

# **Statement of Work**

## **Environmental Health Decade Migration to the Accela Civic Platform**

**San Bernardino County, CA  
Environmental Health Department**

2/16/2024

Version 1.7

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## DOCUMENT CONTROL

| Date      | Author  | Version | Change Reference                                  |
|-----------|---------|---------|---------------------------------------------------|
| 8/17/21   | JWinkel | 1.0     | SOW Created                                       |
| 10/18/21  | JWinkel | 1.1     | Removed integrations and reports. Updated price.  |
| 11/4/21   | JWinkel | 1.2     | Accepted County's Modifications                   |
| 11/15/21  | JWinkel | 1.3     | Added training for exporting data                 |
| 03/10/22  | JWinkel | 1.4     | Change orders changed to a negotiated rate.       |
| 2/28/2024 | PPerez  | 1.6     | Update Introduction to reflect March 12, 2024 SSA |
| 3/5/2024  | RKoziol | 1.7     | Updated dates and timeline                        |

## INTRODUCTION

This Statement of Work ("SOW") dated June 11, 2024, sets forth the scope and definition of the project-based professional services (collectively, the "Services") to be provided by Accela, Inc., its affiliates and/or agents ("Accela") and San Bernardino County, CA ("Agency" or "Customer").

This SOW is governed by the Accela Subscription Services Agreement dated March 26, 2024 (the "Agreement"). In the event of any conflict between the Agreement and this SOW, the terms of the Agreement shall govern.

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

## EXECUTIVE SUMMARY

The County's Environmental Health Department has requested an upgrade from EnvisionConnect to the Accela Civic Platform and Environmental Health Civic Application. This document outlines the configuration and onboarding activities, captures our understanding of what configurations the County will receive and provides visibility into how Accela will perform the onboarding of your solution.

The subscription includes the following SaaS products:

- Environmental Health Civic Application
- Accela Citizen Access Public Portal (ACA)
- Accela Inspector Mobile Application (AMO)
- GIS
- Construct API

## SOLUTION OVERVIEW

This SaaS based solution will provide the following functionality:

- Application Intake from a Citizens Portal as well as in the back office
- Permit Review, Issuance, Renewal, Amendment
- Inspections
- Code Enforcement
- Mobile and remote inspection
- Integrations with third-party systems
- Payment processing
- Time Accounting
- Reporting

Accela has worked with the Agency in identifying the processes, reports and integrations required for the success of the solution. The list of processes to be implemented is found in Appendix A: Solution Inventory.

- 43 processes (migrated)
- 1 custom process (Lab results)
- 120 Decade Report Conversions

Integrations are implemented by leveraging Accela's Construct API and standard adapters. This implementation includes the following integrations:

- Payment Processor (Forte)<sup>1</sup>
- Plan Check software to be identified FY 24.25<sup>2</sup>

Accela will provide training to the Agency as defined in Appendix H: Training.

## PROJECT METHODOLOGY

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

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

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

| Stage Title      | Stage Overview                                                                                                                                                                                                   | Activities and Artifacts                                                                                                                                                                                                                               |
|------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Stage 1: Define  | The Define stage sets the framework for how the project will be managed throughout the project life cycle.                                                                                                       | <ul style="list-style-type: none"> <li>• Project Schedule</li> <li>• Project Management Plan</li> <li>• Project Kickoff</li> <li>• Solution Provisioning</li> </ul>                                                                                    |
| Stage 2: Refine  | The Refine stage begins the knowledge transfer of the Agency's Accela Civic Platform solution and promotes adoption of the new system. This stage completes the Agency-specific tailoring of the configuration.  | <ul style="list-style-type: none"> <li>• Core Team Training</li> <li>• Tailoring Session</li> <li>• Review and Verification testing</li> <li>• Conference Room Checkpoint</li> <li>• Integration Designs</li> <li>• Data Conversion Kickoff</li> </ul> |
| Stage 3: Develop | The Develop stage builds upon the tailored solution from the Refine Stage adding integrations, and running the data conversion efforts. The result of this stage is a fully built solution ready for deployment. | <ul style="list-style-type: none"> <li>• Business Automation Configuration</li> <li>• Interface development</li> <li>• Report conversions</li> <li>• Review and Verification testing</li> <li>• Conference Room Checkpoint</li> </ul>                  |
| Stage 4: Deploy  | After all development work has been completed, the system is ready for User                                                                                                                                      | <ul style="list-style-type: none"> <li>• Training Plan</li> <li>• Test Plan and Test Cases</li> </ul>                                                                                                                                                  |

<sup>1</sup> Integration beyond the planned integration with Forte will be covered through a separate Change Order, if necessary, once the replacement service has been selected by SBC EHS.

<sup>2</sup> Accela will provide either: (a) integration services to a plan review software that has been previously integrated to the Accela Civic Platform or (b) 60 Hours of Custom Scripting.

| Stage Title | Stage Overview                                                                                                     | Activities and Artifacts                                                                                                                                                                                                                                               |
|-------------|--------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|             | Acceptance Testing (UAT), End User Training, and the final data conversion and cutover activities support Go-Live. | <ul style="list-style-type: none"> <li>• User Acceptance Testing</li> <li>• End User Training</li> <li>• Final extract for production</li> <li>• Final conversion load into Production</li> <li>• Go Live Support and Transition to Accela Customer Support</li> </ul> |

## GOVERNING PRINCIPLES

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

- **Clear Business Objectives** – The Customer has clearly documented their business objectives before the commencement of onboarding and shared those objectives with Accela.
- **Agency-specific Tailoring Inputs Identified and Documented** – The Customer has documented and has a clear understanding of their processes to enable the Accela team to perform solution tailoring. For example, the Customer must have a clear understanding on how fees are calculated to support the solution.
- **Dedicated Agency Participation** – Agency acknowledges and agrees, throughout the duration of the services, to have (i) its staff and/or agents Agency personnel actively involved in the Project, and (ii) its software, hardware and other technology performing (or available for performance), each as specified in the agreed upon Project Plan (such Agency personnel and technology, collectively the Agency resources). Accela will communicate insufficient participation of Agency resources through Project Status Reports and will indicate actual and potential impacts to the Project Timeline. Accela will work the Agency's Executive Sponsors and department leaders to determine appropriate team member involvement. This could range from full-time, during early analysis meetings, to part-time during the technical development phase. Please see [Appendix E](#) for a full description of Agency resources.
- **Executive Sponsorship, Governance, and Change Control** – The initiative is supported by executive sponsors within the Agency who will drive the Agency staff participants towards overarching goals and standardization/adoption of the Civic Application Solution. The executives will remove roadblocks, quickly make decisions, support risk mitigation, and resolve escalated issues. Effective governance during the onboarding period and a tight change control processes for the subscribed solution requires alignment across Agency stakeholders. Throughout the project, the teams will encounter issues and decisions that require engagement of the joint Agency/Accela governance team. Invariably, changes to the identified solution will arise and the governance process must resolve these issues with urgency in order to avoid impacts to the schedule and scope.
- **Accela Standard Implementation Methodology** – Agency acknowledges that is willing to adhere to and will adopt Accela's implementation methodology. Please see [Appendix D](#) for a full description of the Accela implementation methodology.
- **Knowledge Transfer** – Agency personnel must participate in all the implementation stages and activities for Accela to transfer knowledge to the Agency. Once Post-Production transition tasks

are completed by Accela, Agency personnel will assume all day-to-day business operation of the solution.

