

AMENDMENT NO. 4
 To
 Contract Purchase Agreement
 Between
 Pinellas County
 And
 Carahsoft Technology Corporation

This is Amendment No. 4 to the Contract Purchase Agreement between Pinellas County (“buyer”) and Carahsoft Technology Corporation (“Seller”).

WHEREAS, Seller and Buyer have entered in to the Agreement,

And

WHEREAS, Seller and Buyer desire to amend said Agreement.

THEREFORE, Seller and Buyer hereby agree as follows:

- 1) Redmark Technologies will be the prime contractor for the Construction Licensing Board project as described in the Statement of Work dated September 30, 2019, version 1.3:

<i>Number of Hours</i>	<i>\$Per Hour Rate</i>	<i>Total</i>
2537.50	\$ 180.00	\$456,750.00

Deliverable Summary	Estimated Cost
Deliverable 1: Project Initiation	\$34,999.99
Deliverable 2: System Setup	\$5,250.01
Deliverable 3: To-Be Analysis Sessions and Configuration	\$99,750.01
Deliverable 4: Historical Data Conversion Analysis	\$21,000.01
Deliverable 5: Historical Data Conversion Development – Data	\$28,000.01
Deliverable 6: OPUS Interface	\$14,000.00
Deliverable 7: State Licensing Board Interface	\$17,500.00
Deliverable 8: Collection Agencies	\$17,500.00
Deliverable 9: Business Process Validation and Automation	\$21,000.01
Deliverable 10: Report Specifications	\$26,249.99
Deliverable 11: Report Development	\$26,249.99

Deliverable 12: Accela GIS Configuration	\$5,250.01
Deliverable 13: Accela Citizen Access Configuration	\$31,500.00
Deliverable 14: Accela Mobile Configuration	\$5,250.01
Deliverable 15: Administrative and Technical Training	\$17,150.00
Deliverable 16: Daily User Training	\$15,750.00
Deliverable 17: User Acceptance Testing (UAT)	\$24,500.00
Deliverable 18: Production Support	\$21,000.01
Deliverable 19: Post Deployment Support and Transition to CRC	\$24,850.01
Professional Services	\$ 456,750.06
Estimated Travel	Up to 12 trips included
TOTAL	\$ 456,750.06

- 2) Pinellas County agrees to the same terms and conditions as stated on the master agreement with Carahsoft Technology dated 2/21/17, version 1.7.6.

IN WITNESS THEREOF, the parties have caused this Amendment to be executed by their duly authorized representatives.

BUYER

Sign: _____

Print: _____

Title: _____

Date: _____

SELLER

Sign: Elaine Shadid

Print: Elaine Shadid

Title: Customer Operations Specialist

Date: 10/04/2019

APPROVED AS TO FORM



JACINA HASTON
OFFICE OF THE COUNTY ATTORNEY

GOVERNMENT - PRICE QUOTATION



REDMARK TECHNOLOGIES GOVERNMENT AT CARAHSOFT



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TO: Michelle Krickovic
 Senior IT Analyst
 Pinellas County Board of County Commissioners (FL)
 400 S Fort Harrison
 Suite 300
 Clearwater, FL 33756 USA

FROM: Casey Oesterle
 Carahsoft Technology Corp.
 11493 Sunset Hills Road
 Reston, Virginia 20190

EMAIL: mkrickovic@pinellascounty.org

EMAIL: Casey.Oesterle@carahsoft.com

PHONE: (727) 453-3489

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FAX: (703) 871-8505

TERMS: GSA Schedule No: GS-35F-0119Y
 Term: December 20, 2011 - December 19, 2021
 FTIN: 52-2189693
 Shipping Point: FOB Destination
 Credit Cards: VISA/MasterCard/AMEX
 Remit To: Same as Above
 Payment Terms: Net 30 (On Approved Credit)
 Cage Code: 1P3C5
 DUNS No: 088365767
 Business Size: Other than Small
 Sales Tax May Apply

