |
| Certified Gas Line Specialty Contractor | BORA - Cable Television (for pre-wiring buildings apply with Electrical Board) |
| Certified General Contractor | BORA - Carpentry |
| Certified Glass & Glazing Specialty Contractor | BORA - Central Vac System |
| Certified Gypsum Drywall Specialty Contractor | BORA - Class A Air Conditioning |
| Certified Industrial Facilities Specialty Contractor | BORA - Class A General Building Contractor |
| Certified Irrigation Specialty Contractor | BORA - Class B Air Conditioning Limited to 25 Tons |
| Certified Marine Specialty Contractor | BORA - Class B General Building Contractor |
| Certified Mechanical Contractor | BORA - Class C Residential Building Contractor |
| Certified Plumbing Contractor | BORA - Clearing and Grading |
| Certified Pollutant Storage Contractor | BORA - Concrete Driveways, Curbs, Gutters, Driveway Entrances and Sidewalks |

| | |
|---|---|
| Certified Pool/Spa Contractor | BORA - Concrete Placing & Finishing |
| Certified Residential Contractor | BORA - Demolition (Non-Explosive) |
| Certified Residential Pool/Spa Servicing Contractor | BORA - Directional Drilling |
| Certified Residential Solar Water Heater Contractor | BORA - Dredging |
| Certified Roofing Contractor | BORA - Drywall/Lathing |
| Certified Sheet Metal Contractor | BORA - Electrical Journeyman |
| Certified Solar Contractor | BORA - Electrical Journeyman: Fire Alarm Systems |
| Certified Specialty Contractor | BORA - Electrical Journeyman: Limited Energy Systems |
| Certified Specialty Contractor (ES) | BORA - Elevator Installation & Maintenance |
| Certified Specialty Structure Contractor | BORA - Excavating |
| Certified Swimming Pool Decking Specialty Contractor | BORA - Fabric Awning |
| Certified Swimming Pool Excavation Specialty Contractor | BORA - Feeder Distribution Interface (FDI Telephone Boxes) Installer |
| Certified Swimming Pool Finishes Specialty Contractor | BORA - Fence Erection |
| Certified Swimming Pool Layout Specialty Contractor | BORA - Finished Carpentry |
| Certified Swimming Pool Piping Specialty Contractor | BORA - Flatwork Concrete |
| Certified Swimming Pool Structural Specialty Contractor | BORA - Flooring |
| Certified Swimming Pool Trim Specialty Contractor | BORA - Fuel Transmission and Distribution Lines |
| Certified Tower Specialty Contractor | BORA - Garage Door |
| Certified Traditional Thatched Structure Specialty Contractor | BORA - General Engineered Construction Builder |
| Certified Utility and Excavation | BORA - Glazing |
| Fire Protection System Contractor I | BORA - Gunite |
| Fire Protection System Contractor II | BORA - Heavy Marine |
| Fire Protection System Contractor III | BORA - Insulation |
| Fire Protection System Contractor IV | BORA - Insulation |
| Fire Protection System Contractor V | BORA - Insulation Journeyman |
| Professional Engineer | BORA - Irrigation Specialty Contractor |
| Private Provider - Professional Engineer | BORA - Jack and Bore Installer |
| Registered Air Conditioning Contractor | BORA - Landscape |
| Registered Air Conditioning Contractor - Class A | BORA - Light Marine |
| Registered Air Conditioning Contractor - Class B | BORA - Limited Energy Systems Contractor |
| Registered Alarm System Contractor I (EH) | BORA - LPG Contractor – State License I |
| Registered Alarm System Contractor I (EY) | BORA - LPG Service & Installation –State C |
| Registered Alarm System Contractor II (EI) | BORA - Maintenance Electrician |
| Registered Alarm System Contractor II (EZ) | BORA - Major Roads |
| Registered Building Contractor | BORA - Masonry |
| Registered Dry Wall Specialty Contractor | BORA - Master Electrician |
| Registered Electrical Contractor (ER) | BORA - Master Plumber |

| | |
|---|---|
| Registered Gas Line Specialty Contractor | BORA - Mechanical Contractor |
| Registered General Contractor | BORA - Mechanical Journeyman |
| Registered Mechanical Contractor | BORA - Minor Roads |
| Registered Plumbing Contractor | BORA - Miscellaneous Metals Erection |
| Registered Pool/Spa Commercial Contractor | BORA - Painting |
| Registered Pool/Spa Contractor | BORA - Painting – Unlimited |
| Registered Pool/Spa Residential Contractor | BORA - Pavers |
| Registered Precision Tank Tester | BORA - Pile Driving |
| Registered Residential Alarm Contractor (EJ) | BORA - Pipe Bursting |
| Registered Residential Contractor | BORA - Pipeline Rehabilitation |
| Registered Roofing Contractor | BORA - Plant Construction |
| Registered Sheet Metal Contractor | BORA - Plastering/Stucco |
| Registered Solar Energy Specialty Contractor | BORA - Plumbing Journeyman |
| Registered Specialty Contractor | BORA - Pneumatic Control |
| Registered Specialty Contractor (ET) | BORA - Pool/Spa Contractor – Commercial |
| Registered Structure Specialty Contractor | BORA - Pool/Spa Contractor – Residential |
| Registered Tank Lining Applicator | BORA - Pool/Spa Servicing |
| Registered Utility and Excavation | BORA - Registered Tradesperson |
| | BORA - Residential Interior Remodeling |
| | BORA - Roof Decks |
| | BORA - Roof Painting & Cleaning |
| | BORA - Roofing |
| | BORA - Rough Carpentry |
| | BORA - Sandblasting |
| | BORA - Screen Enclosures |
| | BORA - Sealcoating |
| | BORA - Secondary Utility and Excavation |
| | BORA - Sheet Metal |
| | BORA - Sheet Metal Journeyman |
| | BORA - Shutter/Opening Protective |
| | BORA - Sign Erection (Non-Electric) |
| | BORA - Solar |
| | BORA - Solar Photovoltaic Systems Specialty Journeyman |
| | BORA - Steel Reinforcing & Iron |
| | BORA - Striping, Marking and Signage of Roadways, including pavements |
| | BORA - Structural Steel |
| | BORA - Terrazzo |

| | BORA - Test & Balance – Class A Unlimited |
|---|---|
| | BORA - Test & Balance – Class B Limited |
| | BORA - Tile, Marble & Granite |
| | BORA - Transport Assembly |
| | BORA - Underground and Aerial Utility Transmission and Distribution Lines |
| | BORA - Underground Utility and Excavation |
| | BORA - Waterproofing |
| | BORA - Window & Door |