## ADMINISTRATION

### PROJECT TIMELINE

The remainder of the project is estimated to take **13 months**. The approximate completion date is February 28, 2025. A detailed schedule will be developed during the Define stage in collaboration with Accela and Agency Project Manager. If Agency and/or Accela determines they cannot meet the timeframes estimated in this SOW, this will be escalated at the start of the project as discussion for change order.

Upon completion of the work defined above, this contract will be closed.

### PROJECTS PUT ON HOLD AND AGENCY DELAYS

It is understood that sometimes Agency priorities are revised requiring the Agency to place the Accela implementation on hold. The Agency must send a formal written request to Accela to put the project on hold. Delays of two (2) weeks or more that have a tangible impact to Accela's resource plan are subject to change order.

If an Agency-based delay puts the project on hold for more than 90 days or is non-responsive to Accela communications for a term of 30 calendar days, Accela reserves the right to terminate the contract and negotiate new terms. If an Agency-based delay puts the project on hold past the termination period, Accela reserves the right to terminate the contract at the time of the delay. After that time, Accela can choose to cancel the rest of the Statement of Work. To finish the project will require a new Statement of Work at new pricing.

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

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

### PAYMENT TERMS

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

#### Deliverable-based Assumptions:

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

The following lists each deliverable associated with a payment, and its criteria for acceptance.

| Stage Title        | Deliverable                 | Acceptance Criteria                                                                                                                                      | Deliverable Amount |
|--------------------|-----------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------|
| Stage 1:<br>Define | Project Schedule            | <ul style="list-style-type: none"> <li>• Sign-off validating the baseline project schedule has been finalized between both parties</li> </ul>            | \$30,000           |
|                    | Project Management Plan     | <ul style="list-style-type: none"> <li>• Sign-off validating the Project Management Plan has been finalized between both parties</li> </ul>              |                    |
|                    | Project Kick-off            | <ul style="list-style-type: none"> <li>• Sign-off validating the Project Kickoff meeting has been conducted</li> </ul>                                   |                    |
| Stage 2:<br>Refine | Core Team Training          | <ul style="list-style-type: none"> <li>• Complete Core Team Training</li> <li>• Sign-off validating the Core Team Training has been conducted</li> </ul> | \$20,000           |
|                    | Solution Tailoring Workshop | <ul style="list-style-type: none"> <li>• Conduct Solution Tailoring Workshop</li> </ul>                                                                  | \$50,000           |

|                                |                                       |                                                                                                                                                                                                                                                                                                 |                     |
|--------------------------------|---------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------|
|                                |                                       | <ul style="list-style-type: none"> <li>Sign-off validating the Workshop session have been conducted</li> </ul>                                                                                                                                                                                  |                     |
| Stage 3:<br>Develop            | Data Conversion Mock Run 1            | <ul style="list-style-type: none"> <li>Source data cleansing, extract, and transform to staging for mock run (Agency)</li> <li>Load from staging into target for mock run (Accela)</li> </ul>                                                                                                   | \$50,000            |
|                                | Report Conversion                     | <ul style="list-style-type: none"> <li>Report conversion complete</li> </ul>                                                                                                                                                                                                                    | \$60,000            |
|                                | Interface Development                 | <ul style="list-style-type: none"> <li>Interface development complete, based on approved specification(s)</li> </ul>                                                                                                                                                                            | \$19,000            |
| Stage 4:<br>Deploy             | User Test Execution Support           | <ul style="list-style-type: none"> <li>Support Initial User Testing period</li> </ul>                                                                                                                                                                                                           | \$30,000            |
|                                | User Test Completion                  | <ul style="list-style-type: none"> <li>Support defect resolution and retesting.</li> <li>Resolution of critical and high severity defects related to configuration or custom development (sign-off is not dependent on resolution of product defects)</li> </ul>                                | \$40,000            |
|                                | Final Conversion and Cutover/ Go Live | <ul style="list-style-type: none"> <li>Deployment support prior to moving to Production</li> <li>Production system is available for daily use by the Agency</li> </ul>                                                                                                                          | \$50,000            |
|                                | Transition to Customer Support        | <ul style="list-style-type: none"> <li>Execution of post-production stabilization support</li> <li>Official transfer from the Accela Services project team to Accela Customer Support (sign-off is not dependent on resolution of defects that are transitioned to Customer Support)</li> </ul> | \$23,710            |
| <b>TOTAL DELIVERABLES COST</b> |                                       |                                                                                                                                                                                                                                                                                                 | <b>\$372,710.00</b> |

## EXPENSES

The overall fee listed in the Payment Terms section is inclusive of expenses. The Agency will not be billed for travel expenses or travel time. The Agency will not receive expense reports or receipts.

Accela may provide up to a total of **two (2) trips** for onsite Services. A “Trip” is defined as one (1) person, for up to four consecutive days, allowing for travel time on Monday morning and Friday afternoon. Should the customer require more onsite trips, a Change Order will be required prior to additional travel commencing to cover the cost of those additional trips.

## CONTRACT SUM

The total amount payable under this SOW, as calculated for the above-mentioned fees and expenses, is **\$372,710** including travel expenses.

The estimated fees for this SOW are predicated on the timely completion of Project milestones. However, should completion of milestones slip due to actions or inactions of Agency, and should this slippage result in material effort to Accela in excess of the hours provided for in this document, Accela will produce a Change Order at a negotiated rate. for additional hours in support of the scope and deliverables contained herein. Any change order will need to be approved by both Agency and Accela. Change orders will need to be approved within three (3) business days of delivery to avoid a halt of work on the Project.

## CHANGE ORDERS

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

## EXPIRATION

The scope and terms of this SOW may expire within ninety (90) calendar days.

## DISCLAIMERS

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

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

## ASSUMPTIONS

### GENERAL SCOPE ASSUMPTIONS

- Any coding or integrations not specifically described in this document are not in scope.
- Development of custom training materials are not in scope of Accela Services.
- Scope of the Project is based on discovery sessions with Agency prior to the SOW development.
- Agency is responsible for creation of test cases used in User Acceptance Testing.

### PROJECT RESOURCING ASSUMPTIONS

- Resources expected by the Agency and Accela are listed in Appendix E.
- Accela personnel will attend Agency executive steering committee meetings, either in-person or remotely.
- In the pricing, Accela has assumed the appropriate resourcing to ensure success for the scope outlined. Additional support requested by Agency over this level of resourcing would necessitate a Change Order that could impact the cost of the project.
- Accela personnel will not be required to provide Services on-site if doing so would put Accela personnel at actual or potential risk, as determined at Accela's sole discretion.
- Accela is not responsible for impacts to project timeline created by dependency on Agency third party consultants. Timeline changes will result in a Change Order for extension of Accela project resources caused by Agency third party consultant actions (including availability) resulting in additional time or scope.
- When the project team works onsite at an Agency facility, suitable workspace will be provided and equipped with appropriately functional network access to and connectivity with all systems, networks, and data as necessary to perform the project. Agency will also provide necessary security badges, parking passes as required.