QUOTE NO: 15705779
QUOTE DATE: 09/26/2019
QUOTE EXPIRES: 10/30/2019
RFQ NO:
SHIPPING: ESD
TOTAL PRICE: \$456,750.06

TOTAL QUOTE: \$456,750.06

LINE NO.	PART NO.	DESCRIPTION	-	QUOTE PRICE		QTY	EXTENDED PRICE
REDMARK PROFESSIONAL SERVICES							
1	CON-PM	Project Manager (Per Hour) Deliverable 1: Project Initiation Carahsoft Technology Corporation - CON-PM		\$180.00	GSA	194	\$34,999.99
2	CON-PM	Project Manager (Per Hour) Deliverable 2: System Setup Carahsoft Technology Corporation - CON-PM		\$180.00	GSA	29	\$5,250.01
3	CON-PM	Project Manager (Per Hour) Deliverable 3: To-Be Analysis Sessions and Configuration Carahsoft Technology Corporation - CON-PM		\$180.00	GSA	554	\$99,750.01
4	CON-PM	Project Manager (Per Hour) Deliverable 4: Historical Data Conversion Analysis Carahsoft Technology Corporation - CON-PM		\$180.00	GSA	117	\$21,000.01
5	CON-PM	Project Manager (Per Hour) Deliverable 5: Historical Data Conversion Development – Data Carahsoft Technology Corporation - CON-PM		\$180.00	GSA	156	\$28,000.01
6	CON-PM	Project Manager (Per Hour) Deliverable 6: OPUS Interface Carahsoft Technology Corporation - CON-PM		\$180.00	GSA	78	\$14,000.00
7	CON-PM	Project Manager (Per Hour) Deliverable 7: State Licensing Board Interface Carahsoft Technology Corporation - CON-PM		\$180.00	GSA	97	\$17,500.00
8	CON-PM	Project Manager (Per Hour) Deliverable 8: Collection Agencies Carahsoft Technology Corporation - CON-PM		\$180.00	GSA	97	\$17,500.00
9	CON-PM	Project Manager (Per Hour) Deliverable 9: Business Process Validation and Automation Carahsoft Technology Corporation - CON-PM		\$180.00	GSA	117	\$21,000.01
10	CON-PM	Project Manager (Per Hour) Deliverable 10: Report Specifications Carahsoft Technology Corporation - CON-PM		\$180.00	GSA	146	\$26,249.99
11	CON-PM	Project Manager (Per Hour) Deliverable 11: Report Development Carahsoft Technology Corporation - CON-PM		\$180.00	GSA	146	\$26,249.99

QUOTE DATE: 09/26/2019
QUOTE NO: 15705779



GOVERNMENT - PRICE QUOTATION

REDMARK TECHNOLOGIES GOVERNMENT AT CARAHSOFT



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LINE NO.	PART NO.	DESCRIPTION	-	QUOTE PRICE		QTY	EXTENDED PRICE
12	CON-PM	Project Manager (Per Hour) Deliverable 12: Accela GIS Configuration Carahsoft Technology Corporation - CON-PM		\$180.00	GSA	29	\$5,250.01
13	CON-PM	Project Manager (Per Hour) Deliverable 13: Accela Citizen Access Configuration Carahsoft Technology Corporation - CON-PM		\$180.00	GSA	175	\$31,500.00
14	CON-PM	Project Manager (Per Hour) Deliverable 14: Accela Mobile Configuration Carahsoft Technology Corporation - CON-PM		\$180.00	GSA	29	\$5,250.01
15	CON-PM	Project Manager (Per Hour) Deliverable 15: Administrative and Technical Training Carahsoft Technology Corporation - CON-PM		\$180.00	GSA	95	\$17,150.00
16	CON-PM	Project Manager (Per Hour) Deliverable 16: Daily User Training Carahsoft Technology Corporation - CON-PM		\$180.00	GSA	88	\$15,750.00
17	CON-PM	Project Manager (Per Hour) Deliverable 17: User Acceptance Testing (UAT) Carahsoft Technology Corporation - CON-PM		\$180.00	GSA	136	\$24,500.00
18	CON-PM	Project Manager (Per Hour) Deliverable 18: Production Support Carahsoft Technology Corporation - CON-PM		\$180.00	GSA	117	\$21,000.01
19	CON-PM	Project Manager (Per Hour) Deliverable 19: Post Deployment Support and Transition to CRC Carahsoft Technology Corporation - CON-PM		\$180.00	GSA	138	\$24,850.01
REDMARK PROFESSIONAL SERVICES SUBTOTAL:							\$456,750.06
20	T&E	Estimated Travel Expenses Up to 12 Trips Included Carahsoft Technology Corporation - T&E		\$0.00	OM	1	\$0.00
SUBTOTAL:							\$0.00
SUBTOTAL:							\$456,750.06
TOTAL PRICE:							\$456,750.06
TOTAL QUOTE:							\$456,750.06