## APPENDIX I: PROJECT TIMELINE

Below is the project timeline as discussed. This timeline will be baselined as part of the Define stage of the project. This graphic is also available in Excel format.
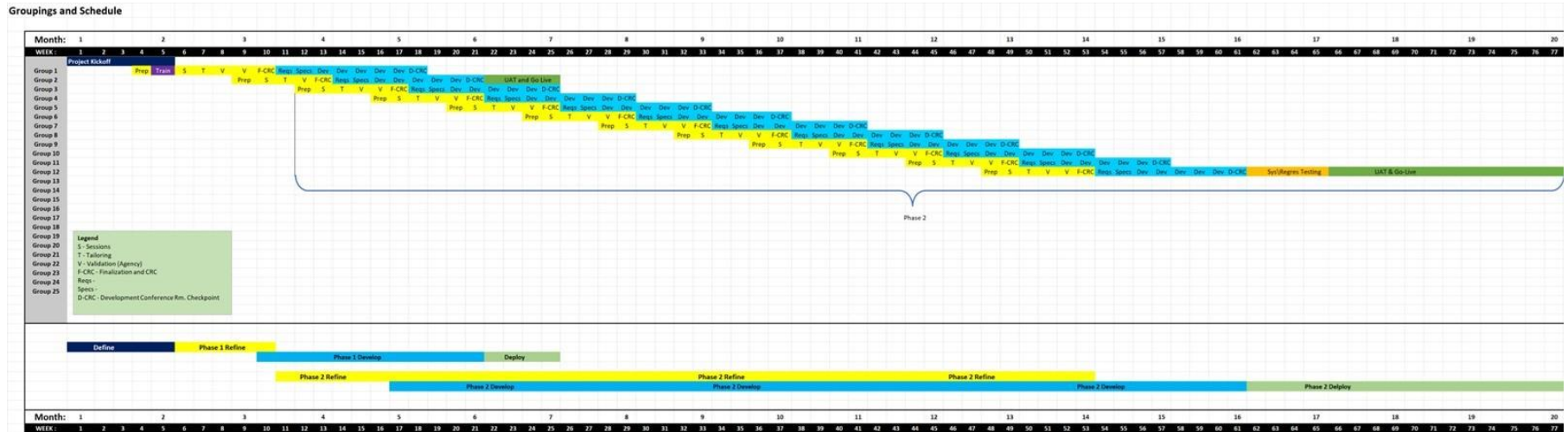
# Statement of Work

Prepared For: City of Hollywood, FL

Statement of Work Regarding the ePermitHub Digital Plan Room Project for Accela Cloud Customers

**11/21/2023**

Carahsoft Technology Corp.
11493 Sunset Hills Road
Suite 100
Reston, VA  20190
Tel: 703-871-8500

# Table of Contents

# Statement of Work

Carahsoft Technology Corp. ("Carahsoft") and PermitRocket Software LLC ("Company" - dba "ePermitHub") shall perform the Services described below for the City of Hollywood, FL ("the Customer") to implement the ePermitHub Digital Plan Room components into the Accela Civic Platform. This Statement of Work ("SOW") defines the Services to be provided by the Company.

ePermitHub provides a cutting-edge web-based electronic plan review solution in partnership with Accela, the largest permitting software vendor. This solution, the ePermitHub Digital Plan Room, is designed to meet the requirements of government permitting agencies around the United States and specifically meet the requirements of agencies using the Accela permitting software.

## *Project Objective*

To complete the ePermitHub Digital Plan Room components implementation into the Accela Civic Platform, including the Accela Citizen Access public portal. Upon completion, Customer staff will access integrated digital review capabilities, including automated digital signature validation, automated document and sheet versioning, collaborative issue management, and 2D electronic markups completely from within the Accela Civic Platform User Interface. In addition, the Customer's customers can easily submit plans and manage the corrections process, including adding resolution comments and uploading subsequent resubmittals, from within the ePermitHub public portal seamlessly embedded within the Customer's Accela Citizen Access portal.

## *Implementation Services Overview*
## Phase 1A and 2A - Implementation Phase

**Phase 1A and 2A Deliverables:**

1. Project kick-off and initiation
    - Project kick-off presentation
    - Establish a communication and project tracking plan.
    - Receive access to the customer's Accela Civic Platform environments
2. Digital Plan Room Cloud Provisioning
    - Verify that all Accela Civic Platform prerequisites are in place
    - Cloud Provisioning of the Digital Plan Room components into Customer's SUPP environment

- Cloud Provisioning of the Digital Plan Room database

3. Digital Plan Room Configuration Analysis
    - Define configuration for each Plan Review record type
    - Determine all needed document types
    - Plan document upload configuration
    - Plan Digital Signatures validation configuration
    - Plan Accela workflow integration configuration points
    - Design final approved set cloning business logic
    - Determine Accela to Digital Plan Room role mappings
    - Determine Digital Plan Room disciplines configuration
    - Determine required Approval Stamps

4. Digital Plan Room Configuration
    - Configure Accela Civic Platform standard choices as defined in the previous Deliverable
    - Configure new Accela document types and associated business rules
    - Configure Digital Signature validation
    - Configure Digital Plan Room EMSE library and required scripts
    - Implement custom EMSE scripting as determined during Configuration Analysis
    - Design, create and configure Approval Stamps as determined during Configuration Analysis