### ACCELA TECHNICAL ASSUMPTIONS

- Agency will ensure that Accela resources have access to a Dev or Test version of the 3rd party system for interface development. All interfaces will be developed against one (1) agreed upon version of the 3rd party system.
- Agency will select/purchase/acquire the appropriate third-party software prior to the Project Start Date. In the event third party software is not available and provisioned by Project Start Date, a change order may be needed to cover delays in project work.

## SIGNATURES

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

#### **ELECTRONIC SIGNATURES**

This Agreement may be executed in any number of counterparts, each of which so executed shall be deemed to be an original, and such counterparts shall together constitute one and the same Agreement. The parties shall be entitled to sign and transmit an electronic signature of this Agreement (whether by facsimile, PDF or other mail transmission), which signature shall be binding on the party whose name is contained therein. Each party providing an electronic signature agrees to promptly execute and deliver to the other party an original signed Agreement upon request.

#### **ACCELA, INC.**

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

\_\_\_\_\_  
Michael E. Gigliello  
*Name - Type or Print*

\_\_\_\_\_  
Controller  
*Title*

\_\_\_\_\_  
*Date*

#### **San Bernardino County, CA**

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

\_\_\_\_\_  
Dawn Rowe  
*Name - Type or Print*

\_\_\_\_\_  
Chair, Board of Supervisors  
*Title*

\_\_\_\_\_  
*Date*

## APPENDIX A: SOLUTION INVENTORY

This appendix lists the subscribed Solution Inventory. This inventory has been created based on consultation with the Agency. For solutions where there is a pre-built Accela Civic Application, solution type is denoted as "Civic Application". This list represents all record types that are in scope for the implementation.

|    | Agency Process (Record Type)                      |
|----|---------------------------------------------------|
| 1  | 10-10 Administrative                              |
| 2  | 11-11 Food Worker Program                         |
| 3  | 12-12 TFF/CFM/Swap Meet                           |
| 4  | 13-13 Mobile Food Facilities and Sidewalk Vendors |
| 5  | 14-14 Vending Machines                            |
| 6  | 16-16 Retail Food Protection                      |
| 7  | 17-17 Retail Food Plan Check                      |
| 8  | 18-18 Wholesale Food                              |
| 9  | 19-19 Wholesale Food Plan Check                   |
| 10 | 20-20 Milk and Dairy                              |
| 11 | 21-21 Massage Clinics                             |
| 12 | 22-22 Bed & Breakfasts                            |
| 13 | 23-23 Hotels/Motels                               |
| 14 | 24-24 Apartments                                  |
| 15 | 25-25 Body Art                                    |
| 16 | 26-26 Land Use                                    |
| 17 | 27-27 Liquid Waste Haulers                        |
| 18 | 28-28 Refuse Haulers                              |
| 19 | 30-30 Detention Facilities                        |
| 20 | 31-31 Camps                                       |
| 21 | 32-32 Cottage Food                                |
| 22 | 34-34 Retail Food Host Facility                   |
| 23 | 35-35 Retail Food Host Facility Plan Check        |
| 24 | 36-36 Recreational Health                         |
| 25 | 37-37 Recreational Health Plan Check              |
| 26 | 38-38 Natural Bathing Places & Slides             |
| 27 | 39-39 Charitable Feeding                          |
| 28 | 40-40 Mosquito and Vector Control                 |
| 29 | 41-41 OWTS Review                                 |
| 30 | 42-42 SHT / DMA / ALT Systems                     |
| 31 | 43-43 SWFP Permitting                             |
| 32 | 44-44 SWFP Inspections                            |
| 33 | 45-45 Wells                                       |
| 34 | 46-46 Water Systems                               |
| 35 | 47-47 Backflow Prevention                         |
| 36 | 48-48 Medical Waste                               |
| 37 | 61-61 Lead                                        |
| 38 | 89-89 Penalty Fees                                |

|    |                            |
|----|----------------------------|
| 39 | 90-90 Training             |
| 40 | 91-91 Billing Activity     |
| 41 | 99-99 Adjustments          |
| 42 | AS-APSA Surcharge Category |
| 43 | CE-CECL Program Category   |
| 44 | Lab Results                |

## APPENDIX B: CIVIC APPLICATION TAILORING FRAMEWORK

Accela will perform the tailoring identified below based on the Civic Application record types listed in [Appendix A Solution Inventory](#).

Accela will conduct of solution tailoring sessions for the following areas:

### FEE SCHEDULE CONFIGURATION

Accela will configure fee items for each record in the Solution Inventory. A fee item represents a fee with a distinct general ledger account and item description on the invoice. Accela will configure each unique fee item based on the native fee formulas in the Civic Application, which include flat fees, fees based on a specific range, and fees using fee indicators. Examples include fee calculations based on the number of employees or a square footage fee for a building. Advanced fee item setup, such as automating a fee calculation using the advanced script engine logic, is not included in the subscribed service.

### NEW AGENCY DEFINED DATA FIELDS CONFIGURATION

The Agency can request up to a total of fifty (50) new or modified agency defined data fields above what is already provided in the Accela Civic Applications to track required data elements driven from Agency business processes and municipal reports, such as Number of Sinks or Accessible Ramp Degree Incline. Accela will configure each new or modified agency defined data field using one of nine data types: text, date, y/n radio button, number, dropdown list, comment text area, time, money or checkbox.

### WORKFLOW

The processes in EnvisionConnect will be mapped to the Accela Environmental Health Civic Application. The Civic Application includes a predefined set of workflows. Processes within EnvisionConnect will become workflows in Accela. It is expected that the customer will adopt the workflows within the Accela Civic Application.

### INSPECTION CONFIGURATION

Accela will configure up to ten (10) discrete inspection types with checklists for use in the system. The Agency must provide all inspection and checklist information prior to Tailoring Workshops. Accela will also configure up to ten inspectors in the system, including inspection district and discipline. The Agency is responsible for providing GIS layers for inspection districts.

### PRE-DEFINED USER GROUP PERMISSION DISTINCT UPDATES

Accela will provide up to ten (10) distinct updates to the pre-defined user group permissions configured in the deployed Accela Civic Application. Using the Accela Roles and Functions Matrix document, the Agency will indicate which permissions need to be updated for the user group role. For example, if the Agency wants the inspector role to collect fees and payments, this will be an update to allow additional access to the current role defined. Each permission update, add or removal of access for a defined user role, is considered a distinct single action change.

### CITIZEN ACCESS CONFIGURATION

Accela utilizes the Civic Application to complete the configuration for the Agency's public portal, including branding, updating the record instructional text with Agency language, descriptive help instructions for

specific Agency-defined data fields, and updating the online disclaimer text. Accela will perform these activities for the records in the Solution Inventory.

The following use cases are included in the subscribed solution:

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

System will also provide shopping cart functionality, i.e., access the shopping cart throughout the order session, including:

- Changing items in the cart
- Removing items in the cart
- Adding items to the cart
  - Item descriptions
  - Item prices
  - Convenience fees
  - Total cost

## STANDARD REPORT BRANDING

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

## FEATURE ENABLEMENT

The following are standard features included in the Accela Civic Platform. The following describes the tailoring expected for each.

