



Statement of Work

Monterey Peninsula Water Management District Accela Civic Platform Implementation

October 2, 2017

Version 1.2

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DOCUMENT CONTROL

Date	Author	Version	Change Reference
3/11/2016	Ean Darbo	1.0	Initial Draft
8/8/2017	Eric Strang	1.1	Updated scope
10/2/2017	E Strang	1.2	Update sow language and scope based on feedback from MPWMD: <ul style="list-style-type: none">- Updated data conversion for Accela to perform data conversion processing with Agency's doing data cleansing- Updated Training- Updated pricing



INTRODUCTION

This Statement of Work (“SOW”) dated March 11, 2016 sets forth a scope and definition of the professional services (collectively, the “Services”) to be provided by Accela (“Accela”) to Monterey Peninsula Water Management District (“Agency”).

Capitalized terms not defined in this SOW are as defined in the Services Agreement. In the event of a conflict between the Agreement and this SOW, the terms of the Services Agreement shall govern. Scope not specifically defined within this document is excluded.

CRITICAL SUCCESS FACTORS

In order to successfully execute the Services described herein, there are several critical success factors that must be closely monitored and managed by Accela and Agency stakeholders:

- **Dedicated Agency Participation** – Agency acknowledges that its staff has the appropriate skills and subject matter expertise and that they are actively involved throughout the entire duration of Services as defined in the Project Plan. Accela will communicate insufficient participation of Agency resources through project status reports, and by other means, with real and potential impacts to the project. Accela will work with the project sponsors to determine appropriate team member involvement. This could range for example from full-time, during early analysis meetings, to part-time during the technical implementation stage.
- **Clear Business Objectives** – Agency has clearly documented their business objectives before the commencement of the project, and shared those objectives with Accela
- **Requirements Identified and Documented** – Agency and Accela identify, document, prioritize, and continually manage the Agency’s technical, functional, data, and any other requirements that must be satisfied in order for the project to be considered successful by the Agency and Accela
- **Business Process Definition and Understanding** – Agency must be able to articulate their current business processes and be willing to share that information with Accela, in particular during the To-Be Analysis stage of the project. If there is an expectation that the Agency’s business processes might be modified during the project, the Agency and Accela must discuss this topic to determine what, if any, risks such an endeavor might introduce to the project.
- **Accela Implementation Methodology** – This implementation has been scoped and planned around the Accela Implementation Methodology. It is imperative to the project’s success that the Agency is willing to adhere / adopt to the Accela Implementation Methodology throughout the project
- **Knowledge Transfer** – It is critical that Agency personnel participate in the analysis, configuration and deployment of the software being delivered in order for Accela to transfer knowledge to the Agency. Once Post Production assistance tasks are completed by Accela, the Agency assumes all day-to-day operations of Accela Civic Platform outside of the Support and Maintenance Agreement. Depending on the scope of the project, key knowledge transfer areas could include:
 - Configuration
 - Interfaces



- Business Rules
- Reports and Forms
- Release Management

ACCELA IMPLEMENTATION METHODOLOGY

Accela will deliver its Services to the Agency by employing the methodology detailed in this section. This is a proven methodology that guides the project from inception to deployment, thereby increasing the chances of successfully implementing Accela software products. Project delivery through execution of this Implementation Life Cycle is described below. It is the execution of these six stages which allows Accela to provide to its customers high-quality services throughout the project.



The stages of project delivery flow in a linear direction, although many tasks within a stage or in different stages may run in parallel as appropriate in order to avoid project delays. Each stage has pre-defined objectives, tasks and deliverables. Depending on the exact scope of the project, a full complement or a subset of all potential deliverables will be delivered through the Services defined for the project. Employing this deliverables-based approach allows Accela and the Agency to understand the composition and ‘downstream’ impact of each deliverable to complete the project with quality and in a timely manner.

INITIATION

Initiation is the first stage in the lifecycle, during which the initial Project Plan is finalized, project scope and objectives are reviewed. In addition, high-level training on the Accela software is conducted to in order to introduce the project team to the application.

TO-BE ANALYSIS

To-Be Analysis is the second stage in the lifecycle. During the Analysis stage, Accela reviews existing Agency documentation, interviews Agency staff, and conducts workshops to understand the “To-Be” vision of the Agency that can be executed with the aid of Accela Civic Platform. It is during this stage that Accela gains a deeper understanding of Agency processes and business rules; simultaneously, the Agency begins to gain a deeper understanding of the methodology and the Accela Civic Platform capabilities. A key output of this stage is the To-Be Analysis Document(s) which serve as the ‘foundation’ for configuration of Accela Civic Platform to support the Agency’s “To-Be” vision. Supplementing the To-Be Analysis Document(s) are the finalization of the inventories of all other solution components (e.g., interfaces, reports, business rules, data conversion programs), and the creation of the configuration specification documents for these objects.

SOLUTION FOUNDATION

Solution Foundation is the third stage in the lifecycle. It begins upon completion of Stage 2, and, depending on the project may overlap briefly with the next stage, Build. During this stage, the Accela Civic Platform will be built to match the to-be processes agreed to in the To-Be Analysis stage. Essential to this



effort is the configuration of the Record types (e.g., Case, Application, Permit, Work Order, etc) that were agreed to during the To-Be Analysis stage.

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 built and quality checked. This includes objects such as conversions, business rules, interfaces and reports.

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. As well, system administrators and end users are trained so that Agency staff members are prepared to use and maintain the software once it is in production.

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 relevant aspects of Accela Civic Platform applications are transitioned to the Accela Customer Support Center ("CSC") for ongoing support. A formal transition occurs between the Accela Professional Services team and the CSC. The CSC instructs the Agency on available communication channels (e.g., telephone, email, online tracking system) and usage of the Accela knowledge base. Lastly, all documented issues or enhancement requests will be transitioned from the Accela Professional Services team to the CSC.

SCOPE OF SERVICES

The purpose of this section is to products and high level activities that comprise the Accela implementation for the Agency.

ACCELA PRODUCTS

The following Accela products are in scope for this Project:

- Accela Civic Platform – Land Management
- Accela GIS
- Accela Mobile
- Accela Citizen Access

PROJECT SCOPE

The **Deliverable Summary** table below provides a list of the project deliverables. [Appendix C](#) contains a detailed description of each deliverable as well as the responsibilities of Accela and the Agency in the creation, review, and approval of the deliverables.



Deliverable Summary

Stage	Deliverable #	Deliverable Name
Initiation	1	Project Initiation
	2	Accela Civic Platform Setup
To-Be Analysis	3	To-Be Analysis Sessions
	4	To-Be Analysis Document(s)
Solution Foundation	5	Accela Civic Platform Solution Foundation
Build	6	Historical Data Conversion Analysis
	7	Historical Data Conversion Development
	8	Interface Analysis and Development
	9	Business Rules
	10	Report Specifications
	11	Report Development
	12	Accela GIS Deployment
	13	Accela Citizen Access Deployment
Readiness	14	User Experience
	15	Administrative Training
	16	Daily User Training
Deploy	17	User Acceptance Testing (UAT)
	18	Production Support
	19	Post Deployment Support and Transition to Customer support

Scope Description

The **Scope Description** table below provides detail and clarity on key areas of scope. The Scope Description defines areas of scope that can be quantified, may have ambiguity regarding definition and require change control if modified.