# Phase 1B and 2B - Training, User Acceptance & Go-Live Phase

**Phase 1B and 2B Deliverables:**

1. User Acceptance Testing (UAT)
    - Assist Customer in the UAT effort and validation of system configuration
    - Resolve issues resulting from Customer User Testing
    - Provide recommendation on testing strategy and best practices
    - Agree on UAT completion date and Go-Live date

2. Administrative and technical training
    - Digital Plan Room Administration training
    - Provide Administration Training Documentation

3. End-User Training
    - Digital Plan Room End User training
    - Provide End User training documentation

4. Agency Customer Enablement
    - Produce contextually relevant public-facing training and help web-based videos for licensed professionals, contractors, owners and the general public submitting plans
    - Produce public-facing User Guide for licensed professionals, contractors, owners, and

the general public submitting plans
5. Go-Live Migration & Production Planning
    ● Produce Go-Live Project Migration Plan
    ● Produce Production Deployment Plan
    ● Conduct web-based Agency customer training sessions
6. Post-Go-Live Support
    ● Post-Go-Live support provided
    ● Resolution of all Critical and High defects as defined above in "Phase 2 - Deliverable 1: UAT" discovered during Post Go-Live support period
    ● Transfer meeting regarding ongoing support of the Customer to the Company Support program conducted

## Project Assumptions

1. Company assumes the Customer will have the proper resources to implement the Digital Plan Room software.

2. Company assumes all Professional Services costs and work have been identified in the SOW. Any additional cost or work required for this project will be identified and requested through a Change Request process.

3. Company assumes the Customer has identified a dedicated Accela user-account to be used for communication between the ePermitHub and Accela software.

4. Company assumes the Customer will provide the appropriate staff to be trained on the software during the training periods outlined in the Project timeline.

5. Company assumes all the Customer's relevant Accela record types and workflows requiring plan review in scope for this project are already configured by Accela staff and then company will add plan review configuration.

6. Company assumes it will provide recommendations to the Customer for plan review related record types regarding record and workflow statuses most appropriate for the Digital Plan Room software.

7. Company assumes all standard choices required to integrate the software into the Customer's Accela configuration and software will be configured by the Company.

8. Company assumes the Customer will collaborate with Company on delivery of scripts required for the Digital Plan Room.

9. Company assumes Customer will verify that all Accela Civic Platform prerequisites are in place.

10. Company assumes that a historical data conversion into the Digital Plan Room will not be needed, and that manual procedures will be documented to import historical and in-flight records into the Digital Plan Room as necessary.

11. Travel & Expenses:
    a. Actual amounts of any reasonable and customary travel-related expenses incurred during the performance of services under this SOW will be billed to the Customer in line with the Customer's Travel & Expense policy.
    b. The Company 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, toll charges).
    c. The Company will work with the Customer to manage and control its expenses and will not incur expenses in excess of the initial contracted budget below without Customer's prior written consent.
    d. Expense receipts will be made available as requested by the Customer.
    e. Unless otherwise indicated, assumption is all implementation services will be conducted remotely, except UAT and Training.
    f. The Company estimates no more than 2 onsite "Trip Units" required for the project. A Trip Unit is defined as one round trip for a single Company Professional Services resource (i.e., Consulting Engineer, Trainer, Project Manager, etc.) spending 2-3 business days at the Customer's site.
    g. The average cost for a Trip Unit is estimated at $2,500 each unit. A given trip might require more than one Trip Unit.
    h. Should the Customer desire additional onsite trips, a Change Order is required prior to travel commencing to cover the cost of those additional trips. See Payment Terms & Delivery Schedule below for additional detail.

12. Projects Put On Hold: It is understood that sometimes Customer priorities are revised requiring the Customer to place the Company implementation on hold.  The Customer must send a formal written request to the Company to put the project on hold.  Delays of two (2) weeks or more that have a tangible impact on the Company's resource plan are subject to change order.
    If either party puts the project on hold for more than 90 days, the other party reserves the right to terminate the contract or negotiate new terms.

When a Project is put on hold, at minimum, the Company will need to draft a Change Order to keep some of the Company project manager's time engaged in monitoring progress and in resourcing the project once it comes off hold.  Other Change Order items may be needed because of the delay.  When a project goes on hold, project resources will be re-deployed, and the Company will need a forty-five (45) calendar day notice to re-staff the project. The Company cannot guarantee a Project Start Date until the Company resources are confirmed.

Should either party become non-responsive to the other party's communications for a term of 30 calendar days regarding the continuance of the project work, the other party can choose to cancel the remainder of the Statement of Work.  If both parties desire to finish the project, a new Statement of Work may be negotiated at the standard rates.

13. Training Execution parameters are as follows:
    a. At the beginning of the project, the Customer selects and prepares the power-users who will be participating in the training and subsequently training end-users. Any switch in Customer internal resources may require the need for a project change request to account for missing time.
    b. In the event of onsite training, Customer provides suitable onsite facilities and equipment, such as access to network-connected training computers and monitors, to accommodate various training classes.
    c. In the event of onsite Training, classes are capped at fifteen (15) participants.
    d. In the event of offsite training, Customer ensures all remote class attendees have access to suitable equipment, such as access to internet-connected training computers and monitors, to accommodate various training classes.
    e. Company provides printed training resources developed by the Company for Customer staff being trained.
    f. Ensure that users are proficient in using PCs in a Windows environment as a prerequisite for the course.
    g. Ensure that users are familiar with the use of standard Internet browsers as a prerequisite for the course.
    h. Customer is responsible for printing all training materials developed by the Company for End-User Training.

14. Schedule and delivery are contingent on availability and access to Customer staff resources.

15. Any Professional Services associated with Accela, and other third-party products are not included in this Statement of Work and should be contracted directly through those products or their affiliates.  The company will work closely with the Accela Project Manager to align and coordinate on schedule and deliverables per the contract.