Statement of Work

Pinellas County Construction Licensing Board September 30, 2019

Version 1.3

Carahsoft Technology Corporation
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Reston, VA 20190
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DOCUMENT CONTROL

Date	Author	Version	Change Reference
03/18/2019	W. Chavez	1.0	Initial draft.
04/30/2019	R. Gutierrez	1.1	Minor corrections, edits and grammar.
08/23/2019	M. Krickovic	1.2	OTI review, date changes
09/25/2019	W. Chavez	1.3	Final changes after conference with M. Krickovic

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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 Contractor Licensing Department (“Agency”). Carahsoft Technology Corp. and RedMark Technologies, LLC. (“RedMark”), an Accela Certified Services Implementation Partner, 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 RedMark Services will implement the software you have purchased, including the major milestones and deliverables that will ensure your success.

RedMark is committed to providing a superior software solution, and deployment of the software, for the current and future needs of the Agency. Carahsoft Technology Corp. and RedMark will work with Agency staff to optimize Accela’s portfolio of software, best practices, and customer experience to enable the Agency to successfully deploy the Accela Civic Platform software and meet its functionality, timing and cost requirements. This Statement of Work (“SOW”) dated September 30, 2019 sets forth a scope and definition of the consulting/professional services, work and/or project (collectively, the “Services”) to be provided by RedMark 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 the Accela Civic Platform with the Accela Citizen Access, Accela GIS, and Accela Mobile Applications for the Agency. RedMark will provide professional services for implementation of the above modules and products per the Work Description section detailed henceforth. The following Agency department comprise the organization scope of the implementation described herein:

- Construction Licensing Board
 - Applications
 - Licenses
 - Complaints
 - Cases

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

- Up to 5 workflows
- Up to 10 record types

The workflows and record types may be allocated and used by the above referenced departments in a manner defined by the County.

PROJECT TIMELINE

The term of this project is 12 months and 1 number of phases.

Any delays (e.g., 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 Carahsoft Technology Corp. and RedMark 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 RedMark 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 RedMark Project Manager will work closely with Agency to update, monitor, agree, and communicate any modifications.

PROJECT MANAGEMENT

RedMark will provide a 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, RedMark will provide Project Management services throughout the project. Generally, these services include the following:

- Project plan management using Microsoft Project,
- Project document management using hosted Microsoft SharePoint project site, Dropbox, or similar solution,
- Issue log management and escalation,
- Status reporting,
- Change order management,
- Project workspace management,
- Resource management,
- Executive project oversight and quality assurance.

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

CRITICAL SUCCESS FACTORS

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

- **Knowledge Transfer** – While RedMark cannot guarantee specific expertise for Agency staff as a result of participating in the project, RedMark 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 RedMark 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** – RedMark 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. RedMark will communicate insufficient participation of Agency and RedMark resources through Project Status Reports with real and

potential impacts to the project timeline. RedMark will work with the project sponsors and department leaders to determine appropriate team member involvement. This could range from full-time during early analysis meetings to part-time during the technical 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, RedMark will provide the Agency with a Deliverable Acceptance Form to formalize acceptance and completion. The Deliverable Acceptance Form is subsequently signed by the appropriate Agency contact, as defined in the Project Charter, and faxed/scanned/mailed or hand delivered to RedMark. Please refer to Appendix C to view a sample Deliverable Acceptance Form. RedMark 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) 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.

CHANGE ORDERS

In order to make a change to the scope of Professional Services in this SOW, Agency must submit a written request to RedMark specifying the proposed changes in detail. RedMark 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”). RedMark 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 RedMark’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 RedMark and Agency prior to commencing any activities defined in the change order.

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 RedMark in order to put the project on hold. A project can be on hold for up to 90 days without invoking the termination clause (see Services Agreement). After that time, RedMark 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, RedMark will need to draft a Change Order to keep some of the RedMark 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 RedMark will need a forty-five (45) calendar day notice to re-staff the project. Resumption of the project will be dependent upon RedMark resourcing timelines.

Should the Agency become non-responsive to RedMark communications for a term of 30 calendar days regarding continuance of the project work, RedMark 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, RedMark 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 RedMark 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 RedMark after the signing of the Statement of Work.

In conjunction with the Agency representatives, RedMark 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 RedMark.
- 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, Dropbox or similar) 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
- Project Kickoff Presentation

Deliverable 1 will be completed within sixty (60) days of the execution of this SOW.

RedMark 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 RedMark to deliver Services.

