

## Statement of Work



**Pinellas County, FL**

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DOCUMENT CONTROL

Date	Author	Version	Change Reference
09/08/2014	Brian Heath	1.0	Initial draft
12/16/2014	Pinellas Co.	1.1	Pinellas Comments
01/09/2015	Brian Heath	1.2	Changes from conference call with Pinellas
01/20/2015	Brian Heath	1.3	Updates from conference with Pinellas
03/20/2015	Brian Heath	1.4	Updates from call with Pinellas on 3/20/2015.
06/29/2015	Walter Chavez	1.5	Updates from 6/29/2015 conference
07/31/2015	Walter Chavez	1.5.1	Updates from 7/31/2015 WebEx
10/30/2015	Walter Chavez	1.5.2	Added See-Click-Fix interface
11/13/2015	Walter Chavez	1.5.3	Added Consultant section and timeline.
12/16/2015	Walter Chavez	1.6	Added PCI section with schematic, added WebXtender to data conversion section, updated project timeline file, updated Civic Platform verbiage throughout, changed SCF from interface to support
12/18/2015	Walter Chavez	1.6.1	Updates from 12/16/18 WebEx with Pinellas. Added appendices E, F and G.
12/23/2015	Walter Chavez	1.6.2	Added R. Copeland suggested edits.
12/30/2015	Walter Chavez	1.6.3	Changes from call with F. Borgianini: moved timeline files to Appendix H.
01/19/2016	Lori Hicks	1.6.4	Final from Carahsoft
09/23/2016	Walter Chavez	1.7	Updated verbiage in Appendix H – Project Timeline
09/29/2016	Walter Chavez	1.7.1	Updated payment table per Services request.
10/14/2016	M. Freitas	1.7.1	Updated payment section.
10/17/2016	Walter Chavez	1.7.2	Updated references to appendices and other deliverables on pages 9, 12, 46 and 53.
10/18/2016	M. Freitas	1.7.3	Updated payment section
02/06/2017	W. Chavez	1.7.4	Updated Data Conversion Assumptions and renamed Automation to Civic Platform in certain instances. Added Change Orders and Projects Put on Hold sections. Updated TOC.
02/13/2017	W. Chavez	1.7.5	Added section for Appendix I (Change Order Template), and removed reference to Services Agreement from Projects Put On Hold (under Services Description).
02/21/2017	W. Chavez	1.7.6	Removed second sentences from 5 <sup>th</sup> bullet in Projects Assumptions (page 73), per F. Borgianini email on 2/16/2017 to G. Walls. Updated date and version.

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**OVERVIEW**

Congratulations on your selection of Accela, Inc., and their enterprise suite of industry leading software. The implementation of Accela products is designed specifically to meet the specific requirements and budget defined by Pinellas County, FL ("Agency"). Accela will utilize a best practice Implementation Methodology, based on previous client interactions and industry knowledge, to promote a successful project that will meet the Agency's objectives. The following Statement of Work will detail how Accela Services will implement the software you have purchased, including the major milestones and deliverables that will ensure your success.

Carahsoft Technology and Accela are committed to providing a superior software solution, and deployment of the software, for the current and future needs of the Agency. Accela will work with Agency staff to optimize Accela's portfolio of software, best practices, and customer experience to enable the Agency to successfully deploy its Accela Civic Platform software and meet its functionality, timing and cost requirements. This Statement of Work ("SOW") dated February 7, 2017 sets forth a scope and definition of the consulting/professional services, work and/or project (collectively, the "Services") to be provided by Accela ("Accela") to Agency.

**SERVICES DESCRIPTION**

**PURPOSE**

The purpose of this document is to detail the specific activities, deliverables, roles and responsibilities, and acceptance criteria that comprise the implementation of Accela Civic Platform Land Management for the Agency. Accela will provide professional services for implementation of the above modules and products per the Work Description section detailed henceforth. The following Agency departments comprise the organization scope of the implementation described herein:

- Building
- Development Review Services
- Planning
- Code Enforcement
- Utilities
- Public Works
- Solid Waste
- Air Quality

The number of workflows and record types considered in scope for this project are as follows:

- Up to 36 workflows
- Up to 100 record types

The workflows and record types may be used by the above referenced departments in a manner defined by the County. The following table shows an initial understanding of the distribution of workflows and record types.

DEPARTMENTS	WORKFLOWS	RECORD TYPES
Building	8	20
Development Review Services	10	25

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Planning	4	10
Code Enforcement	4	10
Utilities	1	8
Public Works	4	10
Solid Waste	1	2
Air Quality	4	15
TOTAL	36	100

**PROJECT TIMELINE**

The term of this project is 25 months and 1 phase.

Any delays (eg, Change in staff level/availability, missed deadlines) in the Project Timeline which by mutual agreement were created by the Agency will result in an increase in the duration of the project will require a Change Order to reimburse Accela for the additional costs associated with the delay, including but not limited to additional hours for project management, deliverable development and review.

Upon execution of this SOW, the parties will collaborate to determine a start date for Services to be rendered. Upon initiation of these Services, the Accela Project Manager will work with the Agency to collaboratively define a baseline project schedule. Given the fact that project schedules are working documents that change over the course of the project, the Accela Project Manager will work closely with Agency to update, monitor, agree, and communicate any modifications.

Preliminary project timeline is included in [Appendix H](#).

**PROJECT MANAGEMENT**

Accela will provide a full time project manager for services throughout the implementation in order to plan and monitor execution of the project in accordance with deliverables outlined in the Statement of Work. To support the implementation of the Accela Civic Platform software at the Agency, Accela will provide Project Management services throughout the project. Generally these services include the following:

- Project plan management using Microsoft Project - 2007 format,
- Project document management using Pinellas County Hosted Microsoft SharePoint project site,
- Issue log management and escalation,
- Status reporting,
- Change order management,
- Project workspace management,
- Resource management (Accela's and implementer's resources),
- Executive project oversight and quality assurance.

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

**ORGANIZATIONAL CHANGE MANAGEMENT**

The County utilizes the organizational change management (OCM) discipline for software implementations. The County will provide a dedicated Change Management Lead to spearhead all organizational change management efforts

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throughout the project to meet business, schedule, and budget objectives. OCM activities include (but are not limited to) the following:

- Prepare an organizational change management strategy addressing the “people side” of change to include plans for leadership alignment, communications, change impact analysis (through business process re-engineering) and training. The Change Management Team will focus on changes to business processes, systems, and technology, job roles, and organization structures.
- Provide consulting and partnership in planning and executing change management activities, with emphasis on maximizing employee engagement and minimizing employee resistance.
- Provide tools and techniques for identifying and mitigating change management risks.

By mutual agreement, some OCM tasks may be shared between the appropriate Accela representative(s) and the appropriate Agency representatives.

## CRITICAL SUCCESS FACTORS

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

- **Knowledge Transfer** – While Accela cannot guarantee specific expertise for Agency staff as a result of participating in the project, Accela will make all reasonable efforts to transfer knowledge to the Agency. It is critical that Agency personnel participate in the analysis, configuration and deployment of Accela Civic Platform in order to transfer knowledge to the Agency. Once Post Production assistance tasks are completed by Accela Services, the Agency assumes all day-to-day operations of Accela Civic Platform outside of the Support and Maintenance Agreement. The Service and Maintenance Agreement does not cover any Agency manipulation of implemented scripts, reports, interfaces and adapters. Key knowledge transfer areas include:
  - Configuration
  - Scripting
    - Batch scripts
    - Interfaces
    - Event Management Scripts
  - Reports and Forms
- **Dedicated Agency Participation** – Accela fully understands that Agency staff members have daily responsibilities that will compete with the amount of time that can be dedicated to the Accela Civic Platform implementation project. However, it is critical that the Agency acknowledges that its staff must be actively involved throughout the entire duration of Services as defined in the Project Plan. Accela will communicate insufficient participation of Agency and Accela resources through Project Status Reports with real and potential impacts to the project timeline. Accela will work the project sponsors and department leaders to determine appropriate team member involvement. This could run from full-time during early analysis meetings to part-time during the technical implementation phase.
- **Deliverable Acceptance Process** - Implementation services for the above products are formalized through the deliverables defined in this document. Upon completion of each deliverable according to the acceptance criteria defined herein, Accela will provide the Agency with a Deliverable Acceptance Form to formalize acceptance and completion. The Deliverable Acceptance Form is subsequently signed by the appropriate



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Agency contact, as defined in the Project Charter, and faxed/scanned/emailed or hand delivered to Accela. Please refer to [Appendix D to view a sample Deliverable Acceptance Form](#). Accela respectfully requests prompt attention to the processing of all Deliverable Acceptance Forms, as adherence to this timely process directly impacts the ability to complete the project in the desired timeframe. In order to prevent delays in the project schedule, for all Deliverables where no response time is specifically identified in the SOW, a ten (10) business day acceptance period is assumed.

- **Accela Implementation Methodology** – Accela’s successful, proven, implementation methodology is crucial to the project success. Accela’s Civic Platform software and customer base is a niche market and as such the implementation methodology may differ from other consulting firms and software packages. It is imperative to project success that the Agency is willing to adhere/adopt to the Accela Implementation Methodology.
- **Best Practice Templates** - Accela’s Best Practice Templates, or pre-built business processes, are based on direct experience with hundreds of existing customers and domain experts. These templates are complete packages of working business processes including workflows, data structures, business logic, fees, form and standard reports. These will be utilized as the baseline for the Solution Foundation for this implementation which will assist decrease risk, expedite deployment and insure a superior utilization of the Accela Civic Platform solution.

## CHANGE ORDERS

In order to make a change to the scope of Professional Services in this SOW, Agency must submit a written request to Accela specifying the proposed changes in detail. Accela shall submit to Agency an estimate of the charges and the anticipated changes in the delivery schedule that will result from the proposed change in the Professional Services (“Change Order”). Accela shall continue performing the Professional Services in accordance with the SOW until the parties agree in writing on the change in scope of work, scheduling, and fees therefore. Any Change Order shall be agreed to by the parties in writing prior to implementation of the Change Order. If Accela’s effort changes due to changes in timing, roles, responsibilities, assumptions, scope, etc. 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 shall be signed by Accela and Agency prior to commencing any activities defined in the change order. The Change Order Template is attached hereto as Appendix I.

## 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 sent to Accela in order to put the project on hold. A project can be on hold for up to 90 days without invoking the termination clause. After that time, Accela can choose to cancel the rest of the Statement of Work. To finish the project will require a new Statement of Work at new pricing.

When a project is put on hold, at minimum, Accela will need to draft a Change Order to keep some of the Accela project manager’s time engaged to monitor progress and to resource the project once it comes off hold. Other Change Order items may be needed as a result of the delay. When a project goes on hold, project resources will be re-deployed and Accela will need a forty-five (45) calendar day notice to re-staff the project. Resumption of the project will be dependent upon Accela resourcing timelines.

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Should the Agency become non-responsive to Accela communications for a term of 30 calendar days regarding continuance of the project work, Accela can choose to cancel the remainder of the Statement of Work. To finish the project will require a new Statement of Work at new pricing at the current rates.

## WORK DESCRIPTION

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

### STAGE 1 - INITIATION

#### DELIVERABLE 1: PROJECT INITIATION

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

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

- Finalize staffing for the project teams. Guidelines and recommendations for the Agency project staffing are addressed in the Project Staffing section of this document.
- Conduct a formal onsite Kickoff meeting. The objective of this meeting is to review the purpose of the project and discuss the project scope, roles and responsibilities, deliverables, and timeline.
- Establish Communication Plan and project logistics including escalation, status reporting, issue/risk management, work locations, etc.
- Establish schedule of Steering Committee meetings.
- Review and agree on Project Status Report Template format.
- Finalize and document formal deliverable signoff procedures, identify team members that will be responsible for signoff from the Agency and Accela.
- Review infrastructure requirements and preparation (with designated Agency technical staff).
- Finalize an integrated project plan that includes resource allocation for all tasks (in cooperation with the Agency Project Manager).
- Develop a Project Charter that defines how the project will be governed, including a detailed escalation plan.
- Create the project Sharepoint site and load all standard, current documentation.

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

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

- Project Charter
- Baseline Project Plan
- Project Status Report Template
- Project SharePoint Site

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- Project Kickoff Presentation

### Accela Responsibilities:

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

### Agency Responsibilities:

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

### Acceptance Criteria:

- Review and acceptance of the Project Status Report Template
- Review and acceptance of the Baseline Project Plan
- Review and acceptance of the Project Charter
- Completion of the Project Kickoff Meeting

## **DELIVERABLE 2: ACCELA CIVIC PLATFORM SETUP (SELF HOSTED)**

During the System Setup step of this project, Accela's technical staff will work with the Agency IT staff to ensure that the components for hardware, software, database, network, and Internet are in place for the test and development environments. Accela technical staff will validate the proper installation and configuration of the Accela Civic Platform environment. This Deliverable is defined as the installation of the Accela Civic Platform software on Agency computer systems, such that Agency can log into the system and verify that the software was installed. During the installation of Accela Civic Platform, documentation on the installation of Accela Civic Platform will be provided to the Agency as reference material.

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

- Installation of the Accela Civic Platform software in four (4) environments: development, test, training and production
- Demonstration of an operational Accela Civic Platform environment
- Installation documentation

Specifically, Accela will perform the following tasks within the support environment:

- Perform a remote system check of the installation.
- Install Accela software.
- Demonstrate that the Accela Civic Platform applications are operational in the Agency computing environment.

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- Provide documentation of the Agency installation.
- Configure Accela Civic Platform to use the reporting technology selected by the Agency (Crystal Reports).

### Accela Responsibilities:

- Provide timely and appropriate responses to Agency's request for information.
- Consult with Agency resources to provide technical input and answer technical questions related to the installation requirements for Accela Civic Platform.
- Deliver and install the Accela Civic Platform software on the Agency server.
- Provide hardware and installation documentation to Agency in order to facilitate procurement.

### Agency Responsibilities:

- Provide timely and appropriate responses to Accela's requests for information.
- Procure and configure necessary hardware, non-Accela systems software, and networking infrastructure as specified by Accela.
- Provide/purchase/acquire the appropriate hardware, software and infrastructure assets to support the reporting technology.
- Prepare the hardware, software, and network in accordance with the specifications provided by Accela.
- Make available the appropriate Agency key IT users to participate in any hardware, software, environment, and infrastructure meetings.
- Arrange for the availability of appropriate people for the system installation, setup, testing, and quality assurance throughout the setup process.

### Acceptance Criteria:

- Confirmation of ability to log into the Accela Civic Platform software that has been installed on Agency hardware

## STAGE 2 – TO-BE ANALYSIS

To-Be Analysis is comprised of the activities required to define the Accela Civic Platform Solution Foundation for the Agency. The key output of the process are To-Be Analysis Document(s), which serves as a 'blueprint' for design and baseline configuration efforts throughout the implementation project and establishes the benchmarks for testing and acceptance at the conclusion of the project.

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The To-Be Analysis Document(s) include detailed information on the Agency's business processes to be configured in the Accela Civic Platform Solution Foundation, including the following topics:

- Process Overview
- Intake Process, user defined and required fields
- Required/Optional Review Tasks
- Issuance requirements
- Inspection Types, scheduling and checklists
- Workflow and processing requirements
- Fee's – types, processing and schedules

The To-Be Analysis Sessions and To-Be Analysis Document(s) do not include detailed information related to the following deliverables as they are dependent on the completion of the Solution Foundation milestone.

- [Deliverable 21: Business Process Validation and Automation](#)
- [Deliverable 22: Report Specifications](#)
- [Deliverable 23: Report development](#)

The Project Team, consisting of representatives from both Accela and the Agency, will conduct a formal review of the To-Be Analysis Documents for the purpose of approval and sign-off on the deliverable. Accela will build prototypes of select processes which will be used during the review sessions to demonstrate the proposed functionality. Prototyping is intended to demonstrate selected aspects of Accela Civic Platform functionality to assist in understanding how it will operate for the Agency.