- GIS - Agency staff use maps (through GIS integration) to plan activities such as inspections.
- Mobile Application Setup – Branding & Agency specific configuration (i.e., default filters, offline storage setup).
- Document Upload – Applicant, Licensed Professionals, Authorized Agent, and staff can upload documents associated to the permit application. Includes configuration: EDMS and Permissions for ADS + 5 custom document types.
- Global ACA Setting – Logo, header footer, Disclaimer and GIS Links.

## ACCELA GIS CONFIGURATION

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

## **CONFIGURING CASHIERING AND POINT OF SALE**

Accela will configure Cashiering with the following functionality:

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

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

## APPENDIX C: CUSTOMIZATION

### REPORT CONVERSION

Accela will convert **120** of the Agency's existing EnvisionConnect reports to work with the Accela Civic Platform. These reports will be converted as is. No formatting or other changes will be made to the reports.

### INTERFACE DEVELOPMENT

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

### PAYMENT PROCESSOR

Accela will implement an interface redirect adapter between Accela Citizen Access (ACA) and **Forte** to accept payments, redirecting the user to the one-time payment page of the payment site and paying associated fees in Accela (once payment is complete). This interface will be developed against 1 (one), agreed upon version of payment processor.

The Agency has indicated the following parameters of the project:

- No partial payments in ACA
- Partial payments may be handled manually in the backoffice
- Refunds handled manually
- No trust accounts
- Additional 5 fields of metadata from direct transaction/permit records sent to payment processor
- Single merchant account

Accela Responsibilities:

- Conduct Interface Analysis sessions
- Work with Agency staff to develop interface specifications document.
- Build all aspects of the interface that interact directly with the Accela Civic Platform.

Agency Responsibilities:

- 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.
- Assist in the interface specification development and data mapping process.
- Review and approve the interface specification documents.
- Validate interface through testing.

- Updates to interface, post go-live, due to changes in 3<sup>rd</sup> party system or Agency business processes.

#### Acceptance Criteria:

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

#### **BLUEBEAM**

Accela will provide a standard integration that covers the full lifecycle of plan review from application to permit closure.

1. Application Intake - Project Creation
2. Assign reviews - Create Session
3. Perform reviews
4. Deliverables
  - a. Revisions Required
  - b. Plans are approved

The Connector will allow the bi-directional sharing of data to include:

- Ability to review session that is already open and get added to the same session
- Ability to push and pull documents and comments
- Ability to add documents to an existing session
- Ability to view sessions
- Ability to send documents to sessions
- Ability to configure document security to include flattening
- Ability to organize files into folders within Studio Project

#### **DATA EXPORT**

Accela will train the customer on scheduling and building the following:

- Export of SQL data
- Zipping the data into a compressed format
- Posting the data to an FTP site

#### **DATA CONVERSION**

Converting historic/legacy data from the Agency's systems is a critical activity for the success of this project. Accela will train the Agency on our Data Conversion tool. The Agency will be involved in data mapping and cleansing.

## APPENDIX D: ACCELA METHODOLOGY

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



### DEFINE

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

### PROJECT INITIATION

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

Accela will review with Agency the subscribed solution inventory through a facilitated orientation workshop. The Solution Inventory illustrates the Agency's subscribed Civic Application solution by mapping the Agency's record types to Accela Civic Application features (as shown in [Appendix D](#)).

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

Agency Staff:

- Agency Project Sponsor
- Project Manager
- Organization Change Manager

Accela Staff:

- Regional Director
- Project Manager
- Solution Architect
- Implementation Lead

Accela Responsibilities:

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

Agency Responsibilities:

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

## PROJECT SCHEDULE

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

The project schedule is managed using Microsoft Project. The project schedule assumes timely completion of Agency-led activities and tasks, availability of key Agency resources, and collaboration and availability of any third-party vendor resources. Late (per mutually agreed project schedule) Agency tasks may adversely

impact overall project timeline. Material delays impacting the critical path by more than 10 business days of the baseline schedule are handled via the Change Control process defined in the Project Management Plan.

**Output:**

- Mutually agreed upon Project Schedule that will service as the baseline schedule.

**Accela Responsibilities:**

- Finalize staffing for the Accela project team.
- Finalize the project schedule that includes resource allocation for all tasks (in cooperation with the Agency Project Manager).

**Agency Responsibilities:**

- Provide input to tasks and duration in Project Schedule.
- Finalize staffing for the Agency project team. Guidelines and recommendations for the Agency project staffing are addressed in the Project Staffing section of this onboarding document.
- Sign-off on baseline Project Schedule milestone.

## PROJECT MANAGEMENT PLAN

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

**The following outputs are included:**

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

**Accela Responsibilities:**

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

#### Agency Responsibilities:

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

#### SOLUTION PROVISIONING

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

#### Accela Responsibilities:

- Provision the subscribed Civic Applications in the cloud non-production development and test environments.

#### Agency Responsibilities:

- Validate that the subscribed solution is available.

#### PROJECT KICKOFF MEETING

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

#### Accela Responsibilities:

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

#### Agency Responsibilities:

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

#### REFINE

The Refine stage begins the knowledge transfer of the Accela Civic Platform and adoption of the new system. This stage is where tailoring of the Civic Application for the Agency is performed. Accela starts this stage with training the Agency's core team on the subscribed Accela solution, then conducts Civic Application Tailoring Workshop readiness sessions. Following these sessions, the Tailoring Workshops begin, using the Accela Civic Application non-production system real-time review of the provisioned Solution Inventory. During the workshops, Accela will demonstrate the Civic Application solution components that pertain to the Agency's application/record type(s), identify areas available for tailoring based on Appendix A, and make real-time tailoring updates as appropriate. As the Tailoring Workshops

continue for additional application/record types, the Accela team will evaluate points of integration and collaborate with the Agency on the concept design for these integration points. During the Refine stage the Accela team will also orient the Agency to the legacy data conversion tool, Accela schema, and associated activities. Upon accepting the configuration, the Agency and Accela team will conduct a Conference Room Checkpoint where Agency stakeholders will be invited to an overview of the system at this point in the project.

### CIVIC APPLICATION SOLUTION CORE TRAINING

Accela will provide remote instructor-led training for Agency core onboarding team members that focuses on the subscribed Civic Application solution and associated administration/tailoring toolsets. This training is an essential component to project success. Agency staff involved in the tailoring, testing, and validation of the solution must be trained prior to the tailoring workshops. This training will help the Agency onboarding team understand the Agency's subscribed Solution Inventory.

#### Accela Responsibilities:

- Coordinate with Agency and schedule the appropriate day/time and confirm the Civic Application Solution Training content outlined in the provided agenda.
- Provide up to 4 days remote Civic Application Solution Core Training.
- Provide Agency access to the Accela Learning Management System (LMS), provide instruction on how to register and login, along with how to search for and find the online training content.