Scope Area	Scope Description
Accela Project Management	Half Time Accela project management oversight which includes the following activities: <ul style="list-style-type: none"> • Development and Management of a Project Plan • Project Document Management • Project Website Management (Sharepoint) • Issue Log Management and Escalation • Status Reporting • Change Control • Resource Management • Project Oversight and Quality Assurance • Development of Project Charter governance document
Accela Civic Platform – Environments and Components	3 Accela Hosted environments (Support, Test, and Production) with the following software components will be setup: <ul style="list-style-type: none"> • Accela Civic Platform Land Management Module • Accela Citizen Access • Accela GIS • Accela Mobile
Solution Foundation (i.e., Records)	Conduct analysis sessions, document to-be definition, and configure solution for a maximum of: <ul style="list-style-type: none"> • 3 high complexity records <ul style="list-style-type: none"> ○ Residential Water Permit ○ Commercial Water Permit ○ Mixed Use Water Permit • 3 medium complexity records <ul style="list-style-type: none"> ○ Water Distribution System Permit or Confirmation of Exemption ○ Water Use Permit ○ Hydrant Meter Permit • 8 low complexity records <ul style="list-style-type: none"> ○ Fire Suppression ○ Water Consumption ○ Pre-App Consultation ○ Rebate ○ Water Credit ○ Conservation ○ Complaint ○ Violation\Non-Compliance <p>Definition of complexity can be found in Appendix A. Defined in scope Record Types can be found in Appendix F.</p>



Scope Area	Scope Description
Data Conversion	Accela will provide services to perform the full data conversion for the Agency. Agency will be responsible for data cleansing. Accela will be responsible for the data mapping, performing 2 mock runs, perform 1 production run and validate the data mapping with the destination results.
Interfaces	Specify the interface names / source systems, etc. in as much detail as possible. <ul style="list-style-type: none"> • Tyler Incode • GovTeller
Business Rules	Conduct analysis sessions, document specifications and develop / unit test Business Rules for a maximum of items of the following category: <ul style="list-style-type: none"> • 10 Validation Rules • 10 Fee Automation • 10 Record Creation • 10 General Automation • 5 Expression Builder Validation • 5 Expression Builder Automation • 1 Batch Script for Permit Maintenance Definition of Business Rule categories can be found in Appendix A.
Reports	Conduct analysis sessions, document specifications and develop / unit test reports for a maximum of: <ul style="list-style-type: none"> • 3 medium complexity reports • 5 low complexity reports • 10 reports using the Accela Ad-Hoc report writer for business users Definition of complexity can be found in Appendix A.
Accela GIS	Setup and Configuration of Accela GIS to connect to existing ESRI map service.
Accela Mobile	Deployment of Accela Mobile so that Agency users can login and unit test.
User Experience	2 (two), 2 hour User Experience Workshops
Training	Accela's Training involvement encompasses: <ul style="list-style-type: none"> • Civic Platform Core Team Training – up to 2.5 days, 15 max attendees. • Civic Platform Admin Usage – up to 3.5 days, 10 max attendees. • Accela GIS – update to 4 hours, 12 max attendees. • Accela Mobile – up to 1 day, 12 max attendees. • Civic Platform Database Schema Fundamentals and Report Manager – up to 4 hours, 7 max attendees • Ad-Hoc Reporting – up to 4 hours, 7 max attendees. • Train-the-Trainer End User Training – up to 5 days, 10 max attendees
Testing Support	Support for 4 calendar weeks of System Testing Support for 4 calendar weeks of User Acceptance testing.



Scope Area	Scope Description
Deployment – Go Live Preparation	Accela will perform the following activities in the weeks leading up to go-live: <ul style="list-style-type: none"> • Develop a Go Live Plan. • Migrate final version of system from Test to Production environment. • Final Production run of Data Conversions.
Deployment – Go Live	2 staff onsite for week one of go-live (5 days).

SOW START AND END DATE

The Start and End dates below represent the known dates for execution of the scope and implementation services defined within this Statement of Work.

SOW Start Date: <enter SOW Start Date here>

SOW End Date: <enter SOW End Date here>

PROJECT TIMELINE

The term of this project is 10 months.

Accela and Agency will jointly commit to a start date when resources are confirmed. Any Agency-requested delays after the start date is confirmed may require up to a forty-five (45) business day lead time for Accela to resource the project again.

Upon initiation of these Services, the Accela Project Manager will work with the Agency Project Manager to collaboratively define a baseline project schedule. Given the fact that project schedules are working documents that change over the course of the project, the Accela Project Manager will work closely with Agency Project Manager to update, monitor, agree, and communicate any modifications within the Change Management process.

PAYMENT TERMS

PAYMENT SCHEDULE

Accela will perform the Services on a pre-defined payment basis as outlined in the schedule set forth in this SOW. Accela’s total price to perform the Services and provide the Deliverables described in Appendix C is \$555,925.00 exclusive of taxes and expenses (the “Fixed-Fee”). The Fixed-Fee price is based on the information available at the time of signing and the assumptions, dependencies and constraints, and roles and responsibilities of the Parties, as stated in this SOW. Invoices will be sent on the monthly anniversary of the contract signing.

Payment #	Name	Amount
1	10% Due On Contract Signing	\$63,326.20
2	Monthly Progress Payment 1	\$50,660.96
3	Monthly Progress Payment 2	\$50,660.96
4	Monthly Progress Payment 3	\$50,660.96
5	Monthly Progress Payment 4	\$50,660.96



6	Monthly Progress Payment 5	\$50,660.96
7	Monthly Progress Payment 6	\$50,660.96
8	Monthly Progress Payment 7	\$50,660.96
9	Monthly Progress Payment 8	\$50,660.96
10	Monthly Progress Payment 9	\$50,660.96
11	Monthly Progress Payment 10	\$50,660.96
12	10% Retention	\$63,326.20
	Total Services	\$633,262.00
	Travel Estimate	\$43,115.00
	Total Travel and Services	\$676,377.00

EXPENSES

Actual amounts of any reasonable and customary travel expenses incurred during the performance of services under this SOW will be billed to Agency, according to Accela’s expense policy. Accela will bill Agency for actual expenses incurred for travel and lodging/living, as well as other approved out-of-pocket expenses (such as mileage, parking, tolls and telecommunications charges, etc.). Accela will work with Agency to manage and control its expenses in accordance with Accela’s global travel policy guidelines and will not incur expenses in excess of the initial contracted budget below without Agency’s prior written consent. Expense receipts will be made available as requested by Agency. Total estimated expenses are based on past Accela engagement experience. Based on the assumption that there will be approximately 21 onsite trips at an estimated \$2,054 each, the travel expense budget estimate is \$43,115.00

CONTRACT SUM

The total amount payable under this Agreement for Services and Expenses is therefore \$676,377.00 excluding taxes if applicable.