- Complete Baseline Project Plan, Project Status Report Template, and Project Kickoff Presentation deliverables with input from appropriate Agency resources.

Agency Responsibilities:

- Identify and set expectations with key resources and subject matter experts for ongoing participation in the project.
- Provide timely and appropriate responses to RedMark'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 SYSTEM SETUP

This Deliverable is defined as the setup of the Accela Civic Platform software in the Accela Cloud environment such that County can log into the system and verify software is available.

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

- Setup of the Accela Civic Platform software, development (DEV) environment, in the Accela Cloud
- Demonstration of the operational Accela Civic Platform environment

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

- Perform a remote system check of the system
- Demonstrate that the Accela Civic Platform applications are operational
- Ensure all tasks are completed on Accela's side for VPN tunnel with County for any necessary integration.

RedMark Responsibilities:

- Provide timely and appropriate responses to County request for information
- Consult with Agency resources to provide technical input and answer technical questions related to the requirements for Accela Civic Platform.

County Responsibilities:

- Provide timely and appropriate responses to RedMark's request for information
- Make available the appropriate County users to validate system is setup and available.
- Complete tasks related to setup of VPN tunnel to Accela environment.

Acceptance Criteria:

- Confirmation of ability to log into the Accela Civic Platform software.

STAGES 2 & 3 – ANALYSIS AND CONFIGURATION

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 is the system tested and accepted system configuration. RedMark will provide

professional services to develop the Accela Civic Platform Solution Foundation in accordance with requirements established and agreed upon during the analysis sessions. RedMark will produce a detailed system generated configuration report that represents the entire foundation of the system, for each relevant module. This document will be delivered for review with the completed solution.

The sessions will 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 sessions do not include detailed information related to the following deliverables as they are dependent on the completion of the Solution Foundation milestone.

- [Deliverable 9: Business Process Validation and Automation](#)

DELIVERABLE 3: TO-BE ANALYSIS SESSIONS AND CONFIGURATION

RedMark will work closely with designated Agency personnel and will conduct analysis sessions to capture the “to-be” required business processes. RedMark will then configure the system and confirm such configuration with Agency personnel.

In conjunction with the Agency representatives, RedMark 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.

As agreed during the onsite meeting that took place on Wednesday February 27, 2019, the configuration will be initially delivered by RedMark based on the experience and design utilized by several agencies throughout the State of Florida where RedMark has delivered Accela solutions for Licensing Departments. Michelle Krickovic will act as the Subject Matter Expert (SME), and Agency Project Manager, and will in turn include anyone else from the team that she feels is necessary to complete the configuration before running the entire demo for the Director. If necessary, RedMark will provide 30 hours of configuration changes to the packaged configuration to meet Agency requirements.

Deviations from the initial packaged configuration and additional configuration hours will be considered as a Change Order.

RedMark'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.
- Configuration of the system per Agency personnel specifications.
- System generated Configuration report.

RedMark 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 RedMark'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 and Configuration.

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 RedMark 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 RedMark 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 RedMark may recommend understanding 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).

RedMark 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 conducted by RedMark personnel with assistance from the Agency. Once the data mapping has been defined, RedMark will ask that a representative of the Agency sign off on the data maps. RedMark 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.**

DELIVERABLE 4: HISTORICAL DATA CONVERSION ANALYSIS

Upon receipt of Agency's Oracle data, RedMark will create a Data Conversion Mapping Document 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 this deliverable:

- Historical Data Conversion Mapping Document

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

Acceptance Criteria:

- The Historical Data Conversion Specifications document identifies historical 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:

- Ten (10) days total

DELIVERABLE 5: HISTORICAL DATA CONVERSION DEVELOPMENT - DATA

Upon Agency approval of the Historical Data Conversion Specifications document, RedMark will provide a program(s) to migrate appropriate Oracle historical data into Accela Civic Platform.