#### Agency Responsibilities:

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

### ENVISIONCONNECT MIGRATION

Accela will migrate the existing processes found in EnvisionConnect to the Accela Civic Platform. This includes: process flows, custom fields, fees, statuses, inspection types, checklists, non-checklist inspections, users and groups. Processes will be mapped to the predefined environmental health workflows within the system. Accela will attempt to include all the requirements listed in Appendix I before solution tailoring begins. Items that require clarification will be completed after the tailoring session.

### ACCELA CIVIC APPLICATION SOLUTION TAILORING

Following the system provisioning and the EnvisionConnect migration, the team will begin tailoring the Agency's Civic Application Solution. Please refer to Appendix A for the estimated tailoring. Throughout the workshops, Agency staff will continue to learn how the Civic Application features are mapped to Agency record types and to their end-to-end processes.

## WORKSHOP ORIENTATION

Prior to conducting the individual tailoring workshops, Accela will conduct a 1-day workshop orientation. The key Agency staff that will participate in the workshops will all attend the orientation. During this session, Accela will:

- Review dates and times of all workshops, as well as required participants of each
- Describe expectations of the workshops and the format/agenda of each
- Review Appendix A Tailoring Framework
- Review roles and responsibilities of the workshops and final goal (conference room checkpoint)

## TAILORING WORKSHOP

Accela will conduct the workshop with agency personnel to review and tailor the solution components. During the Accela-facilitated workshop, we will review a subset of the records. For records not reviewed in an Accela-facilitated workshop, the Agency will have access to the working software solution in order to perform the remaining reviews independently.

Tailoring covers the following topics:

- Review Intake in public portal to validate items such as data elements, documents, disclaimer, and fees
- Review Intake from back-office to validate items such as data elements, documents, and fees

Workshop will adhere to the following format:

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

It is imperative that the above process occurs within the Project Schedule timeframes to delay subsequent activities and stages. Agency must commit all necessary SME's and IT personnel for the appropriate sessions as outlined by the Accela and Agency Project Managers.

### Output:

- Solution Tailoring Workshop
- Document the Tailoring Punch List (items unresolved during the workshops to be closed prior to or during the subsequent Finalization and Conference room checkpoint.)

### Accela Responsibilities:

- Facilitate solution tailoring workshops per the agreed project schedule.
- Update solution configuration based on workshop decisions.

### Agency Responsibilities:

- Designate and authorize the Responsible Expert for each workshop who will make decisions and represent the department/business.
- Make available the appropriate Agency key users and content experts to provide required information, participate in the workshops and verify the accuracy of the tailored configuration.

- Provide any documentation requested by Accela, including fee schedules; commonly used applications, reports and forms; and other relevant information.
- Schedule participants and meeting locations for workshop activities.
- Provide three to five Agency SMEs to test/review/confirm the tailored system prior to moving to the next scheduled project activity.

### **FINALIZATION AND CONFERENCE ROOM CHECKPOINT**

The purpose of the Finalization Workshop is to work down the open configuration gaps (the Tailoring Punch List - those items remaining after the Tailoring workshops), driving closure of the Tailoring activity. The Finalization Workshops are time-boxed (as defined in the Project Schedule) and require dedicated time from the Agency and Accela project teams to rapidly close the open gaps. New items identified during the Finalization Workshop outside of the Punch List must be completed within the established time box for the Finalization Workshop. If the new item cannot be completed within the established time box, the Change Control process is triggered.

When the Tailoring Punch List is resolved, the Agency Responsible Expert will sign the Deliverable Acceptance Document, documenting finalization of the solution configuration.

To promote information sharing outside of the day-to-day project team following the Finalization Workshop, the Agency's Responsible Expert will demonstrate the work-in-progress software to key stakeholders during a Conference Room Checkpoint. The demonstration will cover 1-3 application types that demonstrates the solution from end-to-end.

Finalization Workshop expectations:

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

Conference Room Checkpoint expectations:

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

Output:

- Finalized tailored solution ready for the Develop stage

Accela Responsibilities:

- Close out agreed upon action items from the Punch List to support the Finalization Workshop.

- Assist the Agency's Responsible Expert in identifying a scenario to support the Conference Room Checkpoint.
- Produce the Detailed Configuration Report for all records.

#### Agency Responsibilities:

- Provide timely and appropriate responses to Accela's request for information.
- Make available the appropriate Agency key users and content experts to participate in creating the system in an effort to learn about the system (knowledge transfer).
- Participate in the Finalization Workshop to verify that the identified configuration Punch List items from the Tailoring workshops have been closed.
- The Agency (Responsible Expert) will facilitate the Conference Room Checkpoint.

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

### REPORT INVENTORY

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

#### Accela Responsibilities

- Map agency report needs to the reports available within the subscribed Civic Application Solution.
- Perform standard/minor branding updates (e.g., Agency logo and contact information) for Agency's subscribed solution reports.
- Train Agency report writing staff on Accela ad-hoc reporting tool (for custom reports).
- Prepare/validate the standard report(s) with the Agency.

#### Agency Responsibilities

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

### DEVELOP

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

The subscribed Civic Application Solution includes pre-defined business process automation/validation. For example, common business rules are included such as sending an email to an applicant when a record is submitted and preventing record issuance when a balance is due. There is no tailoring of the automations as part of the onboarding solution. If custom solutions are defined in the tailoring workshops, these components are built by the Agency, and unit tested during the Develop stage.

## INTEGRATIONS

For each integration listed in Appendix C, Accela will work with Agency to document the specification document for the integration. Results will be captured in an Interface Specification Document. It is expected all interfaces will use Accela's Construct API, web services or batch engine. No custom or third-party integration tool will be used to accomplish input or output of data to/from the Accela system. In other words, data coming into Accela and data coming from Accela will use the existing integration technology. Agency is responsible in gaining appropriate system access to support the integration from appropriate application owners (including on premises or cloud/hosted, etc.) and handling all coordination with 3<sup>rd</sup> party vendors. All interfaces will be developed against one (1) agreed upon version of the 3<sup>rd</sup> party system.

### Accela Responsibilities:

- Develop interface specification documents for each interface in scope.
- Develop and unit test interface per signed specifications.

### Agency Responsibilities:

- Review interface specifications and provide one round of feedback.
- Test each report to ensure it is built and functioning per signed specification and provide one round of feedback.
- Any additional changes identified during review and testing beyond the scope identified above may be subject to a Change Order request.
- Make available the appropriate key users and system experts to participate in the integration development and validation activities.
- Provide links and credentials for third party systems.
- Handle all coordination with 3<sup>rd</sup> party vendors including 3<sup>rd</sup> party licensing, and end to end testing between Accela Civic Platform and 3<sup>rd</sup> party system.

## ACCELA GIS CONFIGURATION

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

- Look up permit information and parcel information from the 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 Accela Citizen Access).