## DELIVERABLE 3 A: TO-BE ANALYSIS SESSIONS – BUILDING

In order to develop the content for the To-Be Analysis Document(s), Accela will work closely with designated Agency personnel and will conduct analysis sessions to capture the "to-be" required business processes.

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

- Review and understand existing business processes intended for migration into Accela Civic Platform.
- Review the developed business process as a basis for configuration in Accela Civic Platform's workflow tool.
- Assist the Agency in streamlining existing business processes for fit into Accela Civic Platform.
- Collect employee names and associated roles and identify user group setups.
- Review the collected document intake requirements, forms, and data fields for each process.
- Review the collected document output requirements (documents/letters/reports).
- Review the collected document fees, fee schedules, and collection procedures for each process.
- Review the collected document all required inspections and inspection result options for each type.

Accela's Project Manager will coordinate and schedule the Analysis Sessions in conjunction with the Agency Project Manager and according to the agreed upon Project Plan. In terms of specific output, the following will be executed for this deliverable:

- To-Be Analysis data gathering activities including workshops, interviews and web conferencing sessions, which will include:
  - Up to 8 workflows
  - Up to 20 record types

### Accela Responsibilities:

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- Provide timely and appropriate responses to Agency's request for information.
- Interview staff in order to understand existing business processes.
- Conduct to-be analysis sessions to capture the required business processes to be automated within the system.
- Conduct meetings via email, web conference, phone, and in person to gather and validate analysis input.

### Agency Responsibilities:

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

### Acceptance Criteria:

- Completion of To-Be Analysis Session.

## **DELIVERABLE 3 B: TO-BE ANALYSIS SESSIONS – DEVELOPMENT REVIEW SERVICES**

In order to develop the content for the To-Be Analysis Document(s), Accela will work closely with designated Agency personnel and will conduct analysis sessions to capture the "to-be" required business processes.

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

- Review and understand existing business processes intended for migration into Accela Civic Platform.
- Review the developed business process as a basis for configuration in Accela Civic Platform's workflow tool.
- Assist the Agency in streamlining existing business processes for fit into Accela Civic Platform.
- Collect employee names and associated roles and identify user group setups.
- Review the collected document intake requirements, forms, and data fields for each process.
- Review the collected document output requirements (documents/letters/reports).
- Review the collected document fees, fee schedules, and collection procedures for each process.
- Review the collected document all required inspections and inspection result options for each type.

Accela's Project Manager will coordinate and schedule the Analysis Sessions in conjunction with the Agency Project Manager and according to the agreed upon Project Plan. In terms of specific output, the following will be executed for this deliverable:

- To-Be Analysis data gathering activities including workshops, interviews and web conferencing sessions, which will include:
  - Up to 10 workflows
  - Up to 25 record types

### Accela Responsibilities:

- Provide timely and appropriate responses to Agency's request for information.
- Interview staff in order to understand existing business processes.
- Conduct to-be analysis sessions to capture the required business processes to be automated within the system.

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- Conduct meetings via email, web conference, phone, and in person to gather and validate analysis input.

### Agency Responsibilities:

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

### Acceptance Criteria:

- Completion of To-Be Analysis Session.

## **DELIVERABLE 3 C: TO-BE ANALYSIS SESSIONS – PLANNING**

In order to develop the content for the To-Be Analysis Document(s), Accela will work closely with designated Agency personnel and will conduct analysis sessions to capture the "to-be" required business processes.

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

- Review and understand existing business processes intended for migration into Accela Civic Platform.
- Review the developed business process as a basis for configuration in Accela Civic Platform's workflow tool.
- Assist the Agency in streamlining existing business processes for fit into Accela Civic Platform.
- Collect employee names and associated roles and identify user group setups.
- Review the collected document intake requirements, forms, and data fields for each process.
- Review the collected document output requirements (documents/letters/reports).
- Review the collected document fees, fee schedules, and collection procedures for each process.
- Review the collected document all required inspections and inspection result options for each type.

Accela's Project Manager will coordinate and schedule the Analysis Sessions in conjunction with the Agency Project Manager and according to the agreed upon Project Plan. In terms of specific output, the following will be executed for this deliverable:

- To-Be Analysis data gathering activities including workshops, interviews and web conferencing sessions, which will include:
  - Up to 4 workflows
  - Up to 10 record types

### Accela Responsibilities:

- Provide timely and appropriate responses to Agency's request for information.
- Interview staff in order to understand existing business processes.
- Conduct to-be analysis sessions to capture the required business processes to be automated within the system.
- Conduct meetings via email, web conference, phone, and in person to gather and validate analysis input.

### Agency Responsibilities:

- Provide timely and appropriate responses to Accela's requests for information.

## Statement of Work

- Make available the appropriate Agency key users and content experts to provide required information, participate in the configuration analysis and verify the accuracy of the documented workflows, input/output formats, and data elements.
- Provide any existing business process documentation, including process flows; fee schedules; commonly used applications, reports and forms; and other relevant information.
- Schedule participants and meeting locations for analysis activities.

### Acceptance Criteria:

- Completion of To-Be Analysis Session.

## **DELIVERABLE 3 D: TO-BE ANALYSIS SESSIONS – CODE ENFORCEMENT**

In order to develop the content for the To-Be Analysis Document(s), Accela will work closely with designated Agency personnel and will conduct analysis sessions to capture the “to-be” required business processes.

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

- Review and understand existing business processes intended for migration into Accela Civic Platform.
- Review the developed business process as a basis for configuration in Accela Civic Platform’s workflow tool.
- Assist the Agency in streamlining existing business processes for fit into Accela Civic Platform.
- Collect employee names and associated roles and identify user group setups.
- Review the collected document intake requirements, forms, and data fields for each process.
- Review the collected document output requirements (documents/letters/reports).
- Review the collected document fees, fee schedules, and collection procedures for each process.
- Review the collected document all required inspections and inspection result options for each type.

Accela’s Project Manager will coordinate and schedule the Analysis Sessions in conjunction with the Agency Project Manager and according to the agreed upon Project Plan. In terms of specific output, the following will be executed for this deliverable:

- To-Be Analysis data gathering activities including workshops, interviews and web conferencing sessions, which will include:
  - Up to 4 workflows
  - Up to 10 record types

### Accela Responsibilities:

- Provide timely and appropriate responses to Agency’s request for information.
- Interview staff in order to understand existing business processes.
- Conduct to-be analysis sessions to capture the required business processes to be automated within the system.
- Conduct meetings via email, web conference, phone, and in person to gather and validate analysis input.

### Agency Responsibilities:

- Provide timely and appropriate responses to Accela’s requests for information.
- Make available the appropriate Agency key users and content experts to provide required information, participate in the configuration analysis and verify the accuracy of the documented workflows, input/output formats, and data elements.



## Statement of Work

- Provide any existing business process documentation, including process flows; fee schedules; commonly used applications, reports and forms; and other relevant information.
- Schedule participants and meeting locations for analysis activities.

### Acceptance Criteria:

- Completion of To-Be Analysis Session.

## DELIVERABLE 3 E: TO-BE ANALYSIS SESSIONS – UTILITIES

In order to develop the content for the To-Be Analysis Document(s), Accela will work closely with designated Agency personnel and will conduct analysis sessions to capture the “to-be” required business processes.

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

- Review and understand existing business processes intended for migration into Accela Civic Platform.
- Review the developed business process as a basis for configuration in Accela Civic Platform’s workflow tool.
- Assist the Agency in streamlining existing business processes for fit into Accela Civic Platform.
- Collect employee names and associated roles and identify user group setups.
- Review the collected document intake requirements, forms, and data fields for each process.
- Review the collected document output requirements (documents/letters/reports).
- Review the collected document fees, fee schedules, and collection procedures for each process.
- Review the collected document all required inspections and inspection result options for each type.

Accela’s Project Manager will coordinate and schedule the Analysis Sessions in conjunction with the Agency Project Manager and according to the agreed upon Project Plan. In terms of specific output, the following will be executed for this deliverable:

- To-Be Analysis data gathering activities including workshops, interviews and web conferencing sessions, which will include:
  - Up to 1 workflows
  - Up to 8 record types

### Accela Responsibilities:

- Provide timely and appropriate responses to Agency’s request for information.
- Interview staff in order to understand existing business processes.
- Conduct to-be analysis sessions to capture the required business processes to be automated within the system.
- Conduct meetings via email, web conference, phone, and in person to gather and validate analysis input.

### Agency Responsibilities:

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

## Statement of Work

### Acceptance Criteria:

- Completion of To-Be Analysis Session.

## **DELIVERABLE 3 F: TO-BE ANALYSIS SESSIONS – PUBLIC WORKS**

In order to develop the content for the To-Be Analysis Document(s), Accela will work closely with designated Agency personnel and will conduct analysis sessions to capture the “to-be” required business processes.

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

- Review and understand existing business processes intended for migration into Accela Civic Platform.
- Review the developed business process as a basis for configuration in Accela Civic Platform's workflow tool.
- Assist the Agency in streamlining existing business processes for fit into Accela Civic Platform.
- Collect employee names and associated roles and identify user group setups.
- Review the collected document intake requirements, forms, and data fields for each process.
- Review the collected document output requirements (documents/letters/reports).
- Review the collected document fees, fee schedules, and collection procedures for each process.
- Review the collected document all required inspections and inspection result options for each type.

Accela's Project Manager will coordinate and schedule the Analysis Sessions in conjunction with the Agency Project Manager and according to the agreed upon Project Plan. In terms of specific output, the following will be executed for this deliverable:

- To-Be Analysis data gathering activities including workshops, interviews and web conferencing sessions, which will include:
  - Up to 4 workflows
  - Up to 10 record types

### Accela Responsibilities:

- Provide timely and appropriate responses to Agency's request for information.
- Interview staff in order to understand existing business processes.
- Conduct to-be analysis sessions to capture the required business processes to be automated within the system.
- Conduct meetings via email, web conference, phone, and in person to gather and validate analysis input.

### Agency Responsibilities:

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

### Acceptance Criteria:

- Completion of To-Be Analysis Session.

## Statement of Work

### DELIVERABLE 3 G: TO-BE ANALYSIS SESSIONS – SOLID WASTE

In order to develop the content for the To-Be Analysis Document(s), Accela will work closely with designated Agency personnel and will conduct analysis sessions to capture the “to-be” required business processes.

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

- Review and understand existing business processes intended for migration into Accela Civic Platform.
- Review the developed business process as a basis for configuration in Accela Civic Platform’s workflow tool.
- Assist the Agency in streamlining existing business processes for fit into Accela Civic Platform.
- Collect employee names and associated roles and identify user group setups.
- Review the collected document intake requirements, forms, and data fields for each process.
- Review the collected document output requirements (documents/letters/reports).
- Review the collected document fees, fee schedules, and collection procedures for each process.
- Review the collected document all required inspections and inspection result options for each type.

Accela’s Project Manager will coordinate and schedule the Analysis Sessions in conjunction with the Agency Project Manager and according to the agreed upon Project Plan. In terms of specific output, the following will be executed for this deliverable:

- To-Be Analysis data gathering activities including workshops, interviews and web conferencing sessions, which will include:
  - Up to 1 workflows
  - Up to 2 record types

#### Accela Responsibilities:

- Provide timely and appropriate responses to Agency’s request for information.
- Interview staff in order to understand existing business processes.
- Conduct to-be analysis sessions to capture the required business processes to be automated within the system.
- Conduct meetings via email, web conference, phone, and in person to gather and validate analysis input.

#### Agency Responsibilities:

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

#### Acceptance Criteria:

- Completion of To-Be Analysis Session.

## Statement of Work

### DELIVERABLE 3 H: TO-BE ANALYSIS SESSIONS – AIR QUALITY

In order to develop the content for the To-Be Analysis Document(s), Accela will work closely with designated Agency personnel and will conduct analysis sessions to capture the “to-be” required business processes.

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

- Review and understand existing business processes intended for migration into Accela Civic Platform.
- Review the developed business process as a basis for configuration in Accela Civic Platform’s workflow tool.
- Assist the Agency in streamlining existing business processes for fit into Accela Civic Platform.
- Collect employee names and associated roles and identify user group setups.
- Review the collected document intake requirements, forms, and data fields for each process.
- Review the collected document output requirements (documents/letters/reports).
- Review the collected document fees, fee schedules, and collection procedures for each process.
- Review the collected document all required inspections and inspection result options for each type.

Accela’s Project Manager will coordinate and schedule the Analysis Sessions in conjunction with the Agency Project Manager and according to the agreed upon Project Plan. In terms of specific output, the following will be executed for this deliverable:

- To-Be Analysis data gathering activities including workshops, interviews and web conferencing sessions, which will include:
  - Up to 4 workflows
  - Up to 15 record types

#### Accela Responsibilities:

- Provide timely and appropriate responses to Agency’s request for information.
- Interview staff in order to understand existing business processes.
- Conduct to-be analysis sessions to capture the required business processes to be automated within the system.
- Conduct meetings via email, web conference, phone, and in person to gather and validate analysis input.

#### Agency Responsibilities:

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

#### Acceptance Criteria:

- Completion of To-Be Analysis Session.

## Statement of Work

### **DELIVERABLE 4 A: TO-BE ANALYSIS DOCUMENT(S) – BUILDING**

To-Be Analysis Document(s) will be developed by Accela based on the information gathered in [Deliverable 3 A: To-Be Analysis Sessions - Building](#). This document(s) will serve as the 'blueprint' for the Agency's processes throughout the implementation project. Upon completion of the document(s), Accela will conduct a formal review with Agency for the purpose of approval and sign-off on the deliverable.

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

- To-Be Analysis Document(s) which will include:
  - Up to 8 workflows
  - Up to 20 record types

#### Accela Responsibilities:

- Provide timely and appropriate responses to Agency's request for information.
- Interview staff as necessary in order to understand existing business processes.
- Build selected prototypes to demonstrate proposed functionality.
- Conduct meetings via email, web conference, phone, and in person to gather and validate analysis input.
- Prepare and complete To-Be Analysis Document(s) capturing the Agency's business processes to be included in the Solution Foundation.
- Upon receipt of Agency feedback, complete the necessary changes and updates to the document.

#### Agency Responsibilities:

- Provide timely and appropriate responses to Accela's request for information.
- Schedule participants and meeting locations for To-Be Analysis Document(s) review activities.
- Review and provide initial feedback on To-Be Analysis Document(s) within ten (10) days of document submission.
- Actively participate in the reiterative process of document review until document acceptance.
- If no changes or comments are requested within the 10 days, the To-Be Analysis Document(s) is considered accepted by the Agency.
- Actively participate in the reiterative process of document review until document acceptance.
- Complete review and acceptance of document within fifteen (15) days of initial submission.

#### Acceptance Criteria:

- Review To-Be Analysis Document(s) and validate that the content accurately reflects the business processes data that will be included in the Accela Civic Platform Solution Foundation.

### **DELIVERABLE 4 B: TO-BE ANALYSIS DOCUMENT(S) – DEVELOPMENT REVIEW SERVICES**

To-Be Analysis Document(s) will be developed by Accela based on the information gathered in [Deliverable 3 B: To-Be Analysis Sessions – Development Review Services](#). This document(s) will serve as the 'blueprint' for the Agency's processes throughout the implementation project. Upon completion of the document(s), Accela will conduct a formal review with Agency for the purpose of approval and sign-off on the deliverable.

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

## Statement of Work

- To-Be Analysis Document(s) which will include:
  - Up to 10 workflows
  - Up to 25 record types

### Accela Responsibilities:

- Provide timely and appropriate responses to Agency's request for information.
- Interview staff as necessary in order to understand existing business processes.
- Build selected prototypes to demonstrate proposed functionality.
- Conduct meetings via email, web conference, phone, and in person to gather and validate analysis input.
- Prepare and complete To-Be Analysis Document(s) capturing the Agency's business processes to be included in the Solution Foundation.
- Upon receipt of Agency feedback, complete the necessary changes and updates to the document.