PROJECTS PUT ON HOLD

It is understood that sometimes Agency priorities are revised requiring the Agency to place the Accela implementation on hold. In such a case, the Agency must send a formal written request sent to Accela in order to put the project on hold. A project can be on hold for up to 90 days without invoking the termination clause (see Services Agreement). After that time, Accela can choose to cancel the Statement of Work. If the Agency chooses to re-engage at a later date, Accela will provide a new Statement of Work with revised pricing.

When a project is put on hold, a Change Management process will be invoked to:

- Manage the ramp off of resources and safe-keeping of project artifacts
- Pro-rate and invoice for partially completed deliverables
- Transition and re-engagement of resources at the end of the hold period



When a project goes on hold, project resources will be re-deployed and Accela will need a forty-five (45) calendar day notice to re-staff the project. Resumption of the project will be dependent upon Accela resourcing timelines.

ASSUMPTIONS

This section contains several assumptions upon which Accela has relied on in agreeing to perform the Services described in this SOW. If any of these prove to be incorrect, it may cause changes to the project's schedule, fees, expenses, work product, level of effort required, or otherwise impact Accela's performance of the Services described in this SOW. If this occurs, change requests may be required between the Agency and Accela.

GENERAL

- Accela will implement the feature set available in the current Production release at the time of contract signing. New releases and patch upgrades will be deployed to the Accela Cloud Production environment throughout this implementation. Leveraging new features may affect the scope and timeline for this project and are considered out of scope.
- Agency is responsible for the installation and maintenance of all third party products.
- 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 for usage on Accela Citizen Access.
- Agency will provide Accela resources 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. In the event that local development of interfaces is required, Agency will provide a workstation with required IDEs (e.g. Visual Studio).
- Agency shall be responsible for determining whether to use or refrain from using any recommendations made by Accela.

SCOPE AND TIMELINE

- Any tasks not specifically defined in this document are not included in this agreement.
- The Project Plan will be mutually agreed to by Agency and Accela Project Managers during the Initiation stage. Any material changes to the Project Plan will be reviewed and mutually agreed to by the Agency and Accela Project Managers.
- Agency will commit the necessary resources and management involvement to support the project and to perform the agreed upon tasks in the Project Plan.
- Accela will provide the Agency with a Weekly Status Report that outlines the tasks completed during the prior week, the upcoming tasks that need to be completed during the following week, the resources needed to complete the tasks, a current version of the Project Plan, and a listing of any issues that may be placing the project at risk (e.g., issues that may delay the project or jeopardize one or more of the production dates). Accela and Agency Project Managers will agree on the format of the status report (i.e., the status report template) prior to the status report being produced.



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- The project schedule is managed using Microsoft Project. Should any tasks slip behind schedule ten (10) business days, Accela and Agency will escalate according to the Escalation Plan in the Project Charter and invoke the change management process.
 - Deliverables will be documented using the Accela methodology and associated templates. Any changes to the templates must be agreed to by the Accela Project Manager.

AGENCY RESOURCING

- Agency will provide a dedicated Project Manager throughout the course of the project.
- Agency Project Manager has primary responsibility for the scheduling of Agency employees and facilities in support of project activities.
- 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. The general roles and responsibilities of these resources is described in Appendix B.
- Agency agrees during the Initiation Stage 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. If the Agency desires that more than 1 (one) Agency resource be involved in the deliverable review and approval process, the Agency's single designated approver is responsible for coordinating with those resources.
- Agency will identify project sponsors and all necessary stakeholders prior the project kickoff, and will commit these personnel for the duration of the project. The expected time commitments from these resources will be defined in the Project Charter.
- Project timeline delays caused by Agency employees or third party team members that result in a change in the project schedule will be addressed by the Change Management process.
- Agency shall be responsible for the contractual relationship with third parties that are not contracted through Accela and will work to confirm that they cooperate with Accela.

ACCELA RESOURCING

- Accela will appoint a Project Manager throughout the project in order to plan and monitor execution of the project in accordance with deliverables outlined in the Statement of Work.
- Accela resources will be committed to the project as defined in the Project Plan and will work remotely except for the planned onsite trips. The general roles and responsibilities of these resources is described in Appendix B.
- Accela personnel will be a part of the Agency executive steering committee and will attend meetings per the schedule defined in the Project Charter.
- Accela will plan appropriate resourcing to facilitate the success of the deployment for the scope outlined in this SOW. Significant additional support requested by Agency above and beyond this level will be handled through the change management process.
- Accela has no responsibility for the performance of other contractors or vendors engaged by the Agency, or delays caused by them, in connection with the project even if Accela has been involved in recommending or selecting such other contractors or vendors, or in the monitoring of their work.

GO LIVE AND GO LIVE SUPPORT

- The definition of "Go Live" is that the Accela software is up and running in the Production environment. If an Agency moves to Production, i.e. "Goes Live" it is deemed to have accepted the product (see "Acceptance" in



Services Agreement) and shall comply with any payment obligation for “Move to Production”, “Go-Live” and / or “Acceptance”.

PROJECT COMPLETION

- The project is complete once the transition to Accela’s Customer Support organization (i.e., the CSC) has been completed.

ACCEPTANCE

- For deliverable based payments agreements, the criteria outlined in the Services Description in Appendix C for the corresponding deliverable will be deemed accepted based on the Acceptance language in the Services Agreement. Upon completion of each payment deliverable, Accela will provide the Agency with the Accela Deliverable Acceptance Form to formalize acceptance and completion of that scope item. The number of days the Agency has to accept or reject the Deliverable Acceptance is delineated in the Services Agreement. The Deliverable Acceptance Form is subsequently signed by the appropriate Agency contact, as defined in the Project Charter, and faxed / scanned / emailed / hand delivered to Accela. Please refer to Appendix D to view a sample Deliverable Acceptance Form.
- For non-deliverable based payment agreements, at minimum, it is required that the Agency provide written acceptance for a minimum of the major stages of the project, which are typically: Initiation, Analysis, Foundation, Build, Readiness, and Deployment within 5 business days of the agreed completion date of the stage.
- Agency understands and agrees that Agency is responsible for determining whether the services and work product provided by Accela hereunder, including any revised business processes implemented pursuant to this SOW, (i) meet Agency’s business requirements, (ii) comply with all applicable laws, ordinances, codes, regulations, and policies, and (iii) comply with Agency’s applicable internal guidelines, long-term goals and any related agreements.

DATA CONVERSION

The following information provides detail related to the scope of Accela’s data conversion activities. Due to the inherent complexity of data conversion, it is critical to address and understand common questions and misconceptions.