# Payment Terms & Delivery Schedule

Total compensation for the above-defined Implementation Services is not expected to exceed the Project Total specified in the Project Total Estimate table below all exclusive, and will be paid quarterly according to a time and materials basis:

| Stage Title | Payment Milestone | Acceptance Criteria (See Appendix A for details) | Milestone Amount (Time & Materials Estimates) | Estimated Month for Delivery |
|---|---|---|---|---|
| Phase 1A | Project Kick-Off & Initiation | • Completion of the Project Kickoff Meeting<br>• The company's access to the Customer's environment is set up | (12 hours) $2,478.24 | Month 1 |
| Phase 1A | Digital Plan Room Installation/Provisioning | ● All relevant components of the Digital Plan Room software provisioned on Customer's cloud infrastructure and deemed to be working properly<br>● Confirmation of ability to log in to Digital Plan Room software<br>● Two [2] sandbox environments created | (20 hours) $4,130.40 | Month 1 |
| Phase 1A | Digital Plan Room Configuration Analysis | ● Completion of To-Be Analysis Sessions | (40 hours) $8,260.80 | Month 2 |
| Phase 1A | Digital Plan Room Configuration | ● Configuration documentation | (40 hours) $8,260.80 | Month 3 |

| | | provided to Customer <br> • The customer has 15 business days to conduct an initial review of the Digital Plan Room configuration.  If no changes or comments are requested within 15 days, the deliverable is considered approved by the Customer. Upon delivery of the Customer's initial feedback from the initial review, Company will complete the necessary changes and updates.  The second and final review will have 7 business days for acceptance. Upon delivery of Customer feedback from the second and final review, Company will complete the necessary changes and updates. | | |
|---|---|---|---|---|
| Phase 1B | User Acceptance Testing (UAT) | • Creation of UAT scripts by Company | (40 hours) $8,260.80 | Month 6 |

| | | | | |
|---|---|---|---|---|
| | | ● Completion of up to two [2] weeks of UAT support by the Company<br>● Completion of up to three [3] weeks UAT by the Customer<br>● Resolution of all Critical and High defects by Company discovered during UAT by Customer | | |
| Phase 1B | Administrative and Technical Training | ● Execution of administrative and technical training courses | (10 hours) $2,065.20 | <mark>Month 5</mark> |
| Phase 1B | End User Training | ● Execution of End User Training course to the Customer as described in Appendix A | (20 hours) $4,130.40 | <mark>Month 5</mark> |
| Phase 1B | Agency Customer Enablement | ● Two [2] web-based Agency Customer training sessions of one [1.5] hour each completed covering the following topics:<br>  ○ Plan Submittal<br>  ○ File Validation Overview<br>  ○ Response to | (20 hours) $4,130.40 | <mark>Month 6</mark> |

| | | | | |
|---|---|---|---|---|
| | | Customer comments <br> ○ Plan Re-submittal <br> ● Following five videos are produced by Company & delivered to Customer: <br> ○ Uploading Plans & Supporting Documents <br> ○ Finalizing & Submitting Review Packages <br> ○ Accessing Review Issues & Conditions <br> ○ Submitting Revised Plans <br> ○ Downloading Approved Plans <br> ● User Guide produced & delivered to Customer in editable format <br> ● Execution of training for Customer's customers as described above | | |

| | | | | |
|---|---|---|---|---|
| Phase 1B | Production Planning & Go-Live Migration | ● Go-Live Migration Plan document finalized<br>● Production Plan document finalized<br>● ePermitHub Digital Plan Room used in the Production environment for daily use | (20 hours) $4,130.40 | <mark>Month</mark> 7 |
| Phase 1B | Post Go-Live Support | ● Six [6] weeks of Post Go-Live support provided<br>● Resolution of all Critical and High defects as defined above in "Phase 2 - Deliverable 3: UAT" discovered during Post Go-Live support period<br>● Transfer meeting regarding ongoing support of the Customer to the Company Support program conducted | (40 hours) $8,260.80 | <mark>Month 7</mark> |
| | | | | |
| Phase 2A | Digital Plan Room Configuration Analysis | ● Completion of To-Be Analysis Sessions | (70 hours) $14,456.40 | Month 8 |
| Phase 2A | Digital Plan Room Configuration | ● Configuration documentation provided to Customer<br>● The customer has 15 business days | (70 hours) $14,456.40 | Month 10 |

| | | | | |
|---|---|---|---|---|
| | | to conduct an initial review of the Digital Plan Room configuration.  If no changes or comments are requested within 15 days, the deliverable is considered approved by the Customer. Upon delivery of the Customer's initial feedback from the initial review, Company will complete the necessary changes and updates.  The second and final review will have 7 business days for acceptance. Upon delivery of Customer feedback from the second and final review, Company will complete the necessary changes and updates. | | |
| Phase 2B | User Acceptance Testing (UAT) | • Creation of UAT scripts by Company<br>• Completion of up to two [2] weeks of UAT support by the Company | (40 hours) $8,260.80 | Month 17 |

| | | | | |
|---|---|---|---|---|
| | | ● Completion of up to three [3] weeks UAT by the Customer<br>● Resolution of all Critical and High defects by Company discovered during UAT by Customer | | |
| Phase 1B | End User Training | ● Execution of End User Training course to the Customer as described in Appendix A | (20 hours) $4,130.40 | Month 18 |
| Phase 1B | Agency Customer Enablement | ● Two [2] web-based Agency Customer training sessions of one [1.5] hour each completed covering the following topics:<br>  ○ Plan Submittal<br>  ○ File Validation Overview<br>  ○ Response to Customer comments<br>  ○ Plan Re-submittal<br>● Execution of training for Customer's customers as described above | (10 hours) $2,065.20 | Month 18 |

| Phase 1B | Production Planning & Go-Live Migration | ● Go-Live Migration Plan document finalized<br>● Production Plan document finalized<br>● ePermitHub Digital Plan Room used in the Production environment for daily use | (20 hours) $4,130.40 | Month 19 |
|---|---|---|---|---|
| Phase 1B | Post Go-Live Support | ● Six [6] weeks of Post Go-Live support provided<br>● Resolution of all Critical and High defects as defined above in "Phase 2 - Deliverable 3: UAT" discovered during Post Go-Live support period<br>● Transfer meeting regarding ongoing support of the Customer to the Company Support program conducted | (60 hours) $12,391.20 | Month 19 |
|  |  |  |  |  |
|  |  | Phase 1 Total | (262 hours) $54,108.24 |  |
|  |  | Phase 2 Total | (290 hours) $59,890.80 |  |
|  |  |  |  |  |
|  |  | Overall Total | **(552) $113,999.04** |  |