### Agency Responsibilities:

- Provide timely and appropriate responses to Accela's request for information.
- Schedule participants and meeting locations for To-Be Analysis Document(s) review activities.
- Review and provide initial feedback on To-Be Analysis Document(s) within ten (10) days of document submission.
- Actively participate in the reiterative process of document review until document acceptance.
- If no changes or comments are requested within the 10 days, the To-Be Analysis Document(s) is considered accepted by the Agency.
- Actively participate in the reiterative process of document review until document acceptance.
- Complete review and acceptance of document within fifteen (15) days of initial submission.

### Acceptance Criteria:

- Review To-Be Analysis Document(s) and validate that the content accurately reflects the business processes data that will be included in the Accela Civic Platform Solution Foundation.

## **DELIVERABLE 4 C: TO-BE ANALYSIS DOCUMENT(S) – PLANNING**

To-Be Analysis Document(s) will be developed by Accela based on the information gathered in [Deliverable 3 C: To-Be Analysis Sessions – Planning](#). This document(s) will serve as the 'blueprint' for the Agency's processes throughout the implementation project. Upon completion of the document(s), Accela will conduct a formal review with Agency for the purpose of approval and sign-off on the deliverable.

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

- To-Be Analysis Document(s) which will include:
  - Up to 4 workflows
  - Up to 10 record types

### Accela Responsibilities:

- Provide timely and appropriate responses to Agency's request for information.
- Interview staff as necessary in order to understand existing business processes.
- Build selected prototypes to demonstrate proposed functionality.

## Statement of Work

- Conduct meetings via email, web conference, phone, and in person to gather and validate analysis input.
- Prepare and complete To-Be Analysis Document(s) capturing the Agency's business processes to be included in the Solution Foundation.
- Upon receipt of Agency feedback, complete the necessary changes and updates to the document.

### Agency Responsibilities:

- Provide timely and appropriate responses to Accela's request for information.
- Schedule participants and meeting locations for To-Be Analysis Document(s) review activities.
- Review and provide initial feedback on To-Be Analysis Document(s) within ten (10) days of document submission.
- Actively participate in the reiterative process of document review until document acceptance.
- If no changes or comments are requested within the 10 days, the To-Be Analysis Document(s) is considered accepted by the Agency.
- Actively participate in the reiterative process of document review until document acceptance.
- Complete review and acceptance of document within fifteen (15) days of initial submission.

### Acceptance Criteria:

- Review To-Be Analysis Document(s) and validate that the content accurately reflects the business processes data that will be included in the Accela Civic Platform Solution Foundation.

## DELIVERABLE 4 D: TO-BE ANALYSIS DOCUMENT(S) – CODE ENFORCEMENT

To-Be Analysis Document(s) will be developed by Accela based on the information gathered in [Deliverable 3 D: To-Be Analysis Sessions – Code Enforcement](#). This document(s) will serve as the 'blueprint' for the Agency's processes throughout the implementation project. Upon completion of the document(s), Accela will conduct a formal review with Agency for the purpose of approval and sign-off on the deliverable.

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

- To-Be Analysis Document(s) which will include:
  - Up to 4 workflows
  - Up to 10 record types

### Accela Responsibilities:

- Provide timely and appropriate responses to Agency's request for information.
- Interview staff as necessary in order to understand existing business processes.
- Build selected prototypes to demonstrate proposed functionality.
- Conduct meetings via email, web conference, phone, and in person to gather and validate analysis input.
- Prepare and complete To-Be Analysis Document(s) capturing the Agency's business processes to be included in the Solution Foundation.
- Upon receipt of Agency feedback, complete the necessary changes and updates to the document.

### Agency Responsibilities:

- Provide timely and appropriate responses to Accela's request for information.
- Schedule participants and meeting locations for To-Be Analysis Document(s) review activities.

## Statement of Work

- Review and provide initial feedback on To-Be Analysis Document(s) within ten (10) days of document submission.
- Actively participate in the reiterative process of document review until document acceptance.
- If no changes or comments are requested within the 10 days, the To-Be Analysis Document(s) is considered accepted by the Agency.
- Actively participate in the reiterative process of document review until document acceptance.
- Complete review and acceptance of document within fifteen (15) days of initial submission.

### Acceptance Criteria:

- Review To-Be Analysis Document(s) and validate that the content accurately reflects the business processes data that will be included in the Accela Civic Platform Solution Foundation.

## **DELIVERABLE 4 E: TO-BE ANALYSIS DOCUMENT(S) – UTILITIES**

To-Be Analysis Document(s) will be developed by Accela based on the information gathered in [Deliverable 3 E: To-Be Analysis Sessions – Utilities](#). This document(s) will serve as the 'blueprint' for the Agency's processes throughout the implementation project. Upon completion of the document(s), Accela will conduct a formal review with Agency for the purpose of approval and sign-off on the deliverable.

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

- To-Be Analysis Document(s) which will include:
  - Up to 1 workflows
  - Up to 8 record types

### Accela Responsibilities:

- Provide timely and appropriate responses to Agency's request for information.
- Interview staff as necessary in order to understand existing business processes.
- Build selected prototypes to demonstrate proposed functionality.
- Conduct meetings via email, web conference, phone, and in person to gather and validate analysis input.
- Prepare and complete To-Be Analysis Document(s) capturing the Agency's business processes to be included in the Solution Foundation.
- Upon receipt of Agency feedback, complete the necessary changes and updates to the document.

### Agency Responsibilities:

- Provide timely and appropriate responses to Accela's request for information.
- Schedule participants and meeting locations for To-Be Analysis Document(s) review activities.
- Review and provide initial feedback on To-Be Analysis Document(s) within ten (10) days of document submission.
- Actively participate in the reiterative process of document review until document acceptance.
- If no changes or comments are requested within the 10 days, the To-Be Analysis Document(s) is considered accepted by the Agency.
- Actively participate in the reiterative process of document review until document acceptance.
- Complete review and acceptance of document within fifteen (15) days of initial submission.

### Acceptance Criteria:



## Statement of Work

- Review To-Be Analysis Document(s) and validate that the content accurately reflects the business processes data that will be included in the Accela Civic Platform Solution Foundation.

### DELIVERABLE 4 F: TO-BE ANALYSIS DOCUMENT(S) – PUBLIC WORKS

To-Be Analysis Document(s) will be developed by Accela based on the information gathered in [Deliverable 3 F: To-Be Analysis Sessions – Public Works](#). This document(s) will serve as the 'blueprint' for the Agency's processes throughout the implementation project. Upon completion of the document(s), Accela will conduct a formal review with Agency for the purpose of approval and sign-off on the deliverable.

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

- To-Be Analysis Document(s) which will include:
  - Up to 4 workflows
  - Up to 10 record types

#### Accela Responsibilities:

- Provide timely and appropriate responses to Agency's request for information.
- Interview staff as necessary in order to understand existing business processes.
- Build selected prototypes to demonstrate proposed functionality.
- Conduct meetings via email, web conference, phone, and in person to gather and validate analysis input.
- Prepare and complete To-Be Analysis Document(s) capturing the Agency's business processes to be included in the Solution Foundation.
- Upon receipt of Agency feedback, complete the necessary changes and updates to the document.

#### Agency Responsibilities:

- Provide timely and appropriate responses to Accela's request for information.
- Schedule participants and meeting locations for To-Be Analysis Document(s) review activities.
- Review and provide initial feedback on To-Be Analysis Document(s) within ten (10) days of document submission.
- Actively participate in the reiterative process of document review until document acceptance.
- If no changes or comments are requested within the 10 days, the To-Be Analysis Document(s) is considered accepted by the Agency.
- Actively participate in the reiterative process of document review until document acceptance.
- Complete review and acceptance of document within fifteen (15) days of initial submission.

#### Acceptance Criteria:

- Review To-Be Analysis Document(s) and validate that the content accurately reflects the business processes data that will be included in the Accela Civic Platform Solution Foundation.

### DELIVERABLE 4 G: TO-BE ANALYSIS DOCUMENT(S) – SOLID WASTE

To-Be Analysis Document(s) will be developed by Accela based on the information gathered in [Deliverable 3 G: To-Be Analysis Sessions – Solid Waste](#). This document(s) will serve as the 'blueprint' for the Agency's processes throughout

## Statement of Work

the implementation project. Upon completion of the document(s), Accela will conduct a formal review with Agency for the purpose of approval and sign-off on the deliverable.

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

- To-Be Analysis Document(s) which will include:
  - Up to 1 workflows
  - Up to 2 record types

### Accela Responsibilities:

- Provide timely and appropriate responses to Agency's request for information.
- Interview staff as necessary in order to understand existing business processes.
- Build selected prototypes to demonstrate proposed functionality.
- Conduct meetings via email, web conference, phone, and in person to gather and validate analysis input.
- Prepare and complete To-Be Analysis Document(s) capturing the Agency's business processes to be included in the Solution Foundation.
- Upon receipt of Agency feedback, complete the necessary changes and updates to the document.

### Agency Responsibilities:

- Provide timely and appropriate responses to Accela's request for information.
- Schedule participants and meeting locations for To-Be Analysis Document(s) review activities.
- Review and provide initial feedback on To-Be Analysis Document(s) within ten (10) days of document submission.
- Actively participate in the reiterative process of document review until document acceptance.
- If no changes or comments are requested within the 10 days, the To-Be Analysis Document(s) is considered accepted by the Agency.
- Actively participate in the reiterative process of document review until document acceptance.
- Complete review and acceptance of document within fifteen (15) days of initial submission.

### Acceptance Criteria:

- Review To-Be Analysis Document(s) and validate that the content accurately reflects the business processes data that will be included in the Accela Civic Platform Solution Foundation.

## **DELIVERABLE 4 H: TO-BE ANALYSIS DOCUMENT(S) – AIR QUALITY**

To-Be Analysis Document(s) will be developed by Accela based on the information gathered in [Deliverable 3 H: To-Be Analysis Sessions – Air Quality](#). This document(s) will serve as the 'blueprint' for the Agency's processes throughout the implementation project. Upon completion of the document(s), Accela will conduct a formal review with Agency for the purpose of approval and sign-off on the deliverable.

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

- To-Be Analysis Document(s) which will include:
  - Up to 4 workflows
  - Up to 15 record types

### Accela Responsibilities:

## Statement of Work

- Provide timely and appropriate responses to Agency's request for information.
- Interview staff as necessary in order to understand existing business processes.
- Build selected prototypes to demonstrate proposed functionality.
- Conduct meetings via email, web conference, phone, and in person to gather and validate analysis input.
- Prepare and complete To-Be Analysis Document(s) capturing the Agency's business processes to be included in the Solution Foundation.
- Upon receipt of Agency feedback, complete the necessary changes and updates to the document.

### Agency Responsibilities:

- Provide timely and appropriate responses to Accela's request for information.
- Schedule participants and meeting locations for To-Be Analysis Document(s) review activities.
- Review and provide initial feedback on To-Be Analysis Document(s) within ten (10) days of document submission.
- Actively participate in the reiterative process of document review until document acceptance.
- If no changes or comments are requested within the 10 days, the To-Be Analysis Document(s) is considered accepted by the Agency.
- Actively participate in the reiterative process of document review until document acceptance.
- Complete review and acceptance of document within fifteen (15) days of initial submission.

### Acceptance Criteria:

- Review To-Be Analysis Document(s) and validate that the content accurately reflects the business processes data that will be included in the Accela Civic Platform Solution Foundation.

## PROTOTYPES

To facilitate the approval process, Accela will configure prototypes of the solution for three (3) mutually agreed upon To-Be process, which will be used during the review sessions to demonstrate the proposed functionality. Prototyping is intended to demonstrate selected aspects of Accela Civic Platform functionality to assist in understanding how it will operate for the Agency.

## STAGE 3 – SOLUTION FOUNDATION

Accela will provide professional services to develop the Accela Civic Platform Solution Foundation in accordance with requirements established and agreed upon during the execution of the tasks that comprise Stage 2 – To-Be Analysis. Accela will produce a detailed, technical Solution Foundation Document(s) that represents the entire foundation of the system, for each module. This document will be delivered for review with the completed solution.

### DELIVERABLE 5 A: ACCELA CIVIC PLATFORM SOLUTION FOUNDATION – BUILDING

Accela will provide professional services to develop the Solution Foundation of the Accela Civic Platform product in accordance with requirements established and documented in [Deliverable 4 A: To-Be Analysis Document\(s\) - Building](#).

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

- Completed Foundation of Accela Civic Platform Solution that supports the To-Be Business Processes
- Accela Civic Platform Solution Foundation Document

## Statement of Work

### Accela Responsibilities:

- Provide timely and appropriate responses to Agency's request for information.
- Configure the foundational components as defined in the To-Be Analysis Document(s).

### 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 creating the system in an effort to learn about the system.
- Work with Accela to verify that the system meets the foundational requirements documented in the To-Be Analysis Document(s).
- Test the system for purposes of validating the configuration.
- Conduct initial testing and provide feedback within ten (10) days of notification that the configuration is ready for testing.
- Actively participate in the reiterative process of configuration testing until deliverable acceptance.
- Complete review and acceptance of configuration within fifteen (15) days of initial submission.

### Acceptance Criteria:

- Review and approve that the Accela Civic Platform Solution Foundation meets the requirements documented in the approved To-Be Analysis Document(s).

## **DELIVERABLE 5 B: ACCELA CIVIC PLATFORM SOLUTION FOUNDATION – DEVELOPMENT REVIEW SERVICES**

Accela will provide professional services to develop the Solution Foundation of the Accela Civic Platform product in accordance with requirements established and documented in [Deliverable 4 B: To-Be Analysis Document\(s\) – Development Review Services](#).

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

- Completed Foundation of Accela Civic Platform Solution that supports the To-Be Business Processes
- Accela Civic Platform Solution Foundation Document

### Accela Responsibilities:

- Provide timely and appropriate responses to Agency's request for information.
- Configure the foundational components as defined in the To-Be Analysis Document(s).

### 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 creating the system in an effort to learn about the system.
- Work with Accela to verify that the system meets the foundational requirements documented in the To-Be Analysis Document(s).
- Test the system for purposes of validating the configuration.
- Conduct initial testing and provide feedback within ten (10) days of notification that the configuration is ready for testing.
- Actively participate in the reiterative process of configuration testing until deliverable acceptance.

## Statement of Work

- Complete review and acceptance of configuration within fifteen (15) days of initial submission.

### Acceptance Criteria:

- Review and approve that the Accela Civic Platform Solution Foundation meets the requirements documented in the approved To-Be Analysis Document(s).

## **DELIVERABLE 5 C: ACCELA CIVIC PLATFORM SOLUTION FOUNDATION – PLANNING**

Accela will provide professional services to develop the Solution Foundation of the Accela Civic Platform product in accordance with requirements established and documented in [Deliverable 4 C: To-Be Analysis Document\(s\) - Planning](#).

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

- Completed Foundation of Accela Civic Platform Solution that supports the To-Be Business Processes
- Accela Civic Platform Solution Foundation Document

### Accela Responsibilities:

- Provide timely and appropriate responses to Agency's request for information.
- Configure the foundational components as defined in the To-Be Analysis Document(s).

### 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 creating the system in an effort to learn about the system.
- Work with Accela to verify that the system meets the foundational requirements documented in the To-Be Analysis Document(s).
- Test the system for purposes of validating the configuration.
- Conduct initial testing and provide feedback within ten (10) days of notification that the configuration is ready for testing.
- Actively participate in the reiterative process of configuration testing until deliverable acceptance.
- Complete review and acceptance of configuration within fifteen (15) days of initial submission.

### Acceptance Criteria:

- Review and approve that the Accela Civic Platform Solution Foundation meets the requirements documented in the approved To-Be Analysis Document(s).

## **DELIVERABLE 5 D: ACCELA CIVIC PLATFORM SOLUTION FOUNDATION – CODE ENFORCEMENT**

Accela will provide professional services to develop the Solution Foundation of the Accela Civic Platform product in accordance with requirements established and documented in [Deliverable 4 D: To-Be Analysis Document\(s\) – Code Enforcement](#).

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

## Statement of Work

- Completed Foundation of Accela Civic Platform Solution that supports the To-Be Business Processes
- Accela Civic Platform Solution Foundation Document

### Accela Responsibilities:

- Provide timely and appropriate responses to Agency's request for information.
- Configure the foundational components as defined in the To-Be Analysis Document(s).