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

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

RedMark Responsibilities:

- Provide a program to migrate historical data into the Development environment.
- Each data conversion will include up to three (3) conversion loads for client testing
- Validate the successful completion of the migration of historical data into the Agency's Development 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:

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

Acceptance Review Period:

- Ten (10) days total

DELIVERABLE 6: OPUS INTERFACE

Accela will provide an interface between Accela Civic Platform and the Agency's **OPUS** system. 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 3rd 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 environment

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 OPUS System Data Source software to ensure data from Accela is in correct format.
- Updates to interface, post go-live, due to changes in 3rd 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 7: STATE LICENSING BOARD INTERFACE (COUNTY MAINTAINED)

Accela will provide an interface between Accela Civic Platform and the **State Licensing Board** database currently maintained by the Agency. This interface will import data processed in the State Licensing Board database 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 3rd 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 environment

Accela Responsibilities:

- Provide timely and appropriate responses to Agency's request for information.
- Conduct Interface Analysis sessions for an interface with State Licensing Board database.
- 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 State Licensing Board Data Source software to ensure data is in correct format.
- Updates to interface, post go-live, due to changes in 3rd 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 8: COLLECTION AGENCIES

Accela will provide an interface between Accela Civic Platform and the **Collection Agencies**. This interface will export Accela data that needs to be forwarded to Collection Companies by the Agency. 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 3rd Party data **from** 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 environment

Accela Responsibilities:

- Provide timely and appropriate responses to Agency's request for information.
- Conduct Interface Analysis sessions for the interface to create the export file.
- 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 interface that interacts 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 export file to ensure data from Accela is in correct format.
- Updates to interface, post go-live, due to changes in 3rd 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

PAYMENT PROCESSOR INTERFACE - BACK OFFICE AND ACA

The payment processor interface to be developed for the main Accela project will be used by Contractor Licensing Board.

DELIVERABLE 9: BUSINESS PROCESS VALIDATION AND AUTOMATION

During the configuration analysis phase of the implementation project, RedMark will identify opportunities to supplement the Accela Civic Platform base functionality via Event Manager Script Engine (EMSE) script development. RedMark will work with key Agency project stakeholders to identify the business rules/processes to be automated. RedMark 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 RedMark, and which scripts can be developed by the Agency. The scripts developed by RedMark can be used as models whereby agency staff can develop and modify additional EMSE scripts as needed.

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.

- Closing workflows based on investigation results
 - Use Case: Fine paid, update workflow;
- Automatic assessment of complex fee calculations
 - Use Case: Insurance expirations auto fee calculation;
- Increment a date based on workflow status change
 - Use Case: Tracking investigations from receipt of complaint to assignment to investigator, to site visit to issue of citations, to collection of fine payments, to case status change;
- Manage exceptions based on various criteria
 - Use Case: Depending on workflow / insurance status, do not allow a renewal 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 RedMark. The approved document will be used as a basis for determining completion and approval of the deliverable. An estimate of one hundred and twenty (120) hours has been allocated for Business Process Validation and Automation. If the Level of Effort to develop the initially identified scripts exceeds the 120 hours, the Agency can add additional hours through a Change Order.

RedMark will provide the Agency with a detailed monthly report summarizing scripting hours used and balance of hours available to ensure reasonable resource planning. RedMark will ensure that the Project Plan includes a minimum sixty (60) days to develop, write and test scripts.

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 environments per the specifications document(s)

RedMark 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 RedMark.
- 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 RedMark will develop.
- Provide timely and appropriate responses to RedMark'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.

Acceptance Criteria:

- Review and acceptance of design document with written sign-off from the Agency.
- Demonstrate a developed script within the system.

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 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.

DELIVERABLE 10: REPORT SPECIFICATIONS

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

- 10 reports of High Complexity
- 4 reports of Medium 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 RedMark. 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 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 RedMark

RedMark Responsibilities:

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

Agency Responsibilities:

- Provide timely and appropriate responses to RedMark'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 RedMark that will be needed for agreement on the Deliverable.

Acceptance Criteria:

- Agreement on prioritized list of reports that will be developed by RedMark.
- Review and approval of individual Report Specifications documents. The Agency will not withhold acceptance if the Agency requests changes to the report specifications after the initial signoff of the specification by the Agency.
- Agency will have ten (10) days to review the Report Specification Documents. If no changes or comments are requested within the ten (10) day allotted, the Report Specification Documents are considered approved by the Agency.

DELIVERABLE 11: REPORT DEVELOPMENT

RedMark will develop custom documents/letters/reports per the specifications developed and approved in [Deliverable 8. 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 RedMark 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 14 documents/letters/custom reports per the Report Specification Documents

RedMark Responsibilities:

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

Agency Responsibilities:

- Provide timely and appropriate responses to RedMark'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 environment per Report Specifications.

DELIVERABLE 12: ACCELA GIS CONFIGURATION

RedMark 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).