Estimated level of effort is based on (i) the nature and scope of the Services and associated tasks and artifacts, (ii) the expected staffing levels required to perform the scope, (iii) the Project Schedule, (iv) the Company and Customer's roles and responsibilities, and (v) the other assumptions as set forth in this SOW.

The Company's total Service hours and provided estimate are exclusive of taxes and expenses. This estimate 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 Company will not (i) exceed the total estimate amount without the prior approval of Customer and/or (ii) continue to provide Services, after the total estimate has been reached, without the prior authorization of Customer. Should there be changes to the scope, timeline, or resources that increase the hours or costs needed to complete the Project, a Change Order may be required prior to project continuation. Please see Change Order details in the Assumptions section. Invoices will be sent for hours worked every quarter and will be paid in accordance with Net 30 payment terms. Deliverable timelines are contingent upon timely compensation.

| ACCEPTED BY: [City of Hollywood, FL] | | ACCEPTED BY: Carahsoft Technology Corp. | |
|---|---|---|---|
| By: | | By: | |
| Name: | | Name: | |
| Title: | | Title: | |
| Date: | | Date: | |

# Appendix A: Detailed ePermitHub Digital Plan Room Project Plan

## *Project Plan Overview*

The following section describes the specific activities and tasks that will be executed to meet the customer's business objectives and requirements.  In support of the implementation effort as described above, the Company will provide the below-detailed implementation services.  For each deliverable, a description and criteria for acceptance are provided.

## Success Criteria

The definition of project success is critical to defining appropriate expectations from the start of a project. Success is defined for each phase of the project so the team can measure it as it iterates toward the final goal as follows:

- Phase 1A and 2A: Analysis and configuration is complete and ready to start acceptance testing
- Phase 1B and 2B: Acceptance testing and user training completed, go-live completed, post-go-live support completed

## *Phase 1A and 2A: Implementation Phase*

This phase aims to create a test Digital Plan Room deployment on the Accela Civic Platform that the Customer staff can use as a testbed for acceptance and feedback. During this phase, the main features of the Digital Plan Room deployment will be implemented into the Customer's Accela test environment. Each Deliverable in this phase defines a set of tasks to complete the implementation.

### Phase 1A - Deliverable 1: Project Kick-Off and Initiation
 Project initiation consists of project planning activities, project management, template creation tracking, establishing project issue tracking and communication methodology, and conducting the kickoff meeting.

As part of the initiation, the following tasks will be conducted:

- Establish a communication plan and create a task management dashboard in an acceptable repository.
- Identify team members who will be responsible for deliverable sign-off and document procedures.

- The customer creates an Accela user for Digital Plan Room Communication with Accela software.
- Review and adjust project scope based on additional findings, if necessary
- Conduct a project kickoff meeting to review project objectives, methodology, timeline, roles, and other key project elements.

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

Company Responsibilities:

- Provide timely and appropriate responses to Customer's reasonable requests for information.
- Coordinate project planning activities.
- Complete Baseline Project Schedule and Project Kickoff Presentation deliverables with input from appropriate Customer Resources

Customer Responsibilities:

- Identifying and setting expectations with key resources and subject matter experts for ongoing participation in the project.
- Providing timely and appropriate responses to the Company's requests for project planning input and meeting logistics requests.
- Including Executive Project Sponsor in the Project Kickoff Meeting.
- Create an Accela user for Digital Plan Room Communication with Accela software.

Acceptance Criteria:

- Completion of the Project Kickoff Meeting
- The company's access to the Customer's environment is set up

Acceptance Review Period:

- Seven (7) business days

## Phase 1A - Deliverable 2: Digital Plan Room Provisioning

During the cloud provisioning step, the Company team will review the Digital Plan Room cloud provisioning requirements with the Customer's technical team, including infrastructure and software prerequisites. Once the prerequisites are confirmed to be in place in the Customer's DEV environment, the Digital Plan Room software components will be provisioned by the Company and verified to work properly. Documentation on the software setup architecture specific to the Customer will be provided to the Customer's technical team for reference.

Company Responsibilities:

- Providing timely and appropriate responses to Customer's requests for information.
- Consulting with Customer resources to provide technical input and answer technical questions related to the requirements for the Digital Plan Room.
- Company will provision up to two [2] sandbox environments

Customer Responsibilities:

- Providing timely and appropriate responses to Company's requests for information
- Providing Company with Admin contact information to setup Customer's Admin account

Acceptance Criteria:

- All relevant components of the Digital Plan Room software provisioned on Customer's cloud infrastructure and deemed to be working properly
- Confirmation of ability to log in to Digital Plan Room software
- Two [2] sandbox environments created

Acceptance Review Period:

- Seven (7) business days

## Phase 1A and 2A - Deliverable 3: Digital Plan Room Configuration Analysis

Configuration Analysis comprises the activities required to define the appropriate configuration of the Digital Plan Room and its integration points with the Accela Civic Platform, specifically to reflect the Customer's plan review business processes. During this task, the Company team, with input from the Customer, will identify any details as it pertains to plan submittal, review, and approval and provide appropriate configuration specifications for the following items:

- Determine configuration for each Plan Review record type
- Determine all needed document types
- Determine document upload configuration
- Determine Digital Signatures validation configuration
- Determine Accela workflow integration configuration points
- Determine final approved set cloning business logic
- Determine Accela to Digital Plan Room user role mappings
- Determine Digital Plan Room discipline configuration
- Determine required Approval Stamps

The project dashboard will document and keep track of all the Configuration Analysis tasks and determinations.