### 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 creating the system in an effort to learn about the system.
- Work with Accela to verify that the system meets the foundational requirements documented in the To-Be Analysis Document(s).
- Test the system for purposes of validating the configuration.
- Conduct initial testing and provide feedback within ten (10) days of notification that the configuration is ready for testing.
- Actively participate in the reiterative process of configuration testing until deliverable acceptance.
- Complete review and acceptance of configuration within fifteen (15) days of initial submission.

### Acceptance Criteria:

- Review and approve that the Accela Civic Platform Solution Foundation meets the requirements documented in the approved To-Be Analysis Document(s).

## **DELIVERABLE 5 E: ACCELA CIVIC PLATFORM SOLUTION FOUNDATION – UTILITIES**

Accela will provide professional services to develop the Solution Foundation of the Accela Civic Platform product in accordance with requirements established and documented in [Deliverable 4 E: To-Be Analysis Document\(s\) – Utilities](#).

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

- Completed Foundation of Accela Civic Platform Solution that supports the To-Be Business Processes
- Accela Civic Platform Solution Foundation Document

### Accela Responsibilities:

- Provide timely and appropriate responses to Agency's request for information.
- Configure the foundational components as defined in the To-Be Analysis Document(s).

### 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 creating the system in an effort to learn about the system.
- Work with Accela to verify that the system meets the foundational requirements documented in the To-Be Analysis Document(s).
- Test the system for purposes of validating the configuration.

## Statement of Work

- Conduct initial testing and provide feedback within ten (10) days of notification that the configuration is ready for testing.
- Actively participate in the reiterative process of configuration testing until deliverable acceptance.
- Complete review and acceptance of configuration within fifteen (15) days of initial submission.

### Acceptance Criteria:

- Review and approve that the Accela Civic Platform Solution Foundation meets the requirements documented in the approved To-Be Analysis Document(s).

## **DELIVERABLE 5 F: ACCELA CIVIC PLATFORM SOLUTION FOUNDATION – PUBLIC WORKS**

Accela will provide professional services to develop the Solution Foundation of the Accela Civic Platform product in accordance with requirements established and documented in [Deliverable 4 F: To-Be Analysis Document\(s\) – Public Works](#).

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

- Completed Foundation of Accela Civic Platform Solution that supports the To-Be Business Processes
- Accela Civic Platform Solution Foundation Document

### Accela Responsibilities:

- Provide timely and appropriate responses to Agency's request for information.
- Configure the foundational components as defined in the To-Be Analysis Document(s).

### 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 creating the system in an effort to learn about the system.
- Work with Accela to verify that the system meets the foundational requirements documented in the To-Be Analysis Document(s).
- Test the system for purposes of validating the configuration.
- Conduct initial testing and provide feedback within ten (10) days of notification that the configuration is ready for testing.
- Actively participate in the reiterative process of configuration testing until deliverable acceptance.
- Complete review and acceptance of configuration within fifteen (15) days of initial submission.

### Acceptance Criteria:

- Review and approve that the Accela Civic Platform Solution Foundation meets the requirements documented in the approved To-Be Analysis Document(s).

## **DELIVERABLE 5 G: ACCELA CIVIC PLATFORM SOLUTION FOUNDATION – SOLID WASTE**

Accela will provide professional services to develop the Solution Foundation of the Accela Civic Platform product in accordance with requirements established and documented in [Deliverable 4 G: To-Be Analysis Document\(s\) – Solid Waste](#).

## Statement of Work

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

- Completed Foundation of Accela Civic Platform Solution that supports the To-Be Business Processes
- Accela Civic Platform Solution Foundation Document

### Accela Responsibilities:

- Provide timely and appropriate responses to Agency's request for information.
- Configure the foundational components as defined in the To-Be Analysis Document(s).

### 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 creating the system in an effort to learn about the system.
- Work with Accela to verify that the system meets the foundational requirements documented in the To-Be Analysis Document(s).
- Test the system for purposes of validating the configuration.
- Conduct initial testing and provide feedback within ten (10) days of notification that the configuration is ready for testing.
- Actively participate in the reiterative process of configuration testing until deliverable acceptance.
- Complete review and acceptance of configuration within fifteen (15) days of initial submission.

### Acceptance Criteria:

- Review and approve that the Accela Civic Platform Solution Foundation meets the requirements documented in the approved To-Be Analysis Document(s).

## **DELIVERABLE 5 H: ACCELA CIVIC PLATFORM SOLUTION FOUNDATION – AIR QUALITY**

Accela will provide professional services to develop the Solution Foundation of the Accela Civic Platform product in accordance with requirements established and documented in [Deliverable 4 H: To-Be Analysis Document\(s\) – Air Quality](#).

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

- Completed Foundation of Accela Civic Platform Solution that supports the To-Be Business Processes
- Accela Civic Platform Solution Foundation Document

### Accela Responsibilities:

- Provide timely and appropriate responses to Agency's request for information.
- Configure the foundational components as defined in the To-Be Analysis Document(s).

### 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 creating the system in an effort to learn about the system.
- Work with Accela to verify that the system meets the foundational requirements documented in the To-Be Analysis Document(s).



## Statement of Work

- Test the system for purposes of validating the configuration.
- Conduct initial testing and provide feedback within ten (10) days of notification that the configuration is ready for testing.
- Actively participate in the reiterative process of configuration testing until deliverable acceptance.
- Complete review and acceptance of configuration within fifteen (15) days of initial submission.

### Acceptance Criteria:

- Review and approve that the Accela Civic Platform Solution Foundation meets the requirements documented in the approved To-Be Analysis Document(s).

## STAGE 4 – BUILD

The Build stage includes data conversions, development of interfaces, development of Accela Event Manager Scripts and custom report development. It comprises all of the additional critical activities outside of solution foundation that has been configured for the Agency. Similar to the Configuration Stage, it is critical that appropriate agency representatives are involved in each step of the process to ensure success.

Data conversion of historic/legacy data from Agency systems is a critical activity for the success of this project. The Accela team is highly experienced in planning for, and executing these activities and will work closely with Agency staff to ensure a successful transition of data. Specifically, the Accela team will work with Agency to understand the data sources, how they are used, where their data will be stored in Accela Civic Platform and the quality of that data. Often multiple sources store and manage similar information and decisions need to be made about the authoritative source. It is also common to find that data sources have not had strong controls and the accuracy is questionable or there is missing data. There are techniques and tools that Accela may recommend to understand the current state of Agency data so that decisions can be made about data quality and what to convert. Upon completion of the data analysis, mapping of historical/legacy data sources may begin with Accela's mapping tool and conversion iterations performed as outlined in the Project Plan. Accela provides release notes during these conversion tests to verify data is being transferred correctly (e.g., number of records and expected values in fields).

Accela will lead the conversion effort and specifically assist in the following areas: data mapping, script development for conversion, assistance in data testing and validation, and with the planning and execution of the final data conversion. For conversions, it is expected and anticipated that the Agency will provide resources knowledgeable with the historical data to assist in the data migration/conversion effort.

The required data mapping effort will be a conducted by Accela personnel with assistance from the Agency. Once the data mapping has been defined, Accela will ask that a representative of the Agency sign off on the data maps. Accela will be responsible for the data conversion programs to load data from the staging tables to the Accela Civic Platform database. **PLEASE REFER TO [APPENDIX B](#) FOR SPECIFIC ASSUMPTIONS AND PARAMETERS RELATED TO ACCELA 'S CONVERSION APPROACH.**

## DATA CONVERSIONS

The following data conversions are in scope for this project:

- **Permits Plus**
- **Air Quality**
- **Natural Resources Enforcement**

## Statement of Work

- Water & Navigation
- Mangroves
- Complaints
- APO (Address, Parcel Owner)
- Licensed Professional
- ApplicationXtender

## DATA CONVERSION ANALYSIS

Upon receipt of Agency's data, Accela will create a Data Conversion Mapping Document for each data conversion in scope for this project listed above, detailing the data conversion process, mutually agreed upon requirements and mapping of Agency's historical data into Accela Civic Platform.

In terms of specific output, the following will be executed for each data conversion deliverable:

- Data Conversion Mapping Document

### Accela Responsibilities:

- Work with the Agency to define and document historical data elements that are required for the conversion.
- Facilitate the data analysis and mapping process
- Complete the Data Conversion Specifications Document.

### Agency Responsibilities:

- Provide data in acceptable formats.
- Provide subject matter experts on the data source to aid Accela in identifying key components of the data
- Provide subject matter experts on the configuration of current system to aid in the data mapping process
- Review and sign-off on completed Data Conversion Specifications document.

### Acceptance Criteria:

- The Data Conversion Specifications document identifies data elements that will be converted into Accela Civic Platform as well as document special consideration (ex. merging data sources, phasing, etc.)

### Acceptance Review Period:

- Fifteen (15) business days total

## DELIVERABLE 6: PERMITS PLUS DATA CONVERSION DEVELOPMENT

Upon Agency approval of the **Permits Plus** Conversion Specifications document, Accela will provide a program(s) to migrate appropriate historical data into Accela Civic Platform. Upon receipt of the conversion from Accela, the Agency DBA will load the data into the Test environment for validation.

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

- Completion of migrated data into Accela Civic Platform development or test environment.

### Accela Responsibilities:

## Statement of Work

- Provide a program to migrate historical data into the Agency's AA test database environment.
- Each data conversion will include up to five (5) conversion loads for client testing
- Validate the successful completion of the migration of historical data into the Agency's test environment.

### Agency Responsibilities:

- Providing the legacy data source in an accepted format
- Assist in the execution of the data conversion program and provide access to environments as needed
- Provide resources to validate the conversion statistics and the quality of the data converted into Accela Civic Platform

### Acceptance Criteria:

- Historical data has been converted to Accela Civic Platform testing environment according to the Data Conversion Mapping document.

### Acceptance Review Period:

- Fifteen (15) business days total

## DELIVERABLE 7: AIR QUALITY CONVERSION DEVELOPMENT

Upon Agency approval of the **Air Quality** Conversion Specifications document, Accela will provide a program(s) to migrate appropriate historical data into Accela Civic Platform. Upon receipt of the conversion from Accela, the Agency DBA will load the data into the Test environment for validation.

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

- Completion of migrated data into Accela Civic Platform development or test environment.

### Accela Responsibilities:

- Provide a program to migrate historical data into the Agency's AA test database environment.
- Each data conversion will include up to five (5) conversion loads for client testing
- Validate the successful completion of the migration of historical data into the Agency's test environment.

### Agency Responsibilities:

- Providing the legacy data source in an accepted format
- Assist in the execution of the data conversion program and provide access to environments as needed
- Provide resources to validate the conversion statistics and the quality of the data converted into Accela Civic Platform

### Acceptance Criteria:

- Historical data has been converted to Accela Civic Platform testing environment according to the Data Conversion Mapping document.

### Acceptance Review Period:

- Fifteen (15) business days total

## Statement of Work

### **DELIVERABLE 8: NATURAL RESOURCES ENFORCEMENT CONVERSION DEVELOPMENT**

Upon Agency approval of the **Natural Resources Enforcement** Conversion Specifications document, Accela will provide a program(s) to migrate appropriate historical data into Accela Civic Platform. Upon receipt of the conversion from Accela, the Agency DBA will load the data into the Test environment for validation.

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

- Completion of migrated data into Accela Civic Platform development or test environment.

#### Accela Responsibilities:

- Provide a program to migrate historical data into the Agency's AA test database environment.
- Each data conversion will include up to five (5) conversion loads for client testing
- Validate the successful completion of the migration of historical data into the Agency's test environment.

#### Agency Responsibilities:

- Providing the legacy data source in an accepted format
- Assist in the execution of the data conversion program and provide access to environments as needed
- Provide resources to validate the conversion statistics and the quality of the data converted into Accela Civic Platform

#### Acceptance Criteria:

- Historical data has been converted to Accela Civic Platform testing environment according to the Data Conversion Mapping document.

#### Acceptance Review Period:

- Fifteen (15) business days total

### **DELIVERABLE 9: WATER & NAVIGATION CONVERSION DEVELOPMENT**

Upon Agency approval of the **Water & Navigation** Conversion Specifications document, Accela will provide a program(s) to migrate appropriate historical data into Accela Civic Platform. Upon receipt of the conversion from Accela, the Agency DBA will load the data into the Test environment for validation.

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

- Completion of migrated data into Accela Civic Platform development or test environment.

#### Accela Responsibilities:

- Provide a program to migrate historical data into the Agency's AA test database environment.
- Each data conversion will include up to five (5) conversion loads for client testing
- Validate the successful completion of the migration of historical data into the Agency's test environment.

#### Agency Responsibilities:

- Providing the legacy data source in an accepted format
- Assist in the execution of the data conversion program and provide access to environments as needed

## Statement of Work

- Provide resources to validate the conversion statistics and the quality of the data converted into Accela Civic Platform

### Acceptance Criteria:

- Historical data has been converted to Accela Civic Platform testing environment according to the Data Conversion Mapping document.

### Acceptance Review Period:

- Fifteen (15) business days total

## DELIVERABLE 10: MANGROVES CONVERSION DEVELOPMENT

Upon Agency approval of the **Mangroves** Conversion Specifications document, Accela will provide a program(s) to migrate appropriate historical data into Accela Civic Platform. Upon receipt of the conversion from Accela, the Agency DBA will load the data into the Test environment for validation.

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

- Completion of migrated data into Accela Civic Platform development or test environment.

### Accela Responsibilities:

- Provide a program to migrate historical data into the Agency's AA test database environment.
- Each data conversion will include up to five (5) conversion loads for client testing
- Validate the successful completion of the migration of historical data into the Agency's test environment.

### Agency Responsibilities:

- Providing the legacy data source in an accepted format
- Assist in the execution of the data conversion program and provide access to environments as needed
- Provide resources to validate the conversion statistics and the quality of the data converted into Accela Civic Platform

### Acceptance Criteria:

- Historical data has been converted to Accela Civic Platform testing environment according to the Data Conversion Mapping document.

### Acceptance Review Period:

- Fifteen (15) business days total

## DELIVERABLE 11: COMPLAINTS CONVERSION DEVELOPMENT

Upon Agency approval of the **Complaints** Conversion Specifications document, Accela will provide a program(s) to migrate appropriate historical data into Accela Civic Platform. Upon receipt of the conversion from Accela, the Agency DBA will load the data into the Test environment for validation.

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

## Statement of Work

- Completion of migrated data into Accela Civic Platform development or test environment.

### Accela Responsibilities:

- Provide a program to migrate historical data into the Agency's AA test database environment.
- Each data conversion will include up to five (5) conversion loads for client testing
- Validate the successful completion of the migration of historical data into the Agency's test environment.

### Agency Responsibilities:

- Providing the legacy data source in an accepted format
- Assist in the execution of the data conversion program and provide access to environments as needed
- Provide resources to validate the conversion statistics and the quality of the data converted into Accela Civic Platform

### Acceptance Criteria:

- Historical data has been converted to Accela Civic Platform testing environment according to the Data Conversion Mapping document.

### Acceptance Review Period:

- Fifteen (15) business days total

## **DELIVERABLE 12: ADDRESS PARCEL OWNER (APO) CONVERSION DEVELOPMENT**

Upon Agency approval of the **APO** Conversion Specifications document, Accela will provide a program(s) to migrate appropriate historical data into Accela Civic Platform. Upon receipt of the conversion from Accela, the Agency DBA will load the data into the Test environment for validation.

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

- Completion of migrated data into Accela Civic Platform development or test environment.

### Accela Responsibilities:

- Provide a program to migrate historical data into the Agency's AA test database environment.
- Each data conversion will include up to five (5) conversion loads for client testing
- Validate the successful completion of the migration of historical data into the Agency's test environment.

### Agency Responsibilities:

- Providing the legacy data source in an accepted format
- Assist in the execution of the data conversion program and provide access to environments as needed
- Provide resources to validate the conversion statistics and the quality of the data converted into Accela Civic Platform

### Acceptance Criteria:

- Historical data has been converted to Accela Civic Platform testing environment according to the Data Conversion Mapping document.