During GIS installation, RedMark'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. RedMark 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)
- Accela GIS Admin Training

RedMark Responsibilities:

- Install Accela software and perform quality assurance checks on the configuration and performance based on acceptance criteria mutually developed by RedMark 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
- Does not include external APO (XAPO).

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 RedMark 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 Development environment.

DELIVERABLE 13: ACCELA CITIZEN ACCESS CONFIGURATION

This deliverable includes setup and configuration of Accela Citizen Access (ACA) on the Agency Dev site. RedMark 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:

- Record Research – Contractor Status search and disciplinary/complaint history
- Permit Status
- License Renewals
- Case Status Tracking
- Make a report of suspected unlicensed construction activity and view Case Status tracking
- Make a report against an unlicensed Contractor and view Case Status tracking
- Upload/update insurance information and certificates
- License application and Case Status tracking
- Contractor Change of Status
- Apply for Reciprocity
- Request a duplicate license card
- Pay renewals, citations, administrative fines, insurance penalties, and fees associated with other services noted above

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

- Accela Citizen Access Configuration Specifications Document (MS Word)
- Configure ACA for [List Languages] language versions
- Configuration of Online Record types in Accela Civic Platform
- Accela Citizen Access Admin Training

RedMark Responsibilities:

- Setup Accela Citizen Access in Dev environment.
- 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) days

DELIVERABLE 14: ACCELA MOBILE CONFIGURATION

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

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

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

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

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

RedMark Responsibilities:

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

Acceptance Criteria:

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

Acceptance Review Period:

- Ten (10) days total

STAGE 5 – READINESS

DELIVERABLE 15: ADMINISTRATIVE AND TECHNICAL TRAINING

RedMark will provide training for Agency staff that focuses on the administration, maintenance, and augmentation of its Accela Civic Platform configuration. Our aim at RedMark 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 Training – 1 days
- 1 Administrator Training – 3 days

RedMark Responsibilities:

- Coordinate with the Agency to define training schedule and logistics.
- Deliver training per the specific requirements listed above.

Agency Responsibilities:

- Select and prepare the power-users who will be participating in the training and subsequently training end users.

- Arrange the time and qualified people for the training who are critical to the project success.
- 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 listed training courses

DELIVERABLE 16: DAILY USER TRAINING

This Deliverable includes the delivery by RedMark to Agency of 1 instances of the Daily User Training course (2 days onsite). Accela best practices have proven that class sizes no larger than 14 participants are more successful with students who meet the pre-requisites of the course. The RedMark Trainer has the right to modify the class size to ensure successful instruction with Agency agreement.

End User Training should be coupled with the Agency delivering supplementary user training to its staff using the core Use Cases documented in each System Configuration Document. RedMark recommends that Agency adopt the "80/20 rule" for training, focusing the majority of their training on the 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.

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

- 1 instances of Daily User Training

RedMark Responsibilities:

- Coordinate with the Agency to define training schedule and logistics.
- Provide 1 of Daily User Training.

Agency Responsibilities:

- Select and prepare the power-users who will be participating in the training and subsequently training end users.
- Arrange the time and qualified people for the training who are critical to the project success.
- 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 1 instances of the End User Training course to the Agency.

DELIVERABLE 17: USER ACCEPTANCE TESTING (UAT)

This deliverable is comprised of the assistance RedMark will provide to allow the Agency to accept that the solution meets the requirements as documented in all the deliverables. RedMark 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.

RedMark will provide of support for training, oversight, answering questions and addressing issues discovered in User Acceptance Testing. It should be noted that it is critical that the Agency devote ample time and resources to his effort

to ensure that the system is operating per signed specifications and ready for the move to production. The testing effort will require a significant time investment by the Agency, and coordination of resources is critical. At this point in the implementation process, the Agency should test individual components of functionality of the solution (i.e., functional and/or unit testing), and also test to ensure that the interrelated parts of the Accela Civic Platform solution are operating properly (i.e., integration testing).

RedMark will provide assistance to the Agency as needed by providing User Acceptance Testing (UAT) support and facilitating completion of UAT. RedMark will address and rectify issues discovered during the UAT process as Agency staff executes testing activities. RedMark 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 RedMark will plan for a total of 3 weeks to complete this deliverable.

If the Agency does not devote adequate time and staffing to UAT in order to completely test the solution, RedMark may opt to postpone go-live at the Agency's expense. RedMark 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

RedMark Responsibilities:

- Provide recommendations on testing strategy and best practices.
- Lead the Agency in up to 3 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.