Company Responsibilities:

- Providing timely and appropriate responses to Customer's request for information
- Interviewing staff to understand existing business processes
- Conducting to-be analysis sessions to capture the required business processes to be automated within the system
- Conducting meetings via email, web conference, and phone to gather and validate analysis input

Customer Responsibilities:

- Providing timely and appropriate responses to Company's requests for information.
- Making available the appropriate Customer key users and content experts to provide the required information, participate in the configuration analysis, and verify the accuracy of the documented workflows, input/output formats, and data elements
- Providing any existing business process documentation, including process flows; fee schedules; commonly used applications, reports, and forms; and other relevant information
- Scheduling participants and meeting locations for analysis activities

Acceptance Criteria:

- Completion of To-Be Analysis Sessions

Acceptance Review Period:

- Seven (7) business days

## Phase 1A and 2A - Deliverable 4: Digital Plan Room Configuration

The Company will configure the Digital Plan Room and make any modification to the Accela Civic Platform configuration by the requirements and determinations made and agreed upon in Deliverable 3.

The following high-level tasks will be performed:

- Configure Accela Civic Platform standard choices for the Digital Plan Room as defined in the previous Deliverable
- Configure new Accela document types and associated business rules
- Configure Digital Signature validation
- Configure Digital Plan Room EMSE library and required scripts
- Implement custom EMSE scripting as determined during Configuration Analysis
- Design, create and configure Approval Stamps as determined during Configuration

Documentation on the software configuration specific to the Customer will be provided to the Customer's administrative and technical team for reference.

Company Responsibilities:

● Providing timely and appropriate responses to Customer's request for information
● Configuring the solution components as defined in the To-Be Analysis sessions

Customer Responsibilities

● Providing timely and appropriate responses to Company's requests for information
● Making available the appropriate Customer key users and content experts to participate in creating the system to learn about the system (knowledge transfer)
● Working with Company to verify that the system meets the requirements captured in the To-Be Analysis sessions

Acceptance Criteria:

● Configuration documentation provided to Customer
● The customer has 15 business days to conduct an initial review of the Digital Plan Room configuration.  If no changes or comments are requested within 15 days, the deliverable is considered approved by the Customer. Upon delivery of the Customer's initial feedback from the initial review, Company will complete the necessary changes and updates.  The second and final review will have 7 business days for acceptance. Upon delivery of Customer feedback from the second and final review, Company will complete the necessary changes and updates.

Acceptance Review Period:

● Seven (7) business days

# Phase 1B and 2B: User Acceptance Testing, Training & Go-Live Phase

In this phase, the test deployment will grow into a fully functioning electronic plan review deployment guided by Customer staff feedback and input. The Customer's participants are given full access to the deployment created in the previous phase and will conduct "test" electronic plan review workflows using sample data and plans. In this phase, the team will simulate as many real-life conditions and project types as possible to learn and understand the capabilities of the workflow as designed. Issues are recorded by Customer staff to assess and correct as agreed to by both parties. Additionally, training

sessions are conducted for administrators and end-users, and any additional training documentation is also provided in this phase.

### Phase 1B and 2B - Deliverable 1: User Acceptance Testing (UAT)

During UAT, the Company will assist the Customer in testing and validating the configuration and readiness to be migrated to production. A template test plan that includes generic best practices will be provided to the Customer. In collaboration with the Customer, the test plan will be refined to reflect the Customer's configuration and business use cases.

After completion of the test plan, the testing effort will begin. The testing effort will require a significant time investment by the Customer. The Company will aid the Customer through UAT support and address and rectify issues discovered during the UAT process as the Customer staff executes the test plan.

Once the entire team has reached a consensus and there is enough confidence in the solution, the entire configuration will be ready to start final preparations for migration to production and Go-Live. At this point, a precise Go-live date will be determined.

UAT will take up to eight [8] weeks, with two [2] to three [3] weeks estimated for UAT script development by the Company, two [2] to three [3] weeks of testing by the Customer, and two [2] weeks of Critical and High issue resolution by the Company. A change order is required to add more support if the Company's UAT support exceeds two [2] weeks.

For issues deemed product Critical or High defects a support ticket is opened with the Company engineering team using the Company's Service Desk process for review and resolution. All Critical and High defects shall be resolved before the completion of UAT. The following describes the definition of Critical and High defects:

- **Critical** – Major test case(s) are blocked from successful execution without an available workaround. During dry runs and formal test executions, a test critical defect must have an acceptable workaround or fix as soon as possible.
- **High** – Significant degradation in primary operational functions or performance/stability. No workaround is available. During dry-runs and formal test executions, a defect categorized as High requires a fix or acceptable workaround as soon as possible.
- **Medium –** Workaround available for total or partial loss of major operational functions. It has a marginal impact on major operational functions**.**
- **Low –** A system problem that does not prohibit the successful completion of a test. No significantly noticeable impact on system operations.


Company Responsibilities:

- Developing the User Acceptance test scripts
- Providing recommendations on testing strategy and best practices
- Supporting the Customer in up to two [2] weeks of UAT effort and the validation of the system configuration and its readiness for migration to production for active use
- Resolving all Critical and High defects discovered because of UAT activities

Customer Responsibilities:

- Providing timely and appropriate responses to the Company's request for information
- Making available the appropriate Customer key users and content experts to participate in UAT as defined and managed by Customer
- Utilizing the use cases documented in each Configuration Document Deliverable as the basis for the acceptance of this Deliverable
- Conducting up to three [3] weeks of UAT following the development of test scripts by Company

Acceptance Criteria:

- Creation of UAT scripts by Company
- Completion of up to two [2] weeks of UAT support by the Company
- Completion of up to three [3] weeks UAT by the Customer
- Resolution of all Critical and High defects by Company discovered during UAT by Customer

Acceptance Review Period:

- Seven (7) business days

## Phase 1B - Deliverable 2: Administrative and Technical Training

The Company will provide training to Customer staff focusing on the administrative and technical setup and the Digital Plan Room administration and configuration. The goal is to educate Customer staff in all aspects of the Digital Plan Room solution and ensure the staff is self-sufficient before Go-Live.