### Acceptance Review Period:

Statement of Work

- Fifteen (15) business days total

**DELIVERABLE 13: LICENSED PROFESSIONAL CONVERSION DEVELOPMENT**

Upon Agency approval of the **Licensed Professional** Conversion Specifications document, Accela will provide a program(s) to migrate appropriate historical data into Accela Civic Platform. Upon receipt of the conversion from Accela, the Agency DBA will load the data into the Test environment for validation.

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

- Completion of migrated data into Accela Civic Platform development or test environment.

Accela Responsibilities:

- Provide a program to migrate historical data into the Agency's AA test database environment.
- Each data conversion will include up to five (5) conversion loads for client testing
- Validate the successful completion of the migration of historical data into the Agency's test environment.

Agency Responsibilities:

- Providing the legacy data source in an accepted format
- Assist in the execution of the data conversion program and provide access to environments as needed
- Provide resources to validate the conversion statistics and the quality of the data converted into Accela Civic Platform

Acceptance Criteria:

- Historical data has been converted to Accela Civic Platform testing environment according to the Data Conversion Mapping document.

Acceptance Review Period:

- Fifteen (15) business days total

**DELIVERABLE 14: APPLICATIONXTENDER CONVERSION DEVELOPMENT**

Upon Agency approval of the **ApplicationXtender** Conversion Specifications document, Accela will provide a program(s) to migrate appropriate historical data into Accela Civic Platform. Upon receipt of the conversion from Accela, the Agency DBA will load the data into the Test environment for validation.

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

- Completion of migrated data into Accela Civic Platform development or test environment.

Accela Responsibilities:

- Provide a program to migrate historical data into the Agency's AA test database environment.
- Each data conversion will include up to five (5) conversion loads for client testing
- Validate the successful completion of the migration of historical data into the Agency's test environment.

Agency Responsibilities:

## Statement of Work

- Providing the legacy data source in an accepted format
- Assist in the execution of the data conversion program and provide access to environments as needed
- Provide resources to validate the conversion statistics and the quality of the data converted into Accela Civic Platform

### Acceptance Criteria:

- Historical data has been converted to Accela Civic Platform testing environment according to the Data Conversion Mapping document.

### Acceptance Review Period:

- Fifteen (15) business days total

## SYSTEM INTERFACES

The following system interfaces are in scope for this project:

- **Financials**
- **Property Appraiser**
- **Pinellas County Construction Licensing Board (PCCLB)**
- **PayPal Payflow Payment Adapter**
- **See-Click-Fix Interface Support**
- **Selectron IVR Interface Support**

For each interface, the Accela technical lead will work together with Agency's technical lead and business leads to document functional and technical requirements of the interface in an Interface Specifications Document. Interface development begins upon written approval of the specifications. It is expected all interfaces will use Accela's GovXML, 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, Agency will ensure that Accela resources have access to a Dev or Test version of the 3<sup>rd</sup> party system for interface development. All interfaces will be developed against 1 (one), agreed upon version of the 3<sup>rd</sup> party system.

## DELIVERABLE 15: FINANCIALS INTERFACE

Accela will provide an interface between Accela Civic Platform and an Agency **Financial System Oracle E-Business Suite**. This interface will export fees paid in the Accela system to the Agency's Financial System. In order to determine the Agency requirements for this interface, analysis sessions will be conducted as a portion of this deliverable. The findings will then be documented in the Interface Specifications Document for use by Accela in building the interface code. The implementation of the interface is dependent on the assistance of the Agency's staff, specifically, interface analysis, data mapping, and data manipulation as required in the source system. Accela will provide a program to integrate 3<sup>rd</sup> Party data **from** Accela Civic Platform **nightly**.

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

- Interface Specifications Document
- Operational Interface in the Development or Test environment



## Statement of Work

### Accela Responsibilities:

- Provide timely and appropriate responses to Agency's request for information.
- Conduct Interface Analysis sessions for a nightly batch interface with Financial System.
- Work with Agency staff to develop interface specifications document.
- Use an Accela web service or other tool to implement the interface functionality based on the specifications.
- Build all aspects of the nightly batch interface that interact directly with the Accela Civic Platform.

### Agency Responsibilities:

- Provide timely and appropriate responses to Accela's request for information.
- Provide system and access to individuals to provide required details of system interface.
- Allocate the time for qualified business and technical experts for the testing sessions that are critical to the project success.
- Identify and coordinate any related tools used to implement the interface (3rd party or in-house development).
- Assist in the interface specifications development and data mapping process.
- Review and approve the interface specifications document.
- Work with Third Party Data Sources to determine best methods of interfacing to Accela system.
- Validate interface through testing.
- Work with Financial System Data Source software to ensure data from Accela is in correct format.
- Updates to interface, post go-live, due to changes in 3<sup>rd</sup> party system or Agency business processes.

### Acceptance Criteria:

- Review and approve the Interface Specifications document.
- Demonstration and approval of the completed interface as per the requirements detailed in the interface specifications document. The Agency will not withhold acceptance if the Agency opts to complete the task using Agency or third party resources.

### Acceptance Review Period:

- Fifteen (15) business days total

## **DELIVERABLE 16: PROPERTY APPRAISER INTERFACE**

Accela will provide an interface between Accela Civic Platform and the **Property Appraiser System**. This interface will export building permit data processed for the month in the Accela system to the Property Appraiser System. In order to determine the Agency requirements for this interface, analysis sessions will be conducted as a portion of this deliverable. The findings will then be documented in the Interface Specifications Document for use by Accela in building the interface code. The implementation of the interface is dependent on the assistance of the Agency's staff, specifically, interface analysis, data mapping, and data manipulation as required in the source system. Accela will provide a program to integrate 3<sup>rd</sup> Party data **from** Accela Civic Platform on a **monthly** basis.

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

- Interface Specifications Document
- Operational interface in the Development or Test environment

## Statement of Work

### Accela Responsibilities:

- Provide timely and appropriate responses to Agency's request for information.
- Conduct Interface Analysis sessions for a monthly batch interface with Property Appraiser System.
- Work with Agency staff to develop interface specifications during configuration.
- Use an Accela web service or other tool to implement interface functionality based on the specifications.
- Build all aspects of the nightly batch interface that interact directly with the Accela Civic Platform.

### Agency Responsibilities:

- Provide timely and appropriate responses to Accela's request for information.
- Provide system and access to individuals to provide required details of system interface.
- Allocate the time for qualified business and technical experts for the testing sessions that are critical to the project success.
- Identify and coordinate any related tools used to implement the interface (3rd party or in-house development).
- Assist in the interface specifications development and data mapping process.
- Review and approve the interface specifications document.
- Work with Third Party Data Sources to determine best methods of interfacing to Accela system.
- Validate interface through testing.
- Work with Property Appraiser System Data Source software to ensure data from Accela is in correct format.
- Updates to interface, post go-live, due to changes in 3<sup>rd</sup> party system or Agency business processes.

### Acceptance Criteria:

- Review and approve the Interface Specifications document.
- Demonstration of the interface meeting the specific requirements detailed in the interface specifications document. The Agency will not withhold acceptance if the Agency opts to complete the task using Agency or third party resources.

### Acceptance Review Period:

- Fifteen (15) business days total

## **DELIVERABLE 17: CONSTRUCTION LICENSING BOARD (PCCLB) INTERFACE**

Accela will provide an interface between Accela Civic Platform and the **Construction Licensing Board (PCCLB) System**. This interface will import license expiration data from the PCCLB System to the Accela system. In order to determine the Agency requirements for this interface, analysis sessions will be conducted as a portion of this deliverable. The findings will then be documented in the Interface Specifications Document for use by Accela in building the interface code. The implementation of the interface is dependent on the assistance of the Agency's staff, specifically, interface analysis, data mapping, and data manipulation as required in the source system. Accela will provide a program to integrate 3<sup>rd</sup> Party data to Accela Civic Platform on a **daily** basis.

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

- Interface Specifications Document
- Operational interface in the Development or Test environment

### Accela Responsibilities:

## Statement of Work

- Provide timely and appropriate responses to Agency's request for information.
- Conduct Interface Analysis sessions for a monthly batch interface with PCCLB System.
- Work with Agency staff to develop interface specifications during configuration.
- Use an Accela web service or other tool to implement interface functionality based on the specifications.
- Build all aspects of the nightly batch interface that interact directly with the Accela Civic Platform.

### Agency Responsibilities:

- Provide timely and appropriate responses to Accela's request for information.
- Provide system and access to individuals to provide required details of system interface.
- Allocate the time for qualified business and technical experts for the testing sessions that are critical to the project success.
- Identify and coordinate any related tools used to implement the interface (3rd party or in-house development).
- Assist in the interface specifications development and data mapping process.
- Review and approve the interface specifications document.
- Work with Third Party Data Sources to determine best methods of interfacing to Accela system.
- Validate interface through testing.
- Updates to interface, post go-live, due to changes in 3<sup>rd</sup> party system or Agency business processes.

### Acceptance Criteria:

- Review and approve the Interface Specifications document.
- Demonstration of the interface meeting the specific requirements detailed in the interface specifications document. The Agency will not withhold acceptance if the Agency opts to complete the task using Agency or third party resources.

### Acceptance Review Period:

- Fifteen (15) business days total

## **DELIVERABLE 18: PAYPAL PAYFLOW PAYMENT ADAPTER INTERFACE**

Accela will develop an interface between Accela Civic Platform and the **PayPal PayFlow System** for electronic payments. Specifically, Accela will utilize/update the standard E-Payment adaptor to the PayPal PayFlow system for both **ACA (Accela Citizen Access)** and the **backend Accela Civic Platform**. It is assumed that all departments will be using the same version of the PayPal PayFlow system for payment processing.

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

- Interface Specifications Document
- Demonstration of operational interface between ACA and Accela Civic Platform and the PayPal PayFlow system in the development or test environment.

### Accela Responsibilities:

- Provide timely and appropriate responses to Agency's request for information.
- Work with Agency staff to develop interface specifications with the specified version of PayPal PayFlow.
- Use an Accela web service or other tool to implement interface functionality based on the specifications.
- Assist the Agency with testing and debugging of the interface.

## Statement of Work

### Agency Responsibilities:

- Provide timely and appropriate responses to Accela's request for information.
- Allocate the time for qualified business and technical experts for the testing sessions that are critical to the project success.
- Identify and coordinate any related tools used to implement the interface (3rd party or in-house development).
- Assist in the interface specifications development and data mapping process.
- Review and approve the interface specifications document.
- Allocate the time for qualified personnel to test the interface for acceptance to ensure that the data populates successfully according to the interface specifications documents.
- Updates to interface, post go-live, due to changes in 3<sup>rd</sup> party system or Agency business processes.

### Acceptance Criteria:

- Review and approval of the Interface Specifications document.
- Demonstration of the interface meeting the specific requirements detailed on the interface specifications document. The Agency will not withhold acceptance if the Agency opts to complete the task using Agency or third party resources.

### Acceptance Review Period:

- Fifteen (15) business days total

## **DELIVERABLE 19: SEE-CLICK-FIX INTEFACE SUPPORT**

The See-Click-Fix (SCF) interface will be provided by SCF. Agency will work directly with SCF to define the specifications and deliverable goals. Accela will provide support and expertise to SCF and the Agency for the deliverable of this interface. Accela has allocated 40 hours for this deliverable.

## **DELIVERABLE 20: SELECTRON IVR INTEFACE SUPPORT**

The Selectron IVR interface will be provided by Selectron. Agency will work directly with Selectron to define the specifications and deliverable goals. Accela will provide support and expertise to Selectron and the Agency for the deliverable of this interface. An estimate of 8 hours has been allocated for this deliverable.

## **DELIVERABLE 21: BUSINESS PROCESS VALIDATION AND AUTOMATION**

During the configuration analysis phase of the implementation project, Accela will identify opportunities to supplement the Accela Civic Platform base functionality via Event Manager Script Engine (EMSE) script development. Accela will work with key Agency project stakeholders to identify the business rules/processes to be automated. Accela will work with Agency to identify desired EMSE functionality, and subsequently will help prioritize the scripting needs to determine which scripts will be developed by Accela, and which scripts can be developed by the Agency. The scripts developed by Accela can be used as models whereby agency staff can develop and modify additional EMSE scripts as needed. An estimate of 700 hours has been allocated for Business Process Validation and Automation.

Representative examples of business processes that could be automated by a script listed below. Note that the below list is an example list only and not a list of the actual script(s) that will be developed for the project.

## Statement of Work

- Closing workflows based on inspection results
  - Use Case: Final Inspection is complete, update workflow;
- Automatic assessment of complex fee calculations
  - Use Case: Auto fee calculation, assessment, and invoicing upon application submittal;
- Increment a date based on workflow status change
  - Use Case: Expiration on Permit is made current every time a workflow is updated;
- Preventing inspections based on various criteria
  - Use Case: Depending on workflow / application status, do not allow an inspection to take place.

Prior to the development of a script, the Agency will approve a design specification document that will be created jointly by the Agency and Accela. The approved document will be used as a basis for determining completion and approval of the deliverable.

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

- Prioritized list of requirements that require Automation
- Specification documents for each required Automation
- Demonstration of completed Automations in development or test environments per the specifications document(s)

### Accela Responsibilities:

- Work with Agency staff to identify potential uses of EMSE scripting.
- Assist with development of list of desired EMSE functionality.
- Aid the Agency in prioritizing which scripts will be developed by Accela.
- Develop EMSE scripts based on the specifications.
- Demonstrate functionality of scripts per specifications.

### Agency Responsibilities:

- Allocate the time for qualified business and technical experts for the script requirements sessions that are critical to the project success.
- Identify resources that will learn EMSE scripting tools and approaches for ongoing maintenance.
- Prioritize desired EMSE functionality to determine which scripts Accela will develop.
- Provide timely and appropriate responses to Accela's request for information.
- Verify the Event Script Specification meets the intended business requirement.
- Allocate the time for qualified personnel to test the script for acceptance.
- Ensure that the data populates successfully according to the script requirements document.

## REPORTS

Reports are defined as anything that can be printed from the system, including but not limited to, reports, forms, documents, notices, and letters that the Agency wishes to print as identified during configuration analysis. The Configuration Document will define the reports and documents that are required by the Agency to effectively use Accela Civic Platform. These reports will be broken down by level of effort and identified in the configuration document. It is expected that, after the appropriate training on the database and the selected report writing tool is completed, Agency personnel will be able to handle additional and future report requirements. Reports are classified

## Statement of Work

by level of effort: high, medium, and low. High is defined as a report containing significant calculation and/or extensive detail and number of fields – for example a financial statistical report or complex permit. The majority of reports require a ‘medium’ level of effort, which is defined as a report displaying non-calculated and minimal calculated data fields. Reports with a low level of effort are typically letters or notices that contain contact information and basic application data.

These reports can be developed using the integral Accela Report Writer included with Accela Civic Platform, Microsoft Report Service (SRS) or Crystal Reports XI Server at the Agency’s discretion. These custom reports, whether developed with Accela Report Writer, SRS or Crystal Reports, will be deployed in the Report Manager for use within Accela Civic Platform.

## DELIVERABLE 22: REPORT SPECIFICATIONS

Accela will develop documents/letters/reports from those identified by the Agency as required for the new system. Accela and Agency have agreed that Accela will develop reports based on the following breakdown:

- 8 number of High Complexity
- 14 number of Medium Complexity
- 8 number of Low Complexity

Prior to the development of a report the Agency will approve report design specification documents that will be created jointly by the Agency and Accela. The approved documents will be used as a basis for determining completion and approval of the reports. Development of each report cannot begin until agreement on each specification is complete.

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

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

- List of identified reports with assigned responsibility for specification and development
- Completed Report Specification Documents for each report assigned to Accela

### Accela Responsibilities:

- Assist in determining level of effort for reports to assist with prioritization.
- Develop report specifications.