Agency Responsibilities:

- Provide timely and appropriate responses to RedMark'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.
- Develop the User Acceptance test scripts.
- Utilize the use cases documented in each Configuration Document Deliverable as the basis for the acceptance of this Deliverable.

Acceptance Criteria:

- Completion of up to 3 weeks of UAT

STAGE 6 – DEPLOY

DELIVERABLE 18: PRODUCTION SUPPORT

Production date is defined as the official date in which Accela Civic Platform moves from the development environment to production for daily Agency usage. This date will be agreed to by both RedMark 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, RedMark 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

RedMark 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 RedMark'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 19: POST DEPLOYMENT SUPPORT AND TRANSITION TO CRC

This deliverable is comprised of the post- Production support assistance that RedMark will provide to address issues and provide consultative advice immediately following the move to Production for daily use. RedMark will provide support for 2 weeks immediately following deployment (go-live).

RedMark 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 RedMark, as well as any other issues that the Agency wishes to track (not RedMark Responsibility). 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, RedMark 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, RedMark will provide a final copy of the issue tracker to the customer and disable the list. Additionally, a formal meeting will be scheduled with the Agency, RedMark Services Team, and Accela CRC for the purpose of transitioning support of future issues and questions from the Agency to Accela CRC.

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

- 2 weeks of Post Deployment Support
- Finalized post production issues list
- Transition of Agency from Services team to Customer Resource Center for ongoing support

RedMark Responsibilities:

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

Agency Responsibilities:

- Provide technical and functional user support for post-production support and monitoring.
- Develop and maintain a Post Production Issues List.
- Provide timely and appropriate responses to RedMark'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 2 weeks post-Production support.
- Official transfer from the RedMark Services project team to the Customer Resource Center (CRC).

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PAYMENT SCHEDULE

RedMark will perform the Services on a GSA Not to Exceed payment basis. RedMark's total price to perform the Services and provide the Deliverables described in this document is estimated to be \$456,750.06 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. RedMark 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 amounts remaining on the project when RedMark has completed the scope of this project will not be used for other work without a Change Order delineating the scope.

<i>Number of Hours</i>	<i>\$Per Hour Rate</i>	<i>Total</i>
2537.50	\$ 180.00	\$456,750.00

Deliverable Summary	Estimated Cost
Deliverable 1: Project Initiation	\$34,999.99
Deliverable 2: System Setup	\$5,250.01
Deliverable 3: To-Be Analysis Sessions and Configuration	\$99,750.01
Deliverable 4: Historical Data Conversion Analysis	\$21,000.01
Deliverable 5: Historical Data Conversion Development – Data	\$28,000.01
Deliverable 6: OPUS Interface	\$14,000.00
Deliverable 7: State Licensing Board Interface	\$17,500.00
Deliverable 8: Collection Agencies	\$17,500.00
Deliverable 9: Business Process Validation and Automation	\$21,000.01
Deliverable 10: Report Specifications	\$26,249.99
Deliverable 11: Report Development	\$26,249.99
Deliverable 12: Accela GIS Configuration	\$5,250.01
Deliverable 13: Accela Citizen Access Configuration	\$31,500.00
Deliverable 14: Accela Mobile Configuration	\$5,250.01
Deliverable 15: Administrative and Technical Training	\$17,150.00
Deliverable 16: Daily User Training	\$15,750.00
Deliverable 17: User Acceptance Testing (UAT)	\$24,500.00
Deliverable 18: Production Support	\$21,000.01
Deliverable 19: Post Deployment Support and Transition to CRC	\$24,850.01
Professional Services	\$ 456,750.06
Estimated Travel	Up to 12 trips included
TOTAL	\$ 456,750.06

EXPENSES

Actual amounts of any reasonable and customary travel expenses incurred during the performance of services under this SOW that are above and beyond the 16 trips included in the above pricing will be billed to Agency. The Agency shall reimburse the Contractor the sum of not-to-exceed the approved amount for the travel expenses incurred if agency approves trips in excess of the 16 trips included in this SOW, in accordance with Section 112.061, Florida Statutes, and County Travel Policy, and as approved in writing in advance by the agency authorized individual.

CONTRACT SUM

The total amount authorized under this Agreement for Services and Expenses is therefore \$456,750.06 excluding taxes if applicable.

TERMS

The pricing and terms of this proposal are valid until **January 31, 2020**. If this Statement of Work is accepted after this date all pricing and terms may not be valid.