GENERAL INFORMATION AND REQUIREMENTS FOR HISTORICAL CONVERSIONS

- Data conversion includes the conversion of transactional data to the Accela Civic Platform database upon completion of the Solution Foundation Stage. 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.
- Agency will perform all data cleansing and manipulation of the data prior to a data conversion run into the Accela Civic Platform. Accela will load data into the Accela data staging tables using the Accela Data Migration utility
- Accela will build the data map for the legacy data to load into the Accela Civic Platform. Accela will perform unit testing of the conversion program including spot checks of the data within Accela Civic Platform in order to identify if data quality issues exist. Extensive quality assurance of legacy / historical data by the Agency is required in order to allow accurate transfer of data.



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- A completed, signed off, Solution Foundation is required before approving and finalizing the data conversion map.
 - A completed, signed off, data conversion map is required prior to beginning the data conversion development.

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, which means if invalid, inaccurate, or incomplete data is provided, it will be loaded into Accela Civic Platform “As-is”. All data cleanup must occur prior to execution into Accela Civic Platform by the Agency with the assistance of Accela.
- **Accela Data Conversion Tools:** Data will be mapped and converted utilizing Accela’s conversion tools and methodologies. Accela tools consist of the Accela data mapping tool and the Accela conversion tool.
- **Acceptable Data Formats For Historical Conversion:** It is expected that the Conversion Source Data be provided in an Oracle or Microsoft SQL Server database format that is currently supported by Accela Civic Platform Application product.
- **Acceptable Data Formats For Reference Conversion:** It is expected that the Conversion Source Data be provided in Oracle, Microsoft SQL Server database format that is currently supported by Accela Civic Platform Application product, or a pipe-delimited flat file format.
- **Documents:** Historical / Legacy data conversion includes the conversion of attached documents into Accela Document Services (“ADS”) in Accela Civic Platform, provided that the Agency provides the documents in the structure Accela requires. The documents will be converted to the configured primary electronic document management system (EDMS). See Standard Document Migration for additional details.

STANDARD DOCUMENT MIGRATION

- The standard document conversion is 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, the Agency must extract documents into a Windows file system prior to being evaluated for conversion.

ADMINISTRATION

CHANGE MANAGEMENT

The estimated fees for this SOW are predicated on the timely completion of project milestones. If a change is identified that impacts project timeline, resources, or scope, the Agency Project Manager and Accela Project Manager will invoke the Change Management process. The process will determine the impact to project budget and a Change Order will be created for mutual review and approval. All Change Orders shall be signed by Accela and Agency prior to commencing any activities defined in the Change Order. Change Orders are used to document items such as, but not limited to, a change in approach, adjustments for delays, removing scope, addition of scope, timeline delays, addition of resources, etc.



The Change Order Template is in Appendix E.

EXPIRATION

If the project has not begun within sixty (60) calendar days of SOW signature date, the current scope and terms may be renegotiated.

FINAL ACCEPTANCE

Final Acceptance is defined as Agency turnover to Accela Customer Support for ongoing support and maintenance. This occurs post go-live, when the duration of post go-live support as defined in deliverable has been completed.



APPENDIX A: DEFINITONS

Definitions of significant terms (including those are Capitalized in the SOW but aren't defined in the Services agreement) that are used throughout the SOW (e.g., Project Plan, Acceptance, Defect, Services, Change Order, etc.) can be found in this Appendix. Additionally, this Appendix will provide structure for terms or subjects that can be construed differently, such as what characteristics constitute a "low" complexity record type vs. a "high" complexity record type. The same applies to interfaces, reports, and other build objects.

Business Rules Definition

Type	Definition
Validation Scripts	Script that validates data and prevents submission of a form when the business rule fails.
Fee Automation	When fees need to be assessed and updated via scripting. Common for customers using legacy products where fee's are already auto-assessing based on user defined fields and other criteria.
Record Creation	Records are created via scripting, pre-populated and linked to a record hierarchy.
General Automation	General automation, such as creating and inspection, updating ASI, updating workflow, etc.
Expression Builder Validation	Script that validates data in a form and prevents submission.
Expression Builder Automation	Script that updates user defined field, required settings, hidden fields, etc, on a form.

Report Definition

Complexity	Definition
Low	Letter, Certificate of Occupancy, Notice, Mailing Label, Simple Listing / Transaction reports
Medium	Permit, Receipt, Inspection Ticket, Batch Letters, Grouped Listing / Transaction reports,
High	Activity Summary, Management Report, Statistical/Analytical Report, Financial Summary, Schedule, Agenda

Record Types – Land Management

Complexity	Definition
Low	Includes only a few components and a simple workflow, 4-5 tasks maximum. No fees or no inspections. Ex: Code Enforcement complaint, Over the Counter Building Permit, Planning Records request.
Medium	Includes most components, either no fees or no inspections. Ex: Standard Building Permit, Standard Planning Case, Code Enforcement Abatement.
High	Includes all components, ASI, Complex Workflow, Fee's and Inspections or includes more than 15 fee calculations. Ex: Combo Permits, Planning (Zoning and Discretionary), New building, etc.



APPENDIX B: PROJECT RESOURCES

AGENCY RESOURCES

The table below lists the primary roles for the Agency and the high-level responsibilities of each. Additional Agency roles may be added as the project progresses. In some cases, more than one Agency role can be filled by the same person. As well, some roles may require more than one resource at various times. The specific personnel assigned for each role and the expected time commitment for each can be found in the Project Charter.

Agency Roles	Responsibilities
Project Sponsor	<ul style="list-style-type: none"> • Ensure project aligns with Agency strategy and goals • Provide high-level oversight throughout the duration of the project • Create an environment that promotes team work and user adoption • Garner support from all Agency stakeholders • Assist in removing execution obstacles • Resolve issues and risks escalated by the Project Manager • Act as vocal and visible Project champion
Project Manager	<ul style="list-style-type: none"> • Plan, schedule, coordinate and track the implementation with Accela and across departments within the Agency • Ensure that the project team stays focused, tasks are completed on schedule • Identify and mitigate issues and risks, and escalate as needed in a timely manner • Collaborate closely with Accela Project Manager • Enforce project governance and structure in regards to change control, communication and escalation management • Establishes project priorities
Division / Departmental Subject Matter Expert (SME)	<ul style="list-style-type: none"> • Fully engaged in the business analysis and system configuration activities • Gather data as necessary for the project and make decisions about business processes • Assist in the creation of to-be analysis documents, specifications for reports, automation, interfaces & conversions • Review and test the system configuration • Participates in test planning, test script development and user acceptance testing • Attend product training



Agency Roles	Responsibilities
Technical Lead	<ul style="list-style-type: none"> • Manage and maintain the technical environment during the software implementation • Ensure that servers, databases, network, desktops, printers, are available for system implementation and meet minimum standards • Manages integration and interfaces with other systems and serves as primary point of contact for all city interfaces • Work with Accela technical personnel during implementation • 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
Report Developer	<ul style="list-style-type: none"> • Understand the reporting needs of Agency • Build or amend reports as needed • Attend product training

ACCELA RESOURCES

The table below describes the primary roles, and the high-level responsibilities of each, that Accela will fill. Additional Accela roles may be added as the project progresses. In some cases, more than one Accela role can be filled by the same person. As well, some roles may require more than one resource at various times. The specific personnel assigned for each role and the expected time commitment for each can be found in the Project Charter.