The Company will provide remote training sessions that span 4 hours. Customer staff is responsible for selecting qualified users for the training, who are critical to project success.  The following topics will be covered as part of the training session:

- Accela workflow integration
- Plans and Documents upload
- Digital Plan Room roles and mapping to Accela roles
- Digital Plan Room Standard Choices
- Digital Signatures validation
- Approval Stamps creation and deployment

The Company will provide Customer staff with appropriate documentation for the topics covered in the training session.

Company Responsibilities:

- Coordinate with the Customer to define training schedule and logistics

● Deliver training per the specific requirements listed above

Customer Responsibilities:

● Select and prepare the power-users who participate in the training and subsequently training end-users
● Arrange the time and qualified people for the training who are critical to the project success
● Provide suitable Customer facilities to accommodate various training classes
● 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 the use of standard Internet browsers as a prerequisite for the course
● Ensure that the users install prerequisite software prior to training

Acceptance Criteria:

● Execution of administrative and technical training courses

Acceptance Review Period:

● Seven (7) business days

## Phase 1B and 2B  - Deliverable 3: End User Training

The Company will complete all the necessary training to run electronic plan review operations across applicable departments. Training materials and required training sessions will be created and conducted.

The Company will provide the following onsite or remote training sessions to the Customer End Users (Users with non-administrative roles) within the same week:

● One [1] two-hour session for Intake Specialists/Permit Technicians with the same curriculum for each session
● Two [1] four-hour sessions for Plan Reviewers/Managers with the same curriculum for each session

It is recommended that each training session be recorded for reference.

The course curriculum is as follows:

**Intake Specialists/Permit Technician Curriculum**

|  | Description |
|---|---|
| ePermitHub Digital Plan Room | ● Plan submittal from the customer perspective |

| embedded into Accela Citizen Access | ○ Understanding the process, a customer will follow to submit an application and submit plans and supporting documents<br>○ Review the types of file validation & digital signature validation occurring during submittal and how to interpret any errors<br>○ Walkthrough file processing and reviewing the automated sheet numbering. |
|---|---|
|  | ● Resubmittal process from the customer perspective<br>○ Reviewing & answering issues from a rejected plan set<br>○ Completing the resubmittal of plan addressing the answered issues. |
| ePermitHub Digital Plan Room embedded into Accela Civic Platform Back Office | ● Plan submittal from a staff perspective when done in-house<br>● High-level review of Plan Reviewer activities<br>○ Learn at a high-level the steps a plan reviewer will perform and how they affect what the customer will see in Accela Citizen Access |

**Plan Reviewers/Managers Curriculum**

|  | **Description** |
|---|---|
| ePermitHub Digital Plan Room embedded into Accela Civic Platform Back Office | ● Accela workflow and the digital plan room<br>○ Learn how the digital platform interacts with the Accela workflow |
|  | ● Completing a plan review<br>○ Navigating the digital plan room<br>○ Overview of the viewer and available tools<br>○ Creating issues & markup<br>○ Reviewing issues and filtering tools<br>○ Sheet versioning<br>○ Comparison tools<br>○ Stamping<br>● Rejecting plans & requesting revisions<br>● Resubmittals & approving plans<br>● Create print set |

| | |
|---|---|
| | ● Overview of Intake Staff usage of the digital plan room<br>○ Plan submittal from a staff perspective when done in-house |
| ePermitHub Digital Plan Room embedded into Accela Citizen Access | ● Overview of customer usage of digital plan room<br>○ Plan submittals and file validation & processing<br>○ Reviewing and answering issues contextually from the plan markup |

Company Responsibilities:

- Coordinating with the Customer to define training schedule and logistics
- Providing End User Training as described above
- Providing training material in a format easily modifiable by the Customer

Customer Responsibilities:

- Selecting and preparing the power-users who will be participating in the training and subsequently training end-users
- Arranging the time and qualified people for the training who are critical to the project success
- Providing suitable Customer onsite facilities to accommodate various training classes
- Providing printed training resources developed by Company for Customer staff
- Ensuring that users are proficient in using PC's in a Windows environment as a prerequisite for the course
- Ensuring that users are familiar with the use of standard Internet browsers as a prerequisite for the course

Acceptance Criteria:

- Execution of End User Training course to the Customer as described above

Acceptance Review Period:

- Seven (7) business days

## Phase 1B and 2B  - Deliverable 4: Agency Customer Enablement

In this context, the "Agency" (i.e., city, county, state, etc.) is the Company's customer, and the "Agency Customer" is the Agency's customers, such as the licensed professionals, owners and general public leveraging the ePermitHub Digital Plan Room embedded in Accela Citizen Access to:

- Submit their initial electronic plans and supporting documents
- Respond to Issues related to their plans created by Agency Plan Reviewers
- Resubmit corrected plan sheets (aka, digital slip sheets)
- Access and print approved job copies of their plans

During Agency Customer Enablement, Company provides web-based training sessions, produces contextually relevant public-facing web-based training videos, and produces a User Guide for Agency's customers on how to use the ePermitHub Digital Plan Room embedded in Accela Civic Access. Customer publishes videos and User Guide to a dedicated Digital Plan Room information page at Customer's website.