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PROJECT ASSUMPTIONS

- Agency and RedMark 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 RedMark 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 RedMark a minimum of one month before a deliverable is due.
- Agency will provide work space for RedMark Services for work completed on Agency premises.
- RedMark will implement the most current version of Accela Civic Platform at the time of the contract signing. In the case of self-hosted customers, if Agency chooses to upgrade the system at any time after initial system installation has been completed, 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 RedMark resources have access to a Development or Test version of the 3rd party system for interface development. All interfaces will be developed against 1 (one), agreed upon version of the 3rd 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.
- RedMark 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).
- RedMark 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 RedMark with access to test and development environments for each Agency system that requires integration with Accela Civic Platform.
- RedMark 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, RedMark and Agency will escalate according to the Communication Plan in the Project Charter.

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

	<ul style="list-style-type: none"> • Being fully engaged in the Business Analysis and system configuration activities; • Assist internal efforts towards the creation of reports, interfaces & conversions; • Assist in the review and testing of the system configuration; • Actively participate in the full implementation of the Accela Civic Platform solution.
Technical Lead	<p>Responsibilities include:</p> <ul style="list-style-type: none"> • Primary responsibility for the technical environment during the software implementation; • Ensure that servers, databases, network, desktops, printers, are available for system implementation and meet minimum standards; • Work with RedMark technical personnel during implementation; • Maintain test and production databases; • Perform day-to-day maintenance of the system and install maintenance releases; • Act as the primary technical resource for troubleshooting problems; • Establish and maintain backup, archival, and other customary maintenance and housekeeping activities.

REDMARK RESOURCES

RedMark 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. RedMark'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:

RedMark Resources	Description
Project Executive	<p>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.</p>
Project Manager	<p>The RedMark 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:</p> <ul style="list-style-type: none"> • Project plan management, • Change order management, • Issue log management and escalation, • Status reporting, • Project workspace management, • Resources management, • Work plan management, • Meetings management,

	<ul style="list-style-type: none"> Project review with Project Executive. <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>
Senior Implementation Consultant	<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"> Business analysis activities: Mapping the client’s business processes and requirements to the functionality of Accela’s products and the creation of solution design, Leading system configuration activities, Providing training/mentoring to agency staff, Recommend industry best practices to agency to enhance business processes, Guide agency on how best to configure the system based on past experiences and software expertise.
Implementation Consultant	<p>Implementation Consultant resources support the project and typically focus on the following tasks.</p> <ul style="list-style-type: none"> The configuration of the system to match the System Configuration document. Build activities within the project, such as conversion data mapping, creation of reports and interface specification.
Technical Consultant	<p>RedMark Technical Consultants are involved in all areas that require knowledge o server-side considerations and Accela add-on products such as:</p> <ul style="list-style-type: none"> Application installation and setup (Accela Civic Platform, Accela GIS, Accela Mobile, and Accela Citizen Access), Report definition and creation, Event Manager Script definition and programming, Database Conversions and data mapping assistance, Interface specifications and development.
Training Consultant	<p>Training Consultants are responsible for Accela Training classes with assistance from Implementation consultants, depending on the nature of the specific project.</p>

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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, FL	Accepted By: Carahsoft Technology Corporation
By:	By: <i>Elaine Shadid</i>
Print Name:	Print Name: Elaine Shadid
Title:	Title: Customer Operations Specialist
Date:	Date: 10/04/2019

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APPROVED AS TO FORM



JACINA HASTON
OFFICE OF THE COUNTY ATTORNEY

APPENDIX A - ACCELA IMPLEMENTATION METHODOLOGY

RedMark 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 RedMark 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, RedMark 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 RedMark gains a deeper 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) 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

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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 RedMark 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.
- RedMark 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 RedMark 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, RedMark 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, RedMark will provide recommendations for transposing the data in the proper format.
- **Documents:** Historical/Legacy data conversion does not include the conversion of attached documents. If conversion of documents is required, this will be priced as a separate effort. If requested, 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 separate and standalone conversion efforts for each source of documents, and are therefore counted individually, even if the documents are part of a system that is already accounted for as 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 3rd party EDMS is used by Accela Civic Platform, it is still possible to convert documents if the 3rd 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.

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APPENDIX C – DELIVERABLES ACCEPTANCE FORM

Please acknowledge acceptance by:

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

Agency agrees that RedMark has successfully completed the following Deliverables:

Deliverable #	Source / Reference Details	
	Service Agreement	

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

APPROVALS:

Agency Name

Signature

Title

Date