### Agency Responsibilities:

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

### Acceptance Criteria:

- Agreement on prioritized list of reports that will be developed by Accela.
- Review and approval of individual Report Specifications documents. The Agency will not withhold acceptance if the Agency requests changes to the reports specifications after the initial signoff of the specification by the Agency.

## Statement of Work

- Agency will have 10 business days to review the Report Specification Documents. If no changes or comments are requested within the 10 days, the Report Specification Documents are considered approved by the Agency.

### DELIVERABLE 23: REPORT DEVELOPMENT

Accela will develop custom documents/letters/reports per the specifications developed and approved in [Deliverable 22, Report Specifications](#). Changes to the report specifications after approval can negatively impact project progress and the overall schedule. Therefore, changes to the report specifications after approval requires an analysis by Accela to determine the level of effort required, and if a change order would be required to complete the work.

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

- A total of 30 documents/letters/custom reports per the Report Specification Documents

#### Accela Responsibilities:

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

#### Agency Responsibilities:

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

#### Acceptance Criteria:

- Confirmation of report accuracy in the development or test environment per Report Specifications.

### DELIVERABLE 24: ACCELA GIS CONFIGURATION

Accela will install and configure Accela GIS to link and leverage existing Agency GIS information, including assistance with establishing the map service to be used in conjunction 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 Permitting system.
- 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 (including ACA).
- View permits, enforcement, inspections, zoning, land use, etc.
  - Graphically display these items (spacially arranged) by parcel ID, address, and zones
  - Search by attribute
- Eliminate duplicate data (define system of record for each data type)
- View districts: fire districts, water, sewer, etc.
- Analyze trends
- Track parcel splits and combines and rights of way vacations from the Property Appraiser (need business process)

## Statement of Work

- Chronology:
  - Non-spatial information in Accela Civic Platform
  - Spatial information in GIS (Note: mapping only incorporates current information)
- Mobile capabilities:
  - Online and Offline
  - Ability to redline
  - GPS integrated into tablets

During GIS installation, 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 Accela GIS test and production environments. Accela technical staff will validate the proper installation and configuration of the Accela GIS environment.

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

- Accela GIS installed on Agency server(s)
- 3 Proximity Alerts
- 6 Dynamic Themes
- 3 Attribute Mapping

### Accela Responsibilities:

- Install Accela software and perform quality assurance checks on the configuration and performance based on acceptance criteria mutually developed by Accela and the Agency.
- Demonstrate that the Accela GIS applications are operational in the Agency computing environment thus communicating with the Accela Civic Platform system.
- Assist the Agency in identifying and developing Proximity Alerts and Dynamic Themes

### Agency Responsibilities:

- Arrange for the availability of appropriate staff for the system installation, setup, testing, and quality assurance throughout the setup process.
- Order and procure necessary hardware, non-Accela systems software, and networking infrastructure as specified by Accela.
- Provide people and physical resources based on the dates outlined in the project schedule.
- Prepare the hardware, software, and network in accordance with the specifications provided by Accela.
- Provide Accela with network access for remote installation and testing.
- Provide information and data in the formats specified by Accela that will be needed for the GIS implementation.

### Acceptance Criteria:

- Demonstration of operating Accela GIS in test environment.

## **DELIVERABLE 25: ACCELA CITIZEN ACCESS CONFIGURATION**

This deliverable includes setup and configuration of Accela Citizen Access (ACA) on the Agency Dev or Test site. Accela will work with the Agency representatives to assess and implement Accela Citizen Access to extend certain aspects of the internal Accela Civic Platform configuration for use by the general public.

Features available for configuration include:



## Statement of Work

### (Permit/License/Complaint/Cases) Research

- Permit Application and Issuance
- License Renewals
- Inspection Request Entry
- Inspection Results Research
- Status tracking

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

- Accela Citizen Access Configuration Specifications Document (MS Word)
- Configuration of Online Record types in Accela Civic Platform
- Accela Citizen Access Admin Training

### Accela Responsibilities:

- Setup Accela Citizen Access in Dev and Test environments.
- Assist agency in set up and validation of merchant account integration.
- Work with the Agency to determine which services to expose to the public via Accela Citizen Access.
- Create configuration specification for Accela Citizen Access based on analysis with the Agency.
- Configure the Online Record types defined in the System Configuration Document in Accela Citizen Access.

### Agency Responsibilities:

- Obtain a merchant account, and deploy an internet-enabled payment engine.
- Validate that the configuration specification for Accela Citizen Access meets Agency requirements based on details from the Configuration phase of the project.
- Perform testing of all Online Record types for purposes of validating the configuration.

### Acceptance Criteria:

- Accela Citizen Access Configuration Analysis Document provides details of all configuration elements based on Accela Civic Platform back office configuration.
- The base configuration of Accela Citizen Access is configured as documented in the approved Accela Citizen Access Configuration Specification Document.
- Demonstration of the operational Accela Citizen Access functionality per the specification document(s).

### Acceptance Review Period:

- Ten (10) business days

## **DELIVERABLE 26: ACCELA MOBILE OFFICE CONFIGURATION**

Accela will configure the Accela Mobile Office application. As part of this deliverable Accela will perform the configuration tasks required to ensure Accela Mobile Office interfaces with Accela Civic Platform in both a test and production environment. Using Accela Mobile Office, an Agency inspector can perform activities such as:

- Result inspections/investigations in either store/forward or wireless mode
- Print reports in the field

## Statement of Work

Analysis activities with the Agency will result in a Mobile Office Configuration Specifications Document. Subsequently, Accela's staff will extend base configuration of Accela Mobile Office per the Mobile Office Configuration Specifications Document.

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

- Accela Mobile Office Configuration Specifications Document
- Demonstration of operation system per Accela Mobile Office Configuration Specifications Document
- Accela Mobile Office Admin Training

### Accela Responsibilities:

- Create configuration specifications for Accela Mobile Office based on analysis with the Agency.
- Configure Accela Mobile Office based on approved specifications document.

### Acceptance Criteria:

- The base configuration of Accela Mobile Office in the Development or Test environment is configured as documented in the Accela Mobile Office Configuration Specifications document.

### Acceptance Review Period:

- Ten (10) business days total

## **DELIVERABLE 27: ACCELA ELECTRONIC DOCUMENT REVIEW CONFIGURATION**

This deliverable is comprised of the activities that will enable the submission, review and markup of documents to work effectively given the Agency's configuration. Accela will leverage stamps provided out-of-the box, or from its stock of stamps, and provide instruction on the creation of stamps to the Agency. The Agency will be responsible for creating any additional stamps that will be applied through configuration. Accela will also leverage buttons provided out of the box and provide training and instruction on the creation of custom buttons with links. The Agency will be responsible for creating any buttons that will be applied through configuration. Accela will work with the Agency to identify and review:

- Documents that will be submitted online through Accela Citizen Access and Accela Civic Platform as part of the review process.
- Agency workflows associated with the document review process.
- Requirements for workflow tasks | statuses | assignments for each role (e.g. intake personnel, plan reviewers, plan processors approvers, etc.) in support of Agency workflow.
- Versioning of documents submitted / reviewed.
- Process steps within the Agency's workflow associated with reviewing the plan.
- Requirements for notifications via email.
- Stamps to be used on submitted documents.
- Buttons to be used to quickly access Web-based regulatory codes.
- Information that will be exposed to the public via Accela Citizen Access.

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

- Accela Electronic Document Review Specification Document(MS Word)
- Configuration of Accela Electronic Document Review

## Statement of Work

### Accela Responsibilities:

- Install Accela Electronic Document Review on up to 10 client PC's and train the Agency so they can install on additional PC's.
- Provide one custom stamp for each of these categories; static text, simple dynamic stamp and dynamic stamp with input for the purposes of training.
- Provide one sample custom button for the purposes of training

### Agency Responsibilities:

- The Agency will have installed .Net Framework 4.0 Client Profile and Adobe Acrobat Pro software. Adobe Acrobat Pro must be purchased and installed separately for each Agency user who will be interacting with Accela Electronic Document Review for plan review and markups.
- Make available the appropriate subject matter experts to provide needed information, participate in the analysis and verify the accuracy of the information provided.
- Creation of additional Adobe activities (stamps and buttons)
- Provide timely and appropriate responses to Accela's request for information.

### Acceptance Criteria:

- Accela Electronic Document Review Specification Document provides details of all configuration elements based on Accela Civic Platform back office configuration.
- Demonstration of the operational Accela Electronic Document Review functionality per the specification document(s).

### Acceptance Review Period:

- Ten (10) business days

## STAGE 5 – READINESS

### DELIVERABLE 28: ACCELA CIVIC PLATFORM SETUP - PRODUCTION

Accela's technical staff will work with the Agency IT staff to ensure that the components for hardware, software, database, network, and Internet are in place for the production environment. Accela technical staff will validate the proper installation and configuration of the Accela Civic Platform environment. This Deliverable is defined as the installation of the Accela Civic Platform software on Agency computer systems, such that Agency can log into the system and verify that the software was installed. During the installation of Accela Civic Platform, existing documentation on the installation of Accela Civic Platform will be updated to include the Production information and provided to the Agency as reference material.

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

- Installation of the licensed Accela Civic Platform products on Agency Production servers
- Demonstration of an operational Production Accela Civic Platform environment
- Updated Installation documentation

Specifically, Accela will perform the following tasks within the support environment:

- Perform a remote system check of the installation.
- Install Accela software.

## Statement of Work

- Demonstrate that the Accela Civic Platform applications are operational in the Agency computing environment.
- Provide documentation of the Agency installation.
- Configure Accela Civic Platform to use the reporting technology selected by the Agency (Crystal Reports).

### Accela Responsibilities:

- Consult with Agency resources to provide technical input and answer technical questions related to the installation requirements for Accela Civic Platform.
- Deliver and install the Accela Civic Platform software on the Agency server.
- Provide hardware and installation documentation to Agency in order to facilitate procurement.

### Agency Responsibilities:

- Provide timely and appropriate responses to Accela's requests for information.
- Procure and configure necessary hardware, non-Accela systems software, and networking infrastructure as specified by Accela.
- Provide/purchase/acquire the appropriate hardware, software and infrastructure assets to support the reporting technology.
- Prepare the hardware, software, and network in accordance with the specifications provided by Accela.
- Make available the appropriate Agency key IT users to participate in any hardware, software, environment, and infrastructure meetings.
- Arrange for the availability of appropriate people for the system installation, setup, testing, and quality assurance throughout the setup process.

### Acceptance Criteria:

- Confirmation of ability to log into the Accela Civic Platform software that has been installed on Agency computer systems.
- Demonstrate core Accela Civic Platform system is operational in the Agency environment.

## TRAINING STRATEGY

The objective behind developing the Training Strategy document is to create for Pinellas County a clear understanding and agreement about the scope and basic direction of the learning approach. The strategy document answers all training related questions like participants, training scope, schedule, delivery methods, etc.

- Accela shall provide comprehensive training to ensure that the County's staff can effectively use and maintain the system during configuration and after go-live.
- Such training shall include technical, functional, and end-user education on all aspects of the new Accela Civic Platform application.
- This would also include providing technical training to County staff on the configuration and installation of the system.
- Training plans for technical staff can include a combination of training by the vendor and third parties including industry standard certifications.
- Accela shall provide end user training which must be "role-based" and process-driven, tailored to accommodate the County's (job specific) use of the application, rather than generic module product training.
- The County expects a hybrid approach that combines a "train-the-trainer" approach along with onsite user training classes led by Accela's staff.

## Statement of Work

Training topics, class makeup, size, timetables, and training tools should be part of the formal Training Plan deliverables.

### **DELIVERABLE 29: ADMINISTRATIVE AND TECHNICAL TRAINING**

Accela will provide training for Agency staff that focuses on the administration, maintenance, and augmentation of its Accela Civic Platform configuration. Our aim at Accela is to educate Agency resources on all aspects of Accela Civic Platform in an effort to ensure the Agency is self-sufficient. This allows the Agency to best react to changing requirements and ongoing maintenance, which can allow the Agency to be reactive and significantly reduce system maintenance costs over time.

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

- 1 Core Team (Overview) Training – 2.5 days (20 hrs.)
- 1 Accela Civic Platform Administrator Training – 3 days (24 hrs.)
- 1 Admin Self-Hosted Training – 1 day (8 hrs.)
- 1 EMSE (scripting) Basic Training – 1 day (8hrs.)
- 1 EMSE (scripting) Advanced Training – 2 days (16 hrs.)
- 1 Report/Database Schema Training – 1 day (8hrs.)
- 1 ACA Admin Training – 1 day (8hrs.)
- 1 V360 Admin (Console) Training – 2 days (16 hrs.)

#### Accela Responsibilities:

- Coordinate with the Agency to define training schedule and logistics.
- Deliver training per the specific requirements
- Deliver any and all documentation pertaining to the training courses noted above.

#### Agency Responsibilities:

- Select and prepare the power-users who will be participating in the training and subsequently participating in training end users.
- Participate in the development of training schedules and identification of appropriate users.
- Provide suitable Agency 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 use of standard Internet browsers as a prerequisite for the course.

#### Acceptance Criteria:

- Execution of training courses

Upon mutual agreement, the final Training Plan will be modified to reflect the County specific roles and responsibilities.

### **DELIVERABLE 30: TRAIN THE TRAINER**

This Deliverable includes the Delivery by Accela of a 5-day "Train-the-Trainer" course. Accela best practices have proven that class sizes no larger than 7 participants are more successful with students who meet the pre-requisites of the course. The Accela Trainer will work with the Agency if a class size needs to be modified to ensure a successful instruction outcome.

## Statement of Work

End User Training should be coupled with the Agency delivering supplementary user training to its staff using the core Use Cases documented in each To-Be Analysis Document. Accela recommends the Agency adopt the “80/20 rule” for training, focusing the majority of their training on 80% of what the Agency normally does operationally. The recommended supplementary training conducted by the Agency can utilize business experts from each area to train on all aspects of their configuration. Accela will deliver current and comprehensive training documentation in a format that can be customized by the Agency.

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

- Accela on-site instructor-led 5 day Train-the-Trainer course sessions delivered per the agreed-to schedule.

### Accela Responsibilities:

- Coordinate with the Agency to define training schedule and logistics.
- Provide 5 day Train-the-Trainer course sessions.
- Perform post-training evaluation(s) to ensure Agency staff has the necessary information to perform their train-the-trainer duties.

### Agency Responsibilities:

- Identify the Agency resources who will receive the training and who have the skills to perform as “trainers”, if required.
- Provide a training room at the Agency facilities to conduct the 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 use of standard Internet browsers as a prerequisite for the course.

### Acceptance Criteria:

- Execution of 5 day Train-the-Trainer course sessions and verification that individuals have the information required to perform their train-the-trainer duties.

## DELIVERABLE 31: ADDITIONAL TRAINING SUPPORT

In addition to the courses listed in [Deliverable 29: Administrative and Technical Training](#), and the [Train-the-Trainer course listed in Deliverable 30](#), Accela understands the need for the Agency to have additional flexible support to address the training needs. To this end, Accela will provide a total of 80 hours / 10 days of additional training support. The effort identified in this deliverable can be utilized by the Agency in a flexible manner. Accela resources can provide augmented Admin training, or could participate and co-train any and all departments or groups identified by the Agency.

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

- 80 hours / 10 days (hours/days) of additional training support provided by Accela delivered as augmented Admin Training or participating in the delivery of training to Agency departments.

### Accela Responsibilities:

- Coordinate with the Agency to define training schedule and logistics.
- In conjunction with the Agency, identify how best utilize the training support.
- Provide all training sessions identified as part of this deliverable.

## Statement of Work

### Agency Responsibilities:

- Coordinate with the Accela to define training schedule and logistics.
- In conjunction with the Accela, identify how best utilize the training support.
- Provide a training room at the Agency facilities to conduct the 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 use of standard Internet browsers as a prerequisite for the course.

### Acceptance Criteria:

- Execution of 80 hours / 10 days (hours/days) of additional training support.