Company Responsibilities:

- Provide three [2] web-based Agency Customer training sessions of one [1.5] hours each covering the following topics:
    - Plan Submittal
    - File Validation Overview
    - Response to Agency Correction comments
    - Plan Re-submittal
- Produce the following five (5) public-facing videos:
    - Uploading Plans & Supporting Documents
    - Finalizing & Submitting Review Packages
    - Accessing Review Issues & Conditions
    - Submitting Revised Plans
    - Downloading Approved Plans
- Produce User Guide in editable format

Customer Responsibilities:

- Creating a dedicated public-facing information web page for related Digital Plan Room videos and User Guide
- Adding Customer branding at the beginning and end of each video
- Adding Customer branding to User Guide
- Adding Digital Plan Room videos and User Guide to Customer's Digital Plan Room information web page
- Coordination of the external customer webinar scheduling, registration and launching of the training

Acceptance Criteria:

- Two [2] web-based Agency Customer training sessions of one [1.5] hour each completed covering the following topics:
    - Plan Submittal

  - ○ File Validation Overview
  - ○ Response to Customer comments
  - ○ Plan Re-submittal
- The following five videos are produced by Company & delivered to Customer:
  - ○ Uploading Plans & Supporting Documents
  - ○ Finalizing & Submitting Review Packages
  - ○ Accessing Review Issues & Conditions
  - ○ Submitting Revised Plans
  - ○ Downloading Approved Plans
- User Guide produced & delivered to Customer in editable format
- Execution of training for Customer's customers as described above

Acceptance Review Period:

- Seven (7) business days

## Phase 1B and 2B  - Deliverable 5: Production Planning & Go-Live Migration

During Go-Live Migration & Production Planning the Company and Customer will work together to develop both Go-Live Migration and Production Planning documents. The Production Plan details the Preinstallation, Accela back-office installation, and Accela Citizen Access installation activities for the Digital Plan Room. The Go-Live Migration Plan details how migration will take place from the Customer's existing plan review process/solution to the Digital Plan Room solution, including how to handle inflight plan review projects.

Company Responsibilities:

- Creating an initial draft of the Go-Live Migration Plan document
- Finalizing Go-Live Migration Plan document with Customer
- Creating an initial draft of the Production Plan document
- Finalizing Production Plan document with Customer
- Onsite support during Go-Live

Customer Responsibilities:

- Providing feedback on the initial draft of the Go-Live Migration Plan document
- Providing feedback on the initial draft of the Production Plan document
- Providing technical and functional user support for pre and post-Go-Live planning, execution, and monitoring
- Providing timely and appropriate responses to Accela's request for information
- Assisting in the development of a Cutover checklist that details the critical tasks that must be accomplished prior to moving to Production

● Making available the appropriate Customer key users and content experts to participate in user acceptance testing as defined and managed by Agency

Acceptance Criteria:

● Go-Live Migration Plan document finalized
● Production Plan document finalized
● ePermitHub Digital Plan Room used in the Production environment for daily use

Acceptance Review Period:

● Seven (7) business days

## Phase 1B and 2B  - Deliverable 6: Post-Go-Live and Transition to Company Support

Upon Go-Live, the Customer takes ownership of the solution in production and performs the Tier 1 and Tier 2 support functions covering Medium and Low defects as defined above in "Phase 2 - Deliverable 3: UAT". This deliverable consists of the Post Go-Live support assistance the Company provides (Tier 3) to address Critical and High issues, "Phase 2 - Deliverable 3: UAT", and provide consultative advice immediately following the move to Production for daily use.

Additionally, a formal meeting will be scheduled with the Customer, the Company Professional Services Team, and the Company Customer Support to transition support of future issues and questions from the Customer to the Company Customer Support program.

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

● 6-weeks of Post-Go-Live Support
● Finalized post-production issues list
● Resolution of all Critical and High defects as defined above in "Phase 2 - Deliverable 3: UAT"
● The transition of support from the Professional Services team to Customer Technical Support for ongoing support

Company Responsibilities:

● Daily 30-minute standing calls for first two [2] weeks following Go-Live
● Two 30-minute standing calls per week for the second two [2] weeks following Go-Live
● One 30-minute standing call per week for the third two weeks [2] following Go-Live
● Transfer ongoing support of the Customer to the Company Support program

Customer 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 the Company's request for information
- Following the post-Go-Live support period, the Customer will submit Production technical support issues through the Company Service Desk process for review and resolution

Acceptance Criteria:

- Six [6] weeks of Post Go-Live support provided
- Resolution of all Critical and High defects as defined above in "Phase 2 - Deliverable 3: UAT" discovered during Post Go-Live support period
- Transfer meeting regarding ongoing support of the Customer to the Company Support program conducted

Acceptance Review Period:

- Seven [7] days

## Risk and Issue Management

Project risks are characteristics, circumstances, or features of the project environment that may have an adverse effect on the project or the quality of its deliverables. Known risks identified with this project have been included below. A plan will be put into place to mitigate the impact of each risk on the project.

1. Current process As-Is documentation details are not enough to understand differences in future software state.
2. The gap analysis may identify additional functionality not represented during the pre-contracting process, causing an increase in scope and/or budget.
3. The integration scope is altered and extended, causing go-live issues.
4. Test plans not detailed enough to handle all business needs.
5. Equipment needed to run the software is not identified or available at the Customer site.
6. Customer staff availability for User Acceptance testing.
7. Customer staff availability for training.
8. Customer organizational change management not thorough enough to gain acceptance of new software.
9. Dependency on the Accela configuration that is required for the ePermitHub solution (i.e., configured base record types including fees, workflows, intake forms, etc.).

To mitigate and resolve project risks, the Company team will:

- Develop and maintain a Risk and Issues Management tracker to maintain collaboration between the Customer project leadership, Accela and Company implementation team.
- Work with the Customer in order to resolve or mitigate risks or issues with the objective of not compromising project deliverables
- Escalate Risks and Issues when necessary to the appropriate Customer team leadership

# Appendix B: Accela Record Types with Plan Reviews in Project Scope

- Reference Appendix A of the Accela Statement of Work for record types per phase