Accela Roles	Responsibilities
Project Executive	<ul style="list-style-type: none"> • Partner closely with the Agency Sponsor and participate in Steering Committee meetings • Provide high-level oversight throughout the duration of the project • Assist in removing Project execution obstacles • Resolve issues and risks escalated by the Project Manager
Project Manager	<ul style="list-style-type: none"> • Plan, schedule, coordinate and track the implementation with Agency • Ensure that the project team stays focused, tasks are completed on schedule • Identify and mitigate issues and risks, and escalate as needed in a timely manner • Collaborate closely with Agency Project Manager • Enforce project governance and structure in regards to change control, communication and escalation management • Maintain project workspace and create weekly status reports



Accela Roles	Responsibilities
<p>Solution Lead</p>	<ul style="list-style-type: none"> • Responsible for the Functional and Technical Consultants, working directly with client Subject Matter Experts (SMEs) and technical personnel throughout all aspects of the implementation • Manages and assists in Business Analysis activities • Manages and assists in Configuration activities • Manages and assists in Technical Configuration activities • Provide design oversight and direction to the team • Ensure quality of all deliverables • Ensure methodology is being adhered • Provide expertise and direction on best practices • Provide expertise and guidance on release/environment management • Assist with analysis of change requests
<p>Functional Consultant</p>	<ul style="list-style-type: none"> • Lead/participate in configuration analysis • Develop report specifications • Develop business automation/validation specifications • Aid in UAT issue resolution • Support Go-Live activities • Provide support to the Technical Consultant • Provide support to the Training Consultant • Configure the solution



Accela Roles	Responsibilities
Technical Consultant(s)	Data Conversion Consultant <ul style="list-style-type: none"> • Review data conversion approach and deliverable expectations • Develop data conversion data map • Build and Unit Test data conversion program • Execute and support data conversion for testing and go-live
	Interface Consultant <ul style="list-style-type: none"> • Conduct Interface analysis sessions • Develop data integration specifications for importing or exporting data from Accela Civic Platform • Build and Unit Test data integration programs
	Report Consultant <ul style="list-style-type: none"> • Manage and assist in the development of report specifications • Manage and assist in the development of reports • Manage and assist in Unit Testing reports • Manage report deployment
	Scripting <ul style="list-style-type: none"> • Manage and assist in the development of scripts specifications • Manage and assist in the development of scripts • Manage and assist in Unit Testing scripts • Manage script deployment
	AMO <ul style="list-style-type: none"> • Manage and assist in the development of Accela Mobile Office (AMO) specifications • Manage and assist in the development of AMO configuration • Manage and assist in Unit Testing AMO configuration • Manage AMO deployment
	GIS <ul style="list-style-type: none"> • Manage and assist in the development of GIS specifications • Manage and assist in the development of GIS configuration • Manage and assist in Unit Testing GIS configuration • Manage GIS deployment Environment Lead <ul style="list-style-type: none"> • Install and set up Accela Civic Platform
Training Consultant	<ul style="list-style-type: none"> • Deliver Accela Training classes



APPENDIX C – DELIVERABLES

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

STAGE 1 – INITIATION

DELIVERABLE 1: PROJECT INITIATION

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

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

- Finalize staffing for the project teams.
- 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.
- Provide Accela standard Project Status Report Template format.
- Finalize and document formal deliverable signoff procedures, identify team members that will be responsible for signoff from the Agency and Accela.
- Finalize an integrated baseline Project Plan that includes resource allocation for all tasks (in cooperation with the Agency Project Manager).
- Develop a Project Charter that defines how the project will be governed, including a detailed escalation plan.
- Create the project Sharepoint site and load all standard, current documentation.
- Conduct Core Team training in order to prepare the Subject Matter Experts for the To-Be Analysis stage.

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
- Core Team Training (2 days)

Accela Responsibilities:

- Provide timely and appropriate responses to Agency's request for information.
- Coordinate project planning activities.



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- Communicate the Accela Implementation Methodology that will be used by Accela to deliver Services.
 - Complete Baseline Project Plan, Project Status Report Template, and Project Kickoff Presentation deliverables with input from appropriate Agency resources.

Agency Responsibilities:

- Identify and set expectations with key resources and subject matter experts for ongoing participation in the project.
- Provide timely and appropriate responses to Accela's requests for project planning input and meeting logistics requests.
- Provide meeting facilities for Project Kickoff and other onsite activities.
- Include Project Sponsor in Project Kickoff Meeting.
- Provide suitable Agency facilities to accommodate training.
- Ensure that users are proficient in using PC's in a Windows environment as a prerequisite for the training.
- Ensure that users are familiar with use of standard Internet browsers as a prerequisite for the training.

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
- Completion of Core Team Training

DELIVERABLE 2: ACCELA CIVIC PLATFORM SETUP

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

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

- Setup of the Accela Civic Platform software, development and test environments, in the Accela Cloud
- Demonstration of an operational Accela Civic Platform environment

Specifically, Accela 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.

Accela Responsibilities:

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

Agency Responsibilities:

- Provide timely and appropriate responses to Accela's requests for information.
- Make available the appropriate Agency users to validate system is setup and available.

Acceptance Criteria:



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

STAGE 2 – TO-BE ANALYSIS

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

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

- Process Overview
- Intake Process, user defined and required fields
- Required/Optional Review Tasks
- Issuance requirements
- Inspection Types, scheduling and checklists
- Workflow and processing requirements
- Fee's – types, processing and schedules
- Citizen Portal (Accela Citizen Access) specific to online submittal, inquiry, inspection scheduling and fee payments

The To-Be Analysis Sessions and To-Be Analysis Document(s) will include the high-level requirements related to the following deliverables:

- [Deliverable 8: Business Rules](#)
- [Deliverable 10: Report Specifications](#)
- [Deliverable 11: Report Development](#)
- [Deliverable 14: User Experience](#)

However, the specifics for each deliverable will be discovered and documented later in the project as they are dependent on the completion of the Solution Foundation milestone. (**Example:** Discovery of Agency requirement for a Receipt Report is documented during Stage 2: To-Be Analysis, however, the specific report specification and requirements is completed in the Report Specification deliverable)

The Project Team, consisting of representatives from both Accela and the Agency, will conduct a formal review of the To-Be Analysis Documents for the purpose of approval and sign-off on the deliverable. Prototypes of select processes which will be used during the review sessions to demonstrate the proposed functionality. Prototyping is intended to demonstrate selected aspects of Accela Civic Platform functionality to assist in understanding how it will operate for the Agency. Prototyping is not meant to be a complete end-to-end solution.

DELIVERABLE 3: TO-BE ANALYSIS SESSIONS

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

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

- Review and understand existing business processes intended for migration into Accela Civic Platform.
- Review the developed business process as a basis for configuration in Accela Civic Platform's workflow tool.