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

The following will be executed for this task:

- Configuration of xAPO
- Setup of 1 Dynamic Theme
- Setup of 5 Attribute Mappings (for any new data fields added to GIS component)

**Accela Responsibilities:**

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

**Agency Responsibilities:**

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

## DATA CONVERSION

Converting historic/legacy data from the Agency's systems is a critical activity for the success of this project. The Agency will be responsible for Data Conversion validation

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

- The Civic Application solution tailoring must be finalized before Accela will support the data conversion mapping effort.
- The standard data conversion includes the conversion of transactional data to the Accela database when a configured destination exists. In the event there is no destination for legacy transactional data then it will be required to be converted as best fits into another area of the configuration or excluded from the conversion effort.
- The Civic Application solution tailoring must be finalized before Accela will support the data conversion mapping effort.
- Conversion of transactional tables, Address/Parcel/Owner (APO) data, Professional License data is executed "As-is" from the staging area into Accela. "As-is" means that the data will be transformed as mapped to existing configuration elements in Accela. The conversion process will not create configuration data or alter the mapped data when processed into Accela. Additionally, this means

if invalid, inaccurate, or incomplete data is provided, it will be loaded into Accela “As-Is”. All data cleanup must occur prior to load from staging area into Accela.

- The standard document conversion may be utilized to convert record/permit level attached electronic documents into the configured Accela Document Service (ADS). In the event a 3<sup>rd</sup> party EDMS is used by Accela Civic solution, it is still possible to convert documents if the 3<sup>rd</sup> party interface supports the create method.
- At a minimum the electronic document(s) to be converted must exist in a Microsoft Windows accessible file system (e.g., NTFS, FAT32) and have the ability to identify the associated Record ID in order to be converted. In the event files exist in a database they must be extracted into a windows file system prior to being evaluated for conversion.

#### Accela Responsibilities:

- Setup of a staging area for the Agency to run migration scripts to cleanse the data as they map the data to the Accela Civic Solutions
- Load two mock run migrations from staging to test once the Agency has completed their data cleansing and data mapping process—once for data validation testing and a second time prior to or during User Testing. The final production load will occur during production cutover.

#### Agency Responsibilities:

- Perform data mapping and conversion of data from the staging area utilizing Accela’s Extract, Translate and Load (“ETL”) toolset. This tool will confirm the accuracy of the mapping. The data mapping tool ensures that the staging to Accela conversion is accurate and prevents data from failing to convert, enforces consistency in runs, and tracks statistics.
- Perform unit testing of the conversion program including spot checks of the data within Accela staging area to identify if data corruption issues exist.
- Agency is responsible for data cleansing at source, extraction and load to staging, data transformations, data enrichment, and business rules.
- Extensive quality assurance of legacy/historical data by the Agency is required to ensure accurate transfer of data.
- Extensive business user testing to ensure converted records can be processed in the Accela system.

#### FINAL CONFERENCE ROOM CHECKPOINT

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

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

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

## DEPLOY

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

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

## TRAINING PLAN

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

Accela will develop a Train the Trainer Plan. Agency will develop end user training plan.

The Training Plan for trainers will include:

- An overview of the strategy for training for the solution.
- The training subject areas, audience, objectives, approach, and milestones.
- Definition of minimum competencies for Agency trainers and super users including approach for remediation of deficiencies related to Agency personnel skills.
- Definition of components required in individual training plans, such as course outline, schedule, etc.
- High-level training schedule for all target audiences based on the logical sequence of how the content should be delivered, availability of the participants, and deployment timing.

Accela Responsibilities:

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

Agency Responsibilities:

- Prepare end user training plan and associated content.
- Make available the appropriate Agency resources to provide required information.
- Identify users who will participate in the Train the Trainer sessions and end user sessions.
- Schedule participants and meeting locations for training sessions.

## USER ACCEPTANCE TEST (UAT) PLAN

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

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

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

- Specific resource names
- Sign-off that resources have been adequately trained to execute test cases
- A list of test cases to be executed
- Detailed schedule of their test execution plan

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

## USER ACCEPTANCE TESTING (UAT)

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

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

User Testing includes the following distinct phases:

1. Initial Test – a timeboxed phase where the Agency runs through every test Case and logs all issues in the issue tracker.
2. Issue Remediation – a time for Accela to remediate all Critical and High issues found during Initial Test, related to the Civic Application solution or tailored configuration. During this time the Accela will remediate all Critical and High issues.

3. Remediation Testing – the phase where the Agency validates that all Critical and High issues have been resolved.

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

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

|                                    |                |
|------------------------------------|----------------|
| Initial Testing                    | 4 weeks        |
| Remediation                        | 1 week         |
| Remediation Testing                | 1 week         |
| <b>Total User Testing Duration</b> | <b>6 weeks</b> |

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

Any extensions to User Testing durations will require a change order. If the Agency does not devote adequate time and staffing to User Testing to completely test the solution, Accela may opt to postpone Go-live at the Agency's expense. Accela will work diligently with the Agency to ensure this does not occur and provide several opportunities for the Agency to add additional staff and time to this effort before recommending a postponement or delay. Additionally, if out of scope items are identified throughout testing, a Change Order will be required based on the need for additional effort and/or extension of timeline.

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

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

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

Based on the UAT Duration table above, the high-level schedule of User Testing would be as follows:

- **Initial Test:** Agency to execute all User Testing test cases. During this phase, Accela will also begin resolving Critical and High defects identified throughout the testing. At the end of Initial Test, the Agency and Accela will develop and prioritize a User Testing Punch List to include open Critical and High severity implementation issues that are required for go-live, as defined in Appendix E.
  - The punch list must be finalized at the end of the Initial Test phase. Accela will export the current open Critical and High issues from the User Testing issue tracker and review this with the Agency at the close of the phase. Only in-scope issues will be considered for punch list resolution. The Remediation Phase (punch list/defect resolution) will be delayed until the Agency and Accela agree upon the punch list. At this point the defect tracker is closed.
  - If the Agency has not completed execution of all their test cases at the end of the defined duration, then an extension to the project (and Change Order) would be required.
  - **User Testing is a time-boxed activity** so it is critical the Agency identifies all issues in the Initial Test timeframe. If the Agency identifies issues AFTER the Initial Test phase (i.e., after the Punch List is agreed upon), these would be an extension to the project and a Change Order will be required.
- **Issue Remediation:** Accela will remediate, build and implement configuration updates for the User Testing Punch List (Critical and High defects).
- **Remediation Testing:** Agency will perform testing to confirm the Punch List items are resolved. This period is for retesting issues found during the initial test period. It is not for performing additional User Testing. New issues go to the parking lot. The User Testing is deemed accepted when Agency has verified the Punch List and severity of Critical and High issues have been addressed. Accepted deliverable will become the configuration code set that will be deployed to the PROD environment.

#### Output:

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

#### Accela Responsibilities:

- Support the Agency during User Testing execution, followed by remediation and retesting of Critical and High punch list issues.

#### Agency Responsibilities:

- Identify resources who will participate in User Testing.
- Ensure that testers are adequately trained on the system to accurately execute test cases.
- Lead and manage the User Testing effort, including resources and test execution schedule.
- Execute the User Testing test cases developed by the Agency during the User Testing test plan activities.
- Make available the appropriate key Agency users and content experts to participate in User Testing as defined and managed by Agency.
- Resolve Medium and Low severity defects related to tailored components.
- Determine which test cases will be used for ongoing regression testing.
- Leverage test cases as a basis for ongoing training and user guides.

### PRODUCTION CUTOVER “GO LIVE”

Production date is defined as the official date in which Accela Civic Platform moves from the test environment to production for daily Agency usage. This date will be agreed to by both Accela and the Agency at project inception. It may be altered only 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 and training, and coordination of deployment.