## DELIVERABLE 32: USER ACCEPTANCE TESTING (UAT)

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

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

Accela will provide assistance to the Agency as needed by providing User Acceptance Testing (UAT) support and facilitating completion of UAT. Accela will address and rectify issues discovered during the UAT process as Agency staff executes testing activities. Accela will work with the Agency to develop a test plan and deliver sample test scripts, as well as an issue log to track the progress of testing. It should be noted that Accela will plan for a total of 8 weeks to complete this deliverable.

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

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

- Resolution of issues resulting from Agency User Acceptance Testing
- Fully tested system that is ready to move to production for go-live

### Accela Responsibilities:

- Provide recommendations on testing strategy and best practices.
- Lead the Agency in up to 8 weeks of User Acceptance testing effort and the validation of the system configuration and its readiness to be migrated to production for active use.
- Resolution of issues as a result of User Acceptance Testing activities.

## Statement of Work

- A mutual agreed upon formal User Acceptance Testing Plan will be developed and executed

### Agency Responsibilities are defined by roles:

- A mutual agreed upon formal User Acceptance Testing Plan will be developed and executed
- Sponsors/Business Owners
  - Identify and create test cases/scripts
  - Identify and create test scenarios
  - Identify and list data to be used for the test scenarios
  - Assist the Test Coordinator with assessing all reported issues and indicate if the failure is due to data, system configuration, business process, or user error
  - Determine priority/business impact for each issue
- Testers/SME's/End-Users (Extended Team Members)
  - Execute test scripts and/or scenarios as defined on each Test Script Form
  - Note results of each test on the Test Script Form
  - Indicate if the test passed or failed
  - Capture all the required information related to an issue
  - Submit completed Test Script Form to the Test Coordinator
- Test Coordinator
  - Administer test schedule according to Test Plan
  - Schedule and track end-user participation
  - Explain the test participation responsibilities to testers as needed to maintain consistency
  - Maintain sign-in/sign-out sheet for testers
  - Provide/assign test scripts to testers
  - Manage end-to-end staging of test scripts to ensure testing activities are executed in the right order (where necessary) to exercise dependencies within the business processes and/or system functionality
  - Assist testers as needed
    - Manage login setup/access for testers
    - Resolve any log on issues
  - Manage any technical issues with computers in testing room
  - Obtain assistance from other project resources as needed
  - Review/record test results on the UAT Tracking Spreadsheet
  - Record all reported issues and indicate if the failure is due to data, system configuration, business process, or user error (based on the collaborative assessment with the Sponsors/Functional Leads)
  - Transfer issues into the SharePoint Testing Issues Log
  - Ensure sufficient information is recorded for each issue
  - Record the priority/business impact for each issue (as determined by the Sponsors/Functional Leads)
  - Communicate/escalate major issues
  - Produce a daily test status report
  - Work with Accela on scheduling fixes
  - Reschedule failed test scenarios/cases

### Acceptance Criteria:

- Completion of up to 8 weeks of UAT



## STAGE 6 - DEPLOY

### DELIVERABLE 33: PRODUCTION SUPPORT

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 by change order agreed to by both parties. In the weeks prior to moving to Production, Accela will assist in final data conversions, system validation, staff preparation assistance and training, and coordination of deployment.

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

- Deployment support prior to moving to Production
- Setup of Integration points in Production
- Final Conversion run during cutover
- Accela Civic Platform used in Production environment for Agency daily use

#### Accela Responsibilities:

- Provide on-site resources to support the move to Production effort.
- With assistance from the Agency, lead the effort to transfer the system configuration and any required data from Support to Production.
- Assist in the development of a Pre-Production 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 Production Planning, execution, and monitoring.
- Provide timely and appropriate responses to Accela's request for information.
- Assist in the development of a Pre-Production checklist that details the critical tasks that must be accomplished prior to moving to Production.
- Make available the appropriate Agency key users and content experts to participate in user acceptance testing as defined and managed by Agency.

#### Acceptance Criteria:

- Deployment support prior to moving to Production.
- Production system is first used by the Agency for daily use.

### DELIVERABLE 34: POST DEPLOYMENT SUPPORT AND TRANSITION TO CRC

This deliverable is comprised of the post- Production support assistance that Accela will provide to address issues and provide consultative advice immediately following the move to Production for daily use. Accela will provide support for 4 weeks 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, as well as any other issues that the Agency wishes to track (not Accela Responsibility).

## Statement of Work

Examples of issues the Agency is responsible for include training issues, functional changes beyond the scope of this Statement of Work, cosmetic changes, and procedures related to the use of Accela Civic Platform. Specifically, Accela will not be developing or creating additional reports, conversions, interfaces, records types and workflow processes that were not included in the scope of this project.

At the end of the support period, Accela will provide a final a final copy of the issue tracker to the customer and disable the list. Additionally a formal meeting will be scheduled with the Agency, Accela Services Team, and Accela CRC for the purpose of transitioning support of future issues and question from the Agency to Accela CRC.

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

- 4 weeks of Post Deployment Support, Accela will resolve *all* Post Deployment issues before transitioning to their CRC support group.
- Finalized post production issues list
- Transition of Agency from Services team to Customer Resource Center for ongoing support

### Accela Responsibilities:

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

### Agency Responsibilities:

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

### Acceptance Criteria:

- Execution of 4 weeks post-Production support.
- Official transfer from the Accela Services project team to the Customer Resource Center (CRC).

Statement of Work

**PAYMENT TERMS**

**PAYMENT SCHEDULE**

Accela will perform the Services on a GSA Not to Exceed payment basis. The project is expected to take 8,929 hours and Accela's total price to perform the Services and provide the Deliverables described in this document is estimated to be \$1,767,942.00 exclusive of taxes and expenses. The 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. Accela shall not exceed the total estimate amount without the prior approval of Agency and shall not continue to provide services, after the total estimate has been reached, without the prior authorization of Agency. Invoices will be sent after completion and approval of each deliverable described in the deliverable schedule below.

Any hours remaining on the project when Accela has completed the scope of this project will not be used for other work without a Change Order delineating the scope. Any hours remaining will expire on the SOW End Date.

**DELIVERABLE SCHEDULE**

Estimated effort and costs are specified in the Delivery Summary below:

GSA Not to Exceed Payment Schedule			
Deliverable Summary	Hrs. Est.	Estimated Cost	Est. Travel
Deliverable 1: Project Initiation	256	\$50,688.00	\$4,587
Deliverable 2: Accela Civic Platform Setup (Self Hosted)	180	\$35,640.00	\$3,225
Deliverable 3 A & 4 A: To-Be Analysis Sessions & Document - Building	240	\$47,520.00	\$4,301
Deliverable 3 B & 4 B: To-Be Analysis Sessions & Document - Development Review Services	240	\$47,520.00	\$4,301
Deliverable 3 C & 4 C: To-Be Analysis Sessions & Document - Planning	240	\$47,520.00	\$4,301
Deliverable 3 D & 4 D: To-Be Analysis Sessions & Document - Code Enforcement	240	\$47,520.00	\$4,301
Deliverable 3 E & 4 E: To-Be Analysis Sessions & Document - Utilities	240	\$47,520.00	\$4,301
Deliverable 3 F & 4 F: To-Be Analysis Sessions & Document - Public Works	240	\$47,520.00	\$4,301
Deliverable 3 G & 4 G: To-Be Analysis Sessions & Document - Solid Waste	240	\$47,520.00	\$4,301
Deliverable 3 H & 4 H: To-Be Analysis Sessions & Document - Air Quality	240	\$47,520.00	\$4,301
Deliverable 5 A: Accela Civic Platform Solution Foundation – Building	200	\$39,600.00	\$3,584
Deliverable 5 B: Accela Civic Platform Solution Foundation – Development Review Services	200	\$39,600.00	\$3,584
Deliverable 5 C: Accela Civic Platform Solution Foundation – Planning	200	\$39,600.00	\$3,584
Deliverable 5 D: Accela Civic Platform Solution Foundation – Code Enforcement	200	\$39,600.00	\$3,584
Deliverable 5 E: Accela Civic Platform Solution Foundation – Utilities	200	\$39,600.00	\$3,584
Deliverable 5 F: Accela Civic Platform Solution Foundation – Public Works	200	\$39,600.00	\$3,584
Deliverable 5 G: Accela Civic Platform Solution Foundation – Solid Waste	200	\$39,600.00	\$3,584



## Statement of Work

Deliverable 5 H: Accela Civic Platform Solution Foundation – Air Quality	200	\$39,600.00	\$3,584
Deliverable 6: Permits Plus Data Conversion Development	200	\$39,600.00	\$3,584
Deliverable 7: Air Quality Conversion Development	120	\$23,760.00	\$2,150
Deliverable 8: Natural Resources Enforcement Conversion Development	120	\$23,760.00	\$2,150
Deliverable 9: Water & Navigation Conversion Development	120	\$23,760.00	\$2,150
Deliverable 10: Mangroves Conversion Development	120	\$23,760.00	\$2,150
Deliverable 11: Complaints Conversion Development	120	\$23,760.00	\$2,150
Deliverable 12: Address Parcel Owner (APO) Conversion Development	110	\$21,780.00	\$1,971
Deliverable 13: Licensed Professional Conversion Development	110	\$21,780.00	\$1,971
Deliverable 14: ApplicationXtender Conversion Development	200	\$39,600.00	\$3,584
Deliverable 15: Financials Interface	120	\$23,760.00	\$2,150
Deliverable 16: Property Appraiser Interface	120	\$23,760.00	\$2,150
Deliverable 17: Construction Licensing Board (PCCLB) Interface	120	\$23,760.00	\$2,150
Deliverable 18: PayPal PayFlow Payment Adapter Interface	120	\$23,760.00	\$2,150
Deliverable 19: See-Click-Fix Inteface Support	40	\$7,920.00	\$717
Deliverable 20: Selectron IVR Inteface Support	8	\$1,584.00	\$143
Deliverable 21 A: Approved Business Process Validation List	350	\$69,300.00	\$6,272
Deliverable 21 B: Business Process Validation and Automation	350	\$69,300.00	\$6,272
Deliverable 22: Report Specifications	322	\$63,756.00	\$5,770
Deliverable 23: Report Development	400	\$79,200.00	\$7,168
Deliverable 24: Accela GIS Configuration	156	\$30,888.00	\$2,795
Deliverable 25: Accela Citizen Access Configuration	182	\$36,036.00	\$3,261
Deliverable 26: Accela Mobile Office Configuration	128	\$25,344.00	\$2,294
Deliverable 27: Accela Electronic Document Review Configuration	120	\$23,760.00	\$2,150
Deliverable 28: Accela Civic Platform Setup - Production	60	\$11,880.00	\$1,075
Deliverable 29: Administrative and Technical Training	219	\$43,362.00	\$3,924
Deliverable 30: Train the Trainer	170	\$33,660.00	\$3,046
Deliverable 31: Additional Training Support	80	\$15,840.00	\$1,434
Deliverable 32: User Acceptance Testing (UAT)	400	\$79,200.00	\$7,168
Deliverable 33: Production Support	160	\$31,680.00	\$2,867
Deliverable 34: Post Deployment Support and Transition to CRC	128	\$25,344.00	\$2,294
<b>Total Estimated Services (Excluding Travel)</b>	<b>8,929</b>	<b>\$1,767,942.00</b>	
<b>Travel and Expenses</b>			<b>\$160,000</b>
<b>Total Services and Expenses</b>			<b>\$1,927,942.00</b>

## EXPENSES

Actual amounts of any reasonable and customary travel expenses incurred during the performance of services under this SOW will be billed to Agency, according to current GSA expense policy. Accela will bill Agency for actual

## Statement of Work

expenses incurred for travel and lodging/living, as well as other approved out-of-pocket expenses (such as mileage, parking, tolls and telecommunications charges, etc.). Accela will work with Agency to manage and control its expenses in accordance with GSA's travel policy guidelines and will not incur expenses in excess of the initial contracted budget below without Agency's prior written consent. Expense receipts will be made available as requested by Agency. The Accela PM and Agency PM will set mutually agreed upon thresholds (following GSA guidelines) for such line items as: nightly hotel rates, airfare rates, etc. If any project team members travel is required to exceed those thresholds at any time, the Accela PM and Agency PM will mutually be required to approve such travel costs prior to project team members booking that travel. Total estimated expenses are based on past Accela engagement experience, the travel expense budget estimate is \$160,000.00.

## CONTRACT SUM

*The total amount authorized under this Agreement for Services and Expenses is therefore \$1,927,942.00 excluding taxes if applicable.*

## Statement of Work

### PROJECT ASSUMPTIONS

- Agency and Accela will review their responsibilities before work begins to ensure that Services can be satisfactorily completed.
- Agency shall provide the necessary tools, accounts, and permissions that will enable Accela to access the Agency's internal network for the purpose of remote installation and testing. This access must be provided through industry standard tools such as Virtual Private Network (VPN). Failure to provide this access in a timely fashion will result in a project delay. Such a delay will result in a Change Order.
- Agency agrees during the Initiation Phase of the project to assign a single designated approver for each major 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.
- Agency will provide work space for Accela Services for work completed on Agency premises.
- Accela will implement the most current version of Accela Civic Platform at the time of the contract signing. If Agency chooses to upgrade the system, additional costs will be incurred and managed via a Change Order.
- Agency will maintain primary responsibility for the scheduling of Agency employees and facilities in support of project activities.
- Agency will ensure that Accela resources have access to a Development or Test version of the 3<sup>rd</sup> party system for interface development. All interfaces will be developed against 1 (one), agreed upon version of the 3<sup>rd</sup> party system.
- Agency will provide/purchase/acquire the appropriate hardware, software and infrastructure assets to support all required Accela software products in both support/testing and production environments as defined in the project schedule.
- For use with Accela Citizen Access, Agency will provide/purchase/acquire an online merchant account and all related hardware required by the merchant account provider for the handling of credit cards and/or checks.
- Agency is responsible for proper site preparation, hardware, software, and network configuration in accordance with Accela specifications.
- Accela will be responsible for implementing a functioning version of the application software at the Agency (assuming the Agency has installed the proper hardware, software, and networking devices).
- 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, the resources needed to complete the tasks, a current version of the project plan, and a listing of any issues that may be placing the project at risk (e.g., issues that may delay the project or jeopardize one or more of the production dates).
- Agency will provide Accela with access to test and development environments for each Agency system that requires integration with Accela Civic Platform.
- Accela personnel will attend Agency executive steering committee meetings as needed.
- Agency has committed to the involvement of key resources and subject matter experts for ongoing participation in all project activities as defined in the project plan associated with this SOW.
- The project schedule is managed using Microsoft Project. Should any tasks slip behind schedule ten (10) business days, Accela and Agency will escalate according to the Communication Plan in the Project Charter.

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**PROJECT RESOURCES AND LOCATION OF WORK**

**WORK LOCATION**

Services contracted under this SOW may be performed remotely and/or at the Agency's on-site facilities as deemed appropriate and reasonable for the successful completion of the Services detailed herein.

**AGENCY RESOURCES**

Agency must fill the appropriate roles with the appropriate personnel to work together with the Accela Engagement Team for these Services and that Agency will make available additional resources as needed for the Services 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 roles include Sponsor, Project Manager, Technology Manager, and Business Lead(s) for each Division/department being implemented, Super User trainers, and others as appropriate.