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

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

- To-Be Analysis data gathering activities including workshops, interviews and web conferencing sessions.

Accela Responsibilities:

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

Agency Responsibilities:

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

Acceptance Criteria:

- Draft of To-Be Analysis Document for each Completion of To-Be Analysis Sessions for in scope processes.

DELIVERABLE 4: TO-BE ANALYSIS DOCUMENT(S)

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

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

- To-Be Analysis Document(s).

Accela Responsibilities:

- Provide timely and appropriate responses to Agency's request for information.



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- Interview staff as necessary in order to understand existing business processes.
 - Build selected prototypes to demonstrate proposed functionality.
 - Conduct meetings via email, web conference, phone, and in person to gather and validate analysis input.
 - Prepare and complete To-Be Analysis Document(s) capturing the Agency's business processes to be included in the Solution Foundation.

Agency Responsibilities:

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

Acceptance Criteria:

- Review To-Be Analysis Document(s) and validate that the content accurately reflects the business processes data that will be included in the Accela Civic Platform Solution Foundation.
- Agency will have 5 business days to conduct initial review of the To-Be Analysis Document(s). If no changes or comments are requested within the 5 days, the To-Be Analysis Document(s) is considered approved by the Agency. Upon delivery of initial feedback, Accela will complete the necessary changes and updates. The second and final review will have 3 business days for acceptance.

STAGE 3 – SOLUTION FOUNDATION

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

DELIVERABLE 5: ACCELA CIVIC PLATFORM SOLUTION FOUNDATION

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

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

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

Accela Responsibilities:

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

Agency Responsibilities

- Provide timely and appropriate responses to Accela's request for information.
- Make available the appropriate Agency key users and content experts to participate in solution configuration of the system in an effort to learn about the system and facilitate in knowledge transfer.



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- Work with Accela to verify that the system meets the foundational requirements documented in the To-Be Analysis Document(s).
 - The Agency will test the system for purposes of validating the configuration.

Acceptance Criteria:

- Review and approve that the Accela Civic Platform Solution Foundation meets the requirements documented in the approved To-Be Analysis Document(s).
- Agency will have 5 business days to conduct initial review of the Solution Foundation. If no changes or comments are requested within the 5 days, the milestone is considered approved by the Agency. Upon delivery of initial feedback, Accela will complete the necessary changes and updates. The second and final review will have 3 business days for acceptance.

STAGE 4 – BUILD

The Build stage includes data conversions, development of interfaces, development of all Business Process Validation and Automation (Event Manager Scripts and Expressions) configuration of add-on products and custom report development. It comprises all of the additional activities outside of solution foundation that are required to complete the total solution 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

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

Accela will oversee 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 cleansing effort.

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



DELIVERABLE 6: HISTORICAL DATA CONVERSION ANALYSIS

Upon receipt of Agency's Legacy data, Accela 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

Accela Responsibilities:

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

Agency Responsibilities:

- Provide access to historical data
- Provide subject matter experts on the data source to aid Accela 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) business days total

DELIVERABLE 7: HISTORICAL DATA CONVERSION DEVELOPMENT

Upon Agency approval of the Historical Data Conversion Specifications document, (Deliverable 6), Accela will provide a program(s) to migrate appropriate historical data into Accela Civic Platform. Upon receipt of the conversion from Accela, the Agency DBA will load the data into the Test environment for validation.

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

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

Accela Responsibilities:

- Provide a program to migrate historical data into the Agency's AA test database environment.
- Each data conversion will include up to three (3) conversion loads for client testing
- Validate the successful completion of the migration of historical data into the Agency's test environment.
- Execute the data conversion program and provide access to environments as needed



Agency Responsibilities:

- Providing the legacy data source in an accepted format
- Provide resources to validate the conversion statistics and the quality of the data converted into Accela Civic Platform

Acceptance Criteria:

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

Acceptance Review Period:

- Ten (10) business days total

SYSTEM INTERFACES

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

Accela will conduct Analysis and Development (Deliverable X and X) for each system that will be interfaced with Accela within the scope of this implementation.

Deliverable	System Name	Description
8A	Tyler Incode	End of day financial transaction to Agency finance system
8B	GovTeller	Payment Processor

DELIVERABLE 8: INTERFACE ANALYSIS AND DEVELOPMENT

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(s) 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/from Accela Civic Platform.

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

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

Accela Responsibilities:



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- Provide timely and appropriate responses to Agency's request for information.
 - Conduct Interface Analysis sessions.
 - 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 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 specification development and data mapping process.
- Review and approve the interface specification documents.
- Work with Third Party Data Sources to determine best methods of interfacing to Accela system.
- Validate interface through testing.
- Work with 3rd party 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.

Acceptance Review Period:

- Ten (10) business days total

DELIVERABLE 9: BUSINESS RULES

During the configuration Analysis stage of the implementation project, Accela will identify opportunities to supplement the Accela Civic Platform base functionality via Event Manager Script Engine (EMSE) scripts and Expression Builder in order to validate and automate business processes. Accela will work with Agency to identify desired functionality, and subsequently will assist with prioritizing the needs in order to determine that will be developed by Accela within the scope of this implementation. The Business Process Validation and Automation developed by Accela can be used as models whereby agency staff can develop and modify additional functionality as needed.

Business Rules are broken out into two areas as defined below:

- **EMSE (Event Manager Scripting Engine)** – used to script based on system activities, such as a before or after event, that allow the system to automate activities (**example:** do not allow an inspection to be scheduled prior to a specific workflow task, or, auto-calculate and invoice a fee upon application submittal)
- **Expression Builder** – used to script form based interactions that occur prior to triggering and event or master script activity (**example:** auto-population form based data fields based on user-selected values)



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

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

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

Accela Responsibilities:

- Work with Agency staff to identify potential uses of scripting
- Assist with development of list of desired functionality
- Aid the Agency in prioritizing which scripts will be developed by Accela
- Develop 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 scripting tools and approaches for ongoing maintenance
- Prioritize desired functionality to determine which scripts Accela will develop
- Provide timely and appropriate responses to Accela's request for information
- Verify the Script Specification meets the intended business requirement
- Allocate the time for qualified personnel to test the script for acceptance

Acceptance Criteria:

- Review and acceptance of design document with written sign-off from the Agency
- Demonstration of all developed script within the system to the Agency

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.

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

DELIVERABLE 10: REPORT SPECIFICATIONS

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

Accela and Agency have agreed that Accela will develop reports based on the following breakdown:

- 3 Medium Complexity
- 5 Low Complexity
- 10 Ad-Hoc Report Writer

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

A proven strategy that combines the use of the Accela Civic Platform Quick Queries, Accela Ad-Hoc reports and custom reports developed by Accela, or Agency, can ensure that all required reporting requirements are met.

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

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

Accela Responsibilities:

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

Agency Responsibilities:

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

Acceptance Criteria:

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



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- Agency will have 5 business days to review the Report Specification Documents. If no changes or comments are requested within the 5 days, the Report Specification Documents are considered approved by the Agency.