#### Output:

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

#### Accela Responsibilities:

- Provide support the move to Production.
- With assistance from the Agency, lead the effort to transfer the system configuration and any required data from Test to Production.
- Assist in the development of a Cutover 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 postproduction planning, execution, and monitoring.
- Assist in the development of a Cutover checklist that details the critical tasks that must be accomplished prior to moving to Production.

### POST DEPLOYMENT SUPPORT AND TRANSITION TO ACCELA SUPPORT

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

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

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

**Output:**

- Accela will provide support for **two (2) weeks** immediately following deployment (go-live).
- Accela will work with the Agency to identify and address issues identified during this period using a Post-Production Issues List. This list will be comprised of issues related to the defined deliverables listed in this SOW, which will be addressed by Accela.
- Finalized post-production copy of issues list.
- Transition of Agency from Services team to Customer Resource Center for ongoing support.

**Accela Responsibilities:**

- Provide post-production support for Accela developed configuration and components. For example:
  - Assistance with new UI or browser settings since not every user has accessed the new version of our software.
  - Issue research.
  - Escalation of issues that can't easily be resolved.
- Assist with the identification of issues for the Post-Production Issues List.
- Assist with issues that may arise related to the deliverables in this onboarding package.
- Transfer ongoing support of the Agency to the Accela Customer Support program.

**Agency Responsibilities:**

- Provide technical and functional user support for post-production support and monitoring.
- Examples of issues the Agency is responsible for include: training issues, functional changes beyond the scope of this onboarding package, cosmetic changes, and procedures related to the use of Accela Civic Platform.
- Develop and maintain a Post-Production Issues List.

### **CIVIC PLATFORM TRAIN-THE-TRAINER TRAINING**

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

**Output:**

Train-The-Trainer for End User Training

**Accela Responsibilities:**

- Coordinate with Agency and schedule the appropriate day/time to deliver the Civic Platform. Daily End User Training content outlined in the provided agenda.
- Deliver training per the specific requirements listed above.
- Provide Agency the Zoom engagement information for training.

Agency Responsibilities:

- Ensure that users have appropriate hardware/software for successfully viewing online video content.
- Staff participants have successfully read and completed the recommended online course content.

For additional trainings see Appendix H: Training.

## APPENDIX E: PROJECT RESOURCES

### AGENCY RESOURCES

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

| Agency Resources                                         | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
|----------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Project Sponsor</b>                                   | <p>Responsibilities include:</p> <ul style="list-style-type: none"> <li>• Ultimate responsibility for the success of the project</li> <li>• Creating an environment that promotes project buy-in</li> <li>• Driving the project through all levels of the agency</li> <li>• High-level oversight throughout the duration of the project</li> <li>• Serving as the primary escalation point to address project issues in a timely manner</li> </ul>                                                                                                                                                                                                                                                                                    |
| <b>Project Manager</b>                                   | <p>Agency will provide a dedicated Project Manager throughout the course of the engagement. Responsibilities include:</p> <ul style="list-style-type: none"> <li>• Overall administration, coordination, communication, and decision-making associated with the implementation</li> <li>• Planning, scheduling, and tracking the implementation with Accela and across departments within the agency</li> <li>• Primary responsibility for the coordinating and scheduling of Agency employees and facilities in support of project activities.</li> <li>• Ensuring that the project team stays focused, tasks are completed on schedule, and that the project stays on track</li> </ul>                                              |
| <b>Division/Departmental Business Leads</b>              | <p>A user representative for each affected department must be appointed to facilitate analysis and configuration and serve as a decision-making entity. These critical appointments may well determine the success of the implementation for their respective areas.</p> <p>Responsibilities include:</p> <ul style="list-style-type: none"> <li>• Attending requirements workshop sessions</li> <li>• Willing and able to gather data and make decisions about business processes</li> <li>• Assist in the creation of specifications for reports, interfaces &amp; conversions</li> <li>• Review and test the system configuration</li> <li>• Participating in the implementation of the Accela Civic Platform solution.</li> </ul> |
| <b>Division/Departmental Subject Matter Expert (SME)</b> | <p>Responsibilities include:</p> <ul style="list-style-type: none"> <li>• Being trained on the Accela system at a System Administration level</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |

|                                             |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
|---------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                             | <ul style="list-style-type: none"> <li>• Being fully engaged in the Business Analysis and system configuration activities</li> <li>• Assist internal efforts towards the creation of reports, interfaces &amp; conversions</li> <li>• Assist in the review and testing of the system configuration</li> <li>• Actively participate in the full implementation of the Accela solution.</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| <b>Integration Developer</b>                | <p>Responsibilities include:</p> <ul style="list-style-type: none"> <li>• Understanding integration needs of Agency and build designs</li> <li>• Write integration methods to meet the Agency requirements</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| <b>Report Developer</b>                     | <p>Responsibilities include:</p> <ul style="list-style-type: none"> <li>• Understanding reporting needs of Agency and build designs</li> <li>• Attend the AdHoc training</li> <li>• Write or amend reports as the Agency requirements determine</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| <b>Data Conversion Lead</b>                 | <p>Responsibilities include:</p> <ul style="list-style-type: none"> <li>• Lead efforts to cleanse the legacy data to be migrated</li> <li>• Attend Accela Data Conversion and Database Schema Training</li> <li>• Create data mappings</li> <li>• Write extraction, transformation, business rule routines to move data from legacy data source to Accela staging area</li> <li>• Perform mock data runs during the implementation and final production conversion</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| <b>Organization Change Management Agent</b> | <p>Accela does not provide Change Management services as it relates to Organizational Change Management (OCM). We support the OCM objectives by supplying technical training, content for awareness meetings, demonstrations to user groups during the project, but we find the most success for the Agency to own the OCM objectives and have a dedicated change agent with the organization.</p> <p>Responsibilities related to the Accela workstream:</p> <ul style="list-style-type: none"> <li>• Have a designated OCM representative attend the Accela analysis sessions and determine how best to align Agency operational process with technical solution workflow.</li> <li>• Access the Accela test environment to become more familiar with the solution.</li> <li>• Participate in verification of the solution and attend Conference Room Checkpoints.</li> <li>• An Accela trainer can work with the OCM representative on a plan on how the Accela end user training will be integrated with the OCM campaign.</li> </ul> |