Agency Resources	Description
<p><b>Project Sponsor</b></p>	<p>Responsibilities include:</p> <ul style="list-style-type: none"> <li>• Ultimate responsibility for the success of the project,</li> <li>• Creating an environment that promotes project buy-in,</li> <li>• Driving the project through all levels of the agency,</li> <li>• High-level oversight throughout the duration of the project,</li> <li>• Serving as the primary escalation point to address project issues in a timely manner.</li> </ul>
<p><b>Project Manager</b></p>	<p>Responsibilities include:</p> <ul style="list-style-type: none"> <li>• Overall administration, coordination, communication, and decision-making associated with the implementation;</li> <li>• Planning, scheduling, coordinating and tracking the implementation with Accela and across departments within the agency;</li> <li>• Ensuring that the project team stays focused, tasks are completed on schedule, and that the project stays on track.</li> </ul>
<p><b>Division/Departmental Business Leads</b></p>	<p>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. Responsibilities include:</p> <ul style="list-style-type: none"> <li>• Attending requirements workshop sessions;</li> <li>• Willing and able to gather data and make decisions about business processes;</li> <li>• Assist in the creation of specifications for reports, interfaces &amp; conversions</li> </ul>

Statement of Work

	<ul style="list-style-type: none"> <li>• Review and test the system configuration;</li> <li>• Participating in the implementation of the Accela Civic Platform solution.</li> </ul>
<p><b>Division/Departmental Subject Matter Expert (SME)</b></p>	<p>Responsibilities include:</p> <ul style="list-style-type: none"> <li>• Being trained on the Accela Civic Platform system at a System Administration level;</li> <li>• Being fully engaged in the Business Analysis and system configuration activities;</li> <li>• Assist internal efforts towards the creation of reports, interfaces &amp; conversions;</li> <li>• Assist in the review and testing of the system configuration;</li> <li>• Actively participate in the full implementation of the Accela Civic Platform solution.</li> </ul>
<p><b>Technical Lead</b></p>	<p>Responsibilities include:</p> <ul style="list-style-type: none"> <li>• Primary responsibility for the technical environment during the software implementation;</li> <li>• Ensure that servers, databases, network, desktops, printers, are available for system implementation and meet minimum standards;</li> <li>• Work with Accela technical personnel during implementation;</li> <li>• Maintain test and production databases;</li> <li>• Perform day-to-day maintenance of the system and install maintenance releases;</li> <li>• Act as the primary technical resource for troubleshooting problems;</li> <li>• Establish and maintain backup, archival, and other customary maintenance and housekeeping activities.</li> </ul>
<p><b>Organizational Change Management Lead</b></p>	<p>Organizational Change Management (OCM) Lead will manage the people side of change – including changes to business processes, systems and technology, job roles and organization structures. A primary focus is to create and implement change management plans that maximize employee engagement.</p> <p>Responsibilities include the following:</p> <ul style="list-style-type: none"> <li>• Applies a structured change management approach and methodology for the people side of change caused by projects and change efforts.</li> <li>• Develops a change management strategy based on a situational awareness of the details of the change and the groups being impacted by the change.</li> <li>• Identifies potential people-side risks and anticipated points of resistance, and develops specific plans to mitigate or address the concerns.</li> <li>• Conducts readiness assessments, evaluates results, and presents findings in a logical and easy-to-understand manner.</li> </ul>



## Statement of Work

	<ul style="list-style-type: none"> <li>• Develops a set of actionable and targeted change management plans – including communication plan specific to change, coaching plan, training plan, and resistance management plan.</li> <li>• Supports the execution of plans by employee-facing managers and business leaders.</li> <li>• Be an active and visible coach to coordination committee leaders, and stakeholder leads who are change sponsors.</li> <li>• Creates and manages measurement systems to track adoption, utilization, and proficiency of individual changes.</li> <li>• Identifies resistance and performance gaps, and works to develop and implement corrective actions.</li> <li>• Creates and enables reinforcement mechanisms and celebrations of success.</li> <li>• Works with project teams to integrate change management activities into the overall project plan.</li> <li>• Works with Project Management, Communication, Training Lead, Principal Enterprise Architect, Sponsors Team, and HR in the formulation of particular plans and activities to support project implementation.</li> <li>• Plans and conducts Coordination Committee, Project Teams, and Stakeholder Team Building.</li> <li>• Provides periodic updates to Project Teams and Stakeholders.</li> <li>• Plans and executes Coordination Committee, Project Teams, and Stakeholder Leads Project Kickoff.</li> </ul>
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### ACCELA RESOURCES

Accela will assign key Professional Services resources for this engagement with Agency. These individuals are well versed in the Accela Civic Platform application, and are well qualified to lead this effort. Accela's Project Manager shall assume full responsibility for the coordination of this team and its interaction with key Agency resources assigned to the effort. The main roles are as follows:

Accela Resources	Description
<b>Project Executive</b>	The Project Executive oversees the project's progress/direction and works with the Project Manager to ensure efficiency, consistency and quality in delivery of Accela implementations. The Project Executive actively participates in a project director/executive role. The Project Executive will meet with Agency Executives monthly or upon request throughout the duration of the project.
<b>Project Manager</b>	The Accela Project Manager is responsible for the overall project management and works directly with the client throughout all aspects of Accela implementations: from the initial scoping, planning, staffing to delivery. The Project Manager undertakes the project administration tasks including: <ul style="list-style-type: none"> <li>• Project plan management,</li> <li>• Change order management,</li> </ul>

Statement of Work

	<ul style="list-style-type: none"> <li>• Issue log management and escalation,</li> <li>• Status reporting,</li> <li>• Project workspace management,</li> <li>• Resources management,</li> <li>• Work plan management,</li> <li>• Meetings management,</li> <li>• Project review with Project Executive.</li> </ul> <p>In addition, the Project Manager will actively participate in leading the System Configuration Analysis sessions and will be responsible for the creation of the System Configuration Document.</p>
<p><b>Senior Implementation Consultant</b></p>	<p>The Senior Implementation Consultant assigned to the project will have major experience in the business process as well as the product functionality and is responsible for:</p> <ul style="list-style-type: none"> <li>• Business analysis activities: Mapping the client’s business processes and requirements to the functionality of Accela’s products and the creation of solution design,</li> <li>• Leading system configuration activities,</li> <li>• Providing training/mentoring to agency staff,</li> <li>• Recommend industry best practices to agency to enhance business processes,</li> <li>• Guide agency on how best to configure the system based on past experiences and software expertise.</li> </ul>
<p><b>Implementation Consultant</b></p>	<p>Implementation Consultant resources support the project and typically focus on the following tasks.</p> <ul style="list-style-type: none"> <li>• The configuration of the system to match the System Configuration document.</li> <li>• Build activities within the project, such as conversion data mapping, creation of reports and interface specification.</li> </ul>
<p><b>Technical Consultant</b></p>	<p>Accela Technical Consultants are involved in all areas that require knowledge of server-side considerations and Accela add-on products such as:</p> <ul style="list-style-type: none"> <li>• Application installation and setup (Accela Civic Platform, Accela GIS, Accela Wireless, and Accela Citizen Access),</li> <li>• Report definition and creation,</li> <li>• Event Manager Script definition and programming,</li> <li>• Database Conversions and data mapping assistance,</li> <li>• Interface specifications and development.</li> </ul>
<p><b>Training Consultant</b></p>	<p>Training Consultants are responsible for Accela Training classes with assistance from Implementation consultants, depending on the nature of the specific project.</p>

Statement of Work  
**CONSULTANT RESOURCES**

Accela may utilize Accela Partner resources in the roles and categories listed above. These Accela Partner resources are well versed in the Accela Civic Platform application and are well qualified to lead this effort. Accela's Project Manager shall assume full responsibility for the coordination of this team and its interaction with key Agency resources assigned to the effort. For this project, Accela has selected to partner with RedMark Technologies, LLC. RedMark is an Accela Certified Services Partner since 2006. They have worked closely with Accela to offer agencies the knowledge, resources and skills for the successful implementation of Accela solutions. RedMark specializes in providing analysis, configuration and implementation, among other services, and have assisted multiple agencies in the successful delivery of Accela Civic Platform. The table below shows some of the projects RedMark has delivered.

AGENCY	YEAR
Lee County, FL	In process
Suffolk County, NY	2015
City of High Point, NC	2015
City of Concord, NC	2015
Tompkins County, NY	2014
City of St. Joseph, MO	2014
City of Tampa, FL	2014
County of San Diego, CA	2013
Reedy Creek, FL	2013
City of Indianapolis, IN	2012
Jackson County, FL	2011
Escambia County, FL	2009
Miami Dade County, FL	2008
Brevard County, FL	2007

A sample of specific tasks RedMark has performed or delivered for the projects listed above are:

- Project Management
- Conduct analysis sessions and develop analysis documents
- Fully configure Accela Civic Platform
- Document report specifications and develop reports
- Write, test and deploy scripts
- Analyze and perform data conversions
- Analyze and develop interfaces to:
  - Payment gateways
  - Document Management Systems
  - Finance systems
  - Asset Management systems
  - ERP systems
  - Other 3<sup>rd</sup> party systems
- Deploy and support all aspects of Accela add-ons:
  - Accela Citizen Access (ACA)
  - Accela Mobile Office (AMO)
  - Accela GIS (AGIS)
- Training on various Accela courses
- Conduct all aspects of User Acceptance Testing (UAT)

## Statement of Work

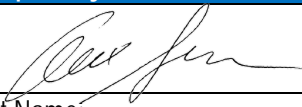
- Support Go Live and Post Go-Live efforts

RedMark is a Florida based company headquartered in Boca Raton, FL. With 10 years of experience in the deployment and implementation of Accela Civic Platform solutions, RedMark has participated in over 50 contracts for Accela Civic Platform implementations and staff augmentation at over 40 individual State, County and City agencies


## Statement of Work

### ACCEPTANCE

The Services contracted for in this Statement of Work will be considered Accepted when all Deliverables defined in the Work Description Section have been accepted by Agency as defined for each Deliverable. Additionally, transition to Accela's Customer Service Center, CRC has been completed. The live system has been handed over to the CRC and the transfer of knowledge from the Project Team to the CRC has also been completed. All training has concluded and project documentation has been handed over to the CRC.

Accepted By: Pinellas County, Florida	Accepted By: Carahsoft Technology
By:	By: 
Print Name:	Print Name: Alex Stanton
Title:	Title: Senior Account Manager
Date:	Date: 3/29/2017

APPROVED AS TO FORM

By:   
Office of the County Attorney

## Statement of Work

### APPENDIX A – ACCELA IMPLEMENTATION METHODOLOGY

Accela will deliver its Services to the Agency by employing the methodology detailed in this section. This is a proven methodology that guides the project from inception to deployment, thereby increasing the chances of successfully implementing Accela software products. Project delivery through execution of this Implementation Life Cycle is described below.

#### IMPLEMENTATION LIFE CYCLE

Thorough execution of these six stages ensures that Accela customers receive high-quality services throughout the project engagement.

Figure 1 - Accela Methodology



As illustrated in the figure above, the stages of project delivery flow in linear direction, although many tasks run in parallel as appropriate to avoid unnecessary project delays. Each stage has pre-defined objectives, tasks and associated deliverables. Depending on the exact scope of the project, a full complement or subset of all available deliverables will be delivered through the services defined for the project. Employing this deliverables-based approach ensures that Accela and the Agency understand the composition and 'downstream' impact of each project deliverable to ensure the project is delivered with quality and in a timely manner.

#### INITIATION

**Initiation** represents the first stage in the lifecycle. During the Initiation stage, project contracts and the SOW are finalized, project scope and objectives are reviewed, and project planning activities and deliverables are completed. In terms of specific deliverables, common output from the Initiation Phase is as follows:

- Project Charter,
- Baseline Project Plan,
- Project Status Report Template,
- Project SharePoint Site pre-loaded with baseline documentation,
- Project Initiation Meeting.

#### TO-BE ANALYSIS

**To-Be Analysis** is the second stage in the lifecycle. During the Analysis stage, Accela reviews existing agency documentation, interviews agency staff, and conducts workshops to understand the "To-Be" vision of the Agency that can be executed with the aid of Accela Civic Platform. It is during this Phase that Accela gains a deeper

## Statement of Work

understanding of Agency processes and business rules; simultaneously, the Agency begins to gain a deeper understanding of the methodology and Accela Civic Platform capabilities. A key output of this Phase is the To-Be Analysis Document(s) which serve as the 'foundation' for configuration of Accela Civic Platform to support germane elements of the Agency "To-Be" vision. Supplementing the To-Be Analysis Document(s) are all other configuration specifications documents related to data conversion, interfaces, reports, and event scripts.

## SOLUTION FOUNDATION

**Solution Foundation** is the third stage in the lifecycle. It begins upon completion of Stage 2 and should be completed prior to the next stage, Build. During the Solution Foundation stage, Accela Civic Platform will be built to match the to-be processes agreed to in the Analysis stage. Essential to this effort is the configuration of the Record (Case, Application, Permit, Work Order, etc) types that were agreed to during the Analysis phase. Configuration of in-scope record types is comprised of, but not limited to:

- User-defined fields (Application-Specific Information and Task-Specific Information),
- Workflows and statuses,
- Fee structures and rules,
- Inspection data.

## BUILD

**Build** serves as the fourth stage in the lifecycle, and execution of this stage overlaps Configuration, but ends after Configuration is complete. During the Build stage, all defined elements during the Analysis stage beyond the Solution Foundation will be implemented. This includes conversions, event scripts, interfaces and reports. In terms of specific deliverables, common output from the Build Phase is as follows:

- Event Script Development,
- Report Specifications and Development,
- Data Conversion Specifications and Development,
- Interface Specifications and Development.

## READINESS

**Readiness** is the fifth stage in the lifecycle. During the Readiness stage Accela Civic Platform is fully tested, errors are identified, documented and corrected. Additionally, the solution is prepared for deployment. In addition, system administrators and end users are trained so that all appropriate agency staff members are prepared to use and maintain the software once the move to production occurs. In terms of specific deliverables, common output from the Readiness Phase is as follows:

- User Acceptance Testing,
- End-User Training.

## DEPLOY

**Deploy** is the sixth and final stage in the lifecycle. During the Deploy stage the applications are moved to production; all requisite pre-production activities are identified, tracked and completed, and post-production analysis and review is completed. Upon moving to production, the Accela Civic Platform applications are transitioned to the Accela Customer Resource Center ("CRC") for ongoing support. A formal transition will occur between the Services team and the CRC that instructs the agency on available communication channels (telephone, email, online tracking system)

## Statement of Work

and use of the Accela knowledge base. Lastly, all documented issues or enhancement requests will be transitioned from the Services team to the Customer Resource Center. In terms of specific deliverables, common output from the Deploy Phase is as follows:

- Pre-Production Checklist Development, Tracking and Execution,
- Move to Production,
- Post Production Analysis,
- Formal Transition to the CRC for Ongoing Support



## Statement of Work

### APPENDIX B – DATA CONVERSION ASSUMPTIONS

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

#### GENERAL INFORMATION AND REQUIREMENTS FOR HISTORICAL CONVERSIONS

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

#### DATA CONVERSION ASSUMPTIONS

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

### STANDARD DOCUMENT MIGRATION

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

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

Statement of Work

## APPENDIX C – PCI COMPLIANCE

Vendor agrees to maintain a current PCI-DSS Attestation of Compliance (AOC) which shall be available to Client upon request.



Statement of Work

## APPENDIX D – DELIVERABLES ACCEPTANCE FORM

**Please acknowledge acceptance by:**

<p><b>A</b></p> <p>Sign and fax this document to:</p> <p>Accela, Inc. YOUR NAME YOUR TITLE <b>Tel:</b> <b>Fax:</b></p>	OR	<p><b>B</b></p> <p>Email this document as an attachment to:</p> <p><b>YOUR EMAIL</b></p>
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Date:		
Agency Name:		
Approving Agency Manager:		
Accela Manager:		
Project Name / Code:		
Contract / Agreement #:		

*Agency agrees that Accela has successfully completed the following Deliverables:*

Deliverable #	Source / Reference Details	
	Service Agreement	

*Agency agrees that Accela has successfully completed the Deliverables described above in accordance with the terms of the related Contract/Agreement.*

**APPROVALS:**

\_\_\_\_\_ Agency Name

\_\_\_\_\_ Signature

\_\_\_\_\_ Title

\_\_\_\_\_ Date





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Statement of Work

APPENDIX G – CIVIC PLATFORM 8.0 RELEASE NOTES

carahsoft



Statement of Work

## APPENDIX H – PROJECT TIMELINE

The project timeline in this Appendix is a preliminary representation of the work effort to show estimated task duration. Project schedule and timeline will reflect current dates, durations and tasks when finalized during the Project Initiation phase.





Statement of Work  
APPENDIX I – CHANGE ORDER FORM TEMPLATE