DELIVERABLE 11: REPORT DEVELOPMENT

Accela will develop custom documents/letters/reports per the specifications developed and approved in [Deliverable 10, Report Development](#). Changes to the report specifications after approval can negatively impact project progress and the overall schedule. Therefore, changes to the report specifications after approval requires an analysis by Accela to determine the level of effort required, and if a Change Order would be required to complete the work.

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

- A total of 18 documents/letters/custom reports per the Report Specification Documents

Accela Responsibilities:

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

Agency Responsibilities:

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

Acceptance Criteria:

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

DELIVERABLE 12: ACCELA GIS DEPLOYMENT

Accela will install and configure Accela GIS to link and leverage existing Agency GIS information, including assistance with establishing the map service to be used in conjunction with Accela GIS. The following are the main objectives being pursued through the implementation of the Accela GIS:

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

During GIS installation, Accela's technical staff will work with Agency IT staff to ensure that the components for hardware, software, database, network, and Internet are in place for the Accela GIS test and production environments. Accela technical staff will validate the proper installation and configuration of the Accela GIS environment.

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

- Accela GIS installed on Agency server(s)



-
- GIS Admin Training, 4 hours

Accela Responsibilities:

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

Agency Responsibilities:

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

Acceptance Criteria:

- Demonstration of operating Accela GIS in test environment

DELIVERABLE 13: ACCELA CITIZEN ACCESS DEPLOYMENT

This deliverable includes setup and configuration of Accela Citizen Access (ACA) on the Agency Dev or Test site per the Requirements gathered in the To-Be Analysis Stage. Accela will work with the Agency representatives validate and implement Accela Citizen Access to extend certain aspects of the internal Accela Civic Platform configuration for use by the general public. Specifically, the following items will be configured:

- Integration into existing Agency website
- Text Settings, including disclaimers, help text and watermarks
- Security Settings
- Form Layout
- User registration settings
- User rights and permissions
- Accela Citizen Access Admin Training

Accela Responsibilities:

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



Agency Responsibilities:

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

Acceptance Criteria:

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

Acceptance Review Period:

- Ten (10) business days

DELIVERABLE 14: USER EXPERIENCE

User Experience is comprised of the fine-tuning of the User Interface (“look and feel”) of the system, usability and security. This portion is completed prior to User Acceptance Testing to provide a more refined view of the system and assistance with system acceptance for new users. Accela will use the completed configuration and standard, best practice User Interface as a starting point for analysis and documentation of desired look and feel of Accela Civic Platform user interface.

User experience configuration will be accomplished through a series of onsite, and remote web meeting, workshops. These workshops will be used in order to accomplish the requested changes, in real-time, and provide ad-hoc training/knowledge transfer to Agency staff on the process of modifying the look and feel of the Accela Civic Platforms User Interface. Per Accela’s best practice methodology, each workshop will be 2 hours long. Information collected, and updated, during the workshop include detailed settings related to the following topics:

- Home Page, Dashboard, Spaces and Form Layout
- Navigation tools
- Search screens and data filtration tools

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

- Completion of 3 Analysis workshops, interviews and WebEx sessions
- Configuration of User Experience

Accela Responsibilities:

- Conduct sessions to capture the required look and feel functionality of the Accela Civic Platform system.
- Conduct meetings via email, WebEx, phone, and in person to gather and validate analysis input.
- Build the user experience components as discovered during workshops.

Agency Responsibilities:

- Provide timely and appropriate responses to Accela’s request for information.



- Make available the appropriate Agency key users and content experts to participate in the user experience analysis.
- Complete any additional User Experience updates as desired by the Agency after the workshops are completed.
- Schedule participants and meeting locations for analysis workshop activities.

Acceptance Criteria:

- Completion of 3 of User Experience Workshops.

STAGE 5 – READINESS

DELIVERABLE 15: ADMINISTRATIVE TRAINING

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

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

- **Civic Platform Core Team Training** – up to 2.5 days, 15 max attendees.
- **Civic Platform Admin Usage** – up to 3.5 days, 10 max attendees.
- **Accela GIS** – update to 4 hours, 12 max attendees.
- **Accela Mobile** – up to 1 day, 12 max attendees.
- **Civic Platform Database Schema Fundamentals and Report Manager** – up to 4 hours, 7 max attendees
- **Ad-Hoc Reporting** – up to 4 hours, 7 max attendees.
- **Train-the-Trainer End User Training** – up to 5 days, 10 max attendees

Accela 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 Accela 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 Accela 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. Accela 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. Accela will deliver current training documentation in a format that can be used to customize the documentation. Documents delivered by Accela to the Agency will be valid for the release that the Agency is trained. Documents delivered by Accela may not be shared with any other agency or Company per the Non-Disclosure Agreement.

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

- 1 instance of Daily User Training

Accela Responsibilities:

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

DELIVERABLE 17: USER ACCEPTANCE TESTING (UAT)

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

Accela will provide 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).

Accela will provide assistance to the Agency as needed by providing User Acceptance Testing (UAT) support and a defined testing process. Accela will address and rectify issues discovered during the UAT process as Agency staff executes testing activities. Accela will work with the Agency to develop a test plan and deliver up to 2 sample test scripts, as well as an issue log to track the progress of testing. It should be noted that Accela will plan for a **total of 4 weeks to complete this deliverable**.

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

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

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

Accela Responsibilities:

- Provide recommendations on testing strategy and best practices.
- Lead the Agency in up to 4 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 Accela's request for information.
- Make available the appropriate Agency key users and content experts to participate in user acceptance testing as defined and managed by Agency.
- 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 4 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 test environment to production for daily Agency usage. This date will be agreed to by both Accela and the Agency at project inception. It may be altered only by Change Order agreed to by both parties. In the weeks prior to moving to Production, Accela



will assist in final data conversions, system validation, staff preparation assistance and training, and coordination of deployment.

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

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

Accela Responsibilities:

- Provide on-site resources to support the move to Production effort
- With assistance from the Agency, lead the effort to transfer the system configuration and any required data from Support to Production
- Assist in the development of a Pre-Production checklist that details the critical tasks that must be accomplished prior to moving to Production

Agency Responsibilities:

- Provide technical and functional user support for pre and post Production Planning, execution, and monitoring
- Provide timely and appropriate responses to Accela's request for information
- Assist in the development of a Pre-Production checklist that details the critical tasks that must be accomplished prior to moving to Production
- Make available the appropriate Agency key users and content experts to participate in user acceptance testing as defined and managed by Agency

Acceptance Criteria:

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

DELIVERABLE 19: POST DEPLOYMENT SUPPORT AND TRANSITION TO CUSTOMER SUPPORT

This deliverable is comprised of the post- Production support assistance that Accela will provide to address issues and provide consultative advice immediately following the move to Production for daily use. Accela will provide support for 1 week immediately following deployment (go-live).