## ACCELA RESOURCES

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

| Accela Resources                      | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
|---------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Project Executive</b>              | The Project Executive oversees the project's progress/direction and works with the Project Manager to ensure efficiency, consistency and quality in delivery of Accela implementations. The Project Executive actively participates in a project director/executive role. The Project Executive will meet with Agency Executives monthly or upon request throughout the duration of the project.                                                                                                                                                                                                                                                                                                |
| <b>Project Manager</b>                | <p>The Accela Project Manager is responsible for the overall project management and works directly with the client throughout all aspects of Accela implementations: from the initial scoping, planning, staffing to delivery. The Project Manager undertakes the project administration tasks including:</p> <ul style="list-style-type: none"> <li>• Project plan management</li> <li>• Change order management</li> <li>• Issue log management and escalation</li> <li>• Status reporting</li> <li>• Project workspace management</li> <li>• Resources management</li> <li>• Work plan management</li> <li>• Meetings management</li> <li>• Project review with Project Executive</li> </ul> |
| <b>Lead Implementation Consultant</b> | <p>The Lead Implementation Consultant assigned to the project will have major experience in the business process as well as the product functionality and is responsible for:</p> <ul style="list-style-type: none"> <li>• Business analysis activities: Mapping the client's business processes to the functionality of Accela's Civic Application products</li> <li>• Leading tailoring and configuration activities</li> <li>• Providing training/mentoring to agency staff</li> <li>• Recommend industry best practices to agency to enhance business processes</li> <li>• Guide agency on how best to configure the system based on past experiences and software expertise</li> </ul>     |
| <b>Technical Consultant(s)</b>        | <ul style="list-style-type: none"> <li>• Database Conversions and data mapping assistance</li> <li>• Interface specifications and development</li> <li>• Report definition and creation</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| <b>Training Consultant</b>            | Training Consultants are responsible for Accela Training classes with assistance from Implementation consultants, depending on the nature of the specific project.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |

## APPENDIX F: ISSUE DEFINITIONS

### ISSUE TYPES

1. **Implementation Issues** – Implementation Issues relate to elements configured or built as part of the project such as record configuration, workflow configuration, business rules/automations, custom interfaces, and reports. An issue is considered an Implementation Issue when the software is not behaving as per the approved software version (e.g., development stage complete). Data Conversion issues are considered Implementation Issues if the data was available in the proper format via the source data file but is not converted as defined in the approved Data Mapping document and as executed in the previously approved final mock run.
2. **Product Defect** – Product Defects are to errors due to unexpected behavior within the Accela Platform source code. A Product Defect cannot be resolved through configuration changes and requires a new product release or hotfix/patch.
3. **Non-Defect Issue Examples**
  - a. **Change** – Modifications or additions to the approved specification are considered changes. Examples include:
    - i. Changes to record configuration, new or changes to custom fields, changes to workflow configuration, new or changed expressions, new automation scripts, addition of business rules to existing automation script to account for previously un-documented exception cases or new requirements.
    - ii. Addressing a Product Defect or product limitation via configuration changes (implementing a work around).
    - iii. New report or change to existing report format, queries, or business logic
    - iv. New interface or new transaction for existing interface or change to existing interface business logic.
  - b. **New Requirement** – Previously undocumented business need driving additions or changes to the configuration is considered a new requirement.
  - c. **Conversion Source Data Issue** – Data cleansing issues such as data that is incomplete, erroneously formatted, or misplaced due to data errors found in the source data set often lead to undesirable or unexpected product behavior or system errors.
  - d. **3<sup>rd</sup> Party Product Issue** – Issues related to 3<sup>rd</sup> party system errors or results returned from a 3<sup>rd</sup> party system back to Accela through an interface. E.g., data in APO dataset is not up to date and causing errors in Accela or an error in the Financial system is leading to Accela transaction reconciliation problems.
  - e. **Product Enhancement** – The Accela product does not current include or support the desired feature.
  - f. **Training Issue** – The end user reported a problem that is attributed to user error
  - g. **Infrastructure Issue** – The issue is rooted in Agency infrastructure or environment settings (such as server hardware/software, network infrastructure, security software/settings, end user hardware/software).

## DEFINITION OF ISSUE, ISSUE SEVERITIES

An Implementation Issue relates to elements configured or built as part of the project such as record configuration, workflow configuration, scripts/automations, custom interfaces, and reports. An issue is considered an Implementation Issue when the software is not behaving as per the approved software version (Build stage complete). Data Conversion issues are considered Implementation Issues if the data was available in the proper format via the source data file but is not converted as defined in the approved Data Mapping document and as executed in the previously-approved final mock run.

| Severity Level | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
|----------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Critical       | <p>This is a “must fix” problem, a “showstopper.” The problem is causing a major system error, fatal error, serious database corruption, serious degradation in performance, major feature malfunction, or is preventing a major business goal from being realized. The problem does not have a workaround that is reasonably acceptable to the corresponding end-users.</p> <p>Examples:</p> <ol style="list-style-type: none"> <li>1. The Address, Parcel, Owner search is not returning any results which means an Applicant or Staff cannot submit a record because the Parcel is required and requires validation with the Agency’s GIS system</li> <li>2. An error is displaying when trying to select the submit button during Intake which is preventing the Record from being created. The error message is not providing any direction to the user other than contact your system administrator.</li> <li>3. The Payment Interface is down which would not allow the online records from being created and the back-office staff would not be able to proceed with workflow due to business rules preventing the advance of workflow if there are outstanding fee due.</li> </ol>                                                                                                                                                                                                                                                                                                                                                                                                             |
| High           | <p>This is a problem that is causing significant loss of feature functionality, but the system can recover from the problem and it does not cause total collapse of the system. The system does not meet a business goal or a portion of a business goal; performance degradation is minor, but not within established exit criteria; or minor database issues may exist (e.g., single rows or fields may be locked). The problem does have a workaround that is reasonably acceptable to the corresponding end-users.</p> <p>Examples:</p> <ol style="list-style-type: none"> <li>1. Fees are wrongly being applied to records based on business rules or configuration. The workaround would require business rules (scripts) to be disabled and staff would manually apply fees or staff voiding fees or refunding fees if duplication is occurring.</li> <li>2. Notification going to citizens where the URL for the online portal, the Record ID, Decision, or attachments are missing. The workaround, Staff would take more calls around the notification received by the citizen.</li> <li>3. Notification being sent to an incorrect contact on the record. The workaround, Staff would take more calls around the notification received by the citizen.</li> <li>4. Incorrectly activating a workflow task status, for example where the task was not activated or based on business rules closing the workflow task. The workaround, Supervisor would need to override the workflow task status to activate the correct workflow task to proceed with the application life cycle.</li> </ol> |

|        |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
|--------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|        | <ol style="list-style-type: none"> <li>Workflow assignment is either not assigning to the correct department or is not assigning to a department (i.e. department would be blank). The workaround, Supervisors or Managers would need to use the Unassigned Reviews report for workflow assignment.</li> <li>A Notification going to one of the contacts identified as recipient, but not all (for example going to the Applicant, but not the Owner). The workaround, Staff would take more calls around the notification not received by the citizen</li> </ol>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| Medium | <p>This is a problem that is causing minor loss of feature functionality. Optional workarounds are acceptable but causing significant efficiency loss. Problem is cosmetic, but public facing and deemed go-live critical.</p> <p>Examples:</p> <ol style="list-style-type: none"> <li>Notification going to citizens where Assigned Reviewer, Address, or Contact Types is missing. The workaround, Staff would take more calls around the notification received by the citizen.</li> <li>Notification going to one of the contacts identified as recipient, but not all (for example going to the Applicant, but not the Owner). MUST be going to Applicant to be considered medium. The workaround, Staff would take more calls around the notification not received by the citizen.</li> <li>Workflow assignment for the round-robin is incorrectly assigning staff users. The workaround, Staff assigned to the record would need to re-assign the workflow to the appropriate