Accela will work with the Agency to identify and address issues identified during this period using a Post Production Issues List. This list will be comprised of issues related to the defined deliverables listed in this SOW, which will be addressed by Accela, as well as any other issues that the Agency wishes to track (outside of scope, stage 2, etc.). Examples of issues the Agency is responsible for include training issues, functional changes beyond the scope of this Statement of Work, cosmetic changes, and procedures related to the use of Accela Civic Platform. Specifically, Accela will not be developing or creating additional reports, conversions, interfaces, records types and workflow processes that were not included in the scope of this project during post deployment support.



At the end of the support period, Accela will provide a final a final copy of the issue tracker to the customer and disable the list. Additionally a formal meeting will be scheduled with the Agency, Accela Services Team, and Accela Customer Support. The purpose it to transition support of future issues and questions from the Agency to Accela Customer Support.

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

- 2 staff onsite for week one of go-live (5 days) and remote support thereafter
- Transition of Agency from Services team to Customer Support for ongoing support

Accela Responsibilities:

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

Agency Responsibilities:

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

Acceptance Criteria:

- Execution of 1 week of post-Production support
- Official transfer from the Accela Services project team to the Customer Support



APPENDIX D – DELIVERABLE ACCEPTANCE FORM

Please acknowledge acceptance by:

<p>A</p> <p>Sign and fax this document to:</p> <p>Accela, Inc. YOUR NAME YOUR TITLE Tel: Fax:</p>	<p>OR</p>	<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:		
Accela Manager:		
Project Name / Code:		
Contract / Agreement #:		

Agency agrees that Accela has successfully completed the following Deliverables:

Deliverable #	Source / Reference Details	
	Service Agreement	

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

APPROVALS:

Agency Name

Signature

Title

Date



APPENDIX E – CHANGE ORDER TEMPLATE

SAMPLE CHANGE ORDER – PAGE 1

Agency: CO #:
 Project Code: Date:
 Contract #/ PO #:
 Initiating Department:
 Initiated By:
 Change Category: Product Project Contract Maintenance

PROJECT CHANGE DESCRIPTION/TASK SUMMARY:

1. <title of issue / cause of change>
 Issue details / scope impact:
 - Schedule impact:
 - Resource impact:
 - Cost impact:

2. <title of issue / cause of change>
 Issue details / scope impact
 - Schedule impact:
 - Resource impact:
 - Cost impact:

Total Project Schedule Impact:
 Total Project Resource Impact:
 Total Project Cost Impact:

DISPOSITION COMMENTS:

Disposition: Approved Rejected Closed See Comments
 Date:



SAMPLE CHANGE ORDER – PAGE 2

The above Services will be performed in accordance with this Change Order / Work Authorization and the provisions of the Contract for the purchase, modification, and maintenance of the Accela systems. The approval of this Change Order will act as a Work Authorization for Accela and / or Agency to perform work in accordance with this Change Order, including any new payment terms identified in this Change Order. This Change Order takes precedence and supersedes all other documents and discussions regarding this subject matter.

Accepted By: Agency	Accepted By: Accela, Inc.
By:	By:
Print Name:	Print Name:
Title:	Title:
Date:	Date:



APPENDIX F – RECORD TYPES

The following Record Types are in scope for this implementation:

1. Residential Water Permit
2. Commercial Water Permit
3. Mixed Use Water Permit
 - a. Same processes for Res, Comm, and Mixed (Inspections, Deed Restrictions). (Review Workflow – Front Desk, Permitting, Deed, Inspection)
 - b. Water Usage – Based on fixture count. Track property has a baseline of fixtures. Permit may be used to increase or reduce the number of “active” fixtures.
 - c. Fees are calculated differently (Commercial Acre, Residential Fixture) Use the same base rate (Capacity fee. Changes every July 1st)
 - d. Menu of fees. Select applicable fees based on the project that the permit is being applied for
 - e. Water Allocation Tracking – Jurisdiction (7) can allocate additional water count to a property. Each jurisdiction may have 2-3 allocation counts to allocate from. Allocation report will be from the Accela system to include credits and debits of the allocations. Manually the report will be used to validate the jurisdiction allocation is accurate and not over allocated.
 - f. Check to see if there is a rebate or water credits against the property
 - g. Multiple permits and multiple water sources per property. i.e. Property may have multiple family dwelling which will require multiple permits depending on dwelling.
 - h. Multi – Water sources may come from different accounts. One permit with multiple sources
4. Water Use Permit (Same as other permit. No inspection)
 - a. Issued when an applicant purchased a water entitlement. This will add total number of fixtures or specific commercial uses to their baseline.
 - b. Ability to amend the permit
 - c. System needs to track the total number of available water credits per property
 - d. Entitlement Holder – Track the inventory of water entitlements. (Commercial – acreage, Residential – fixtures). Make sure they do not oversell their inventory. Business rules will be applied by the agency application processor
5. Fire Suppression (No inspection)
 - a. Related to a building permit. A waiver with no fee that tells the water provider to provide a larger water meter to meet the flow rate to support the needed the fire suppression system. (Name, address, prop owner, no fixtures) Same body of a Water permit but no fixtures on it.
6. Water Distribution System Permit or Confirmation of Exemption
 - a. Different process from other permits. This is for properties using onsite wells or mobile water distribution systems. Track base information. Allow for attachments. No workflow or automation on this permit. Would need manually track fees against this record. Can be for one or multiple properties
 - b. Ability to amend the permit
 - c. Applicant has to comply with the well registration. This is handled by water resource management dept. Need ability to upload Water Resource Management documentation.
 - d. Tracking the number of water allocation from the well based on the permits that will be applied for against the property(s) well.
7. Hydrant Meter Permit (No Inspection, OTC))
 - a. Ability to collect a fee against it. No water usage data collected. Permit that goes to the provider to setup a meter for new construction.



-
- b. Ability to amend the permit
 - 8. Water Consumption
 - a. Capture water consumption for special situations for a property. Upload data from Excel or manual upload. Unique ID would be premise #(property ID) or meter. Record to store info. No workflow. Just used for data collection.
 - 9. Pre-App Consultation
 - a. Collect a consultation fee. No workflow. Track time.
 - 10. Rebate – Manual workflow
 - a. Application to see if the property qualified for a rebate. Can we issue them a check. Did they get a rebate? What was the value? What was it for? Is there a water permit that requires them to pay the rebate back
 - 11. Water Credit – Form and field data validation.
 - a. Generated through a rebate. Permit if they reduce water usage (less fixtures) or a water credit application)
 - b. Water credit has an expiration. Notification should be sent to the property owner so they can re-apply
 - 12. Complaint
 - a. General complaint form. i.e. Water waste with site inspection. Tracked against property for water waste. Fines go up for repeat offender
 - 13. Violation\Non-Compliance
 - a. Inspection on permit or complaint
 - b. First letter is a warning
 - c. Second letter is a fine
 - d. Abatement – If continued non-compliance, legal would get involved for further action
 - 14. Conservation
 - a. When property changes title, new property owner needs to ensure property is in compliance with conservation regulations. Put in the transfer date and the status of the compliance. Generate an inspection and remediation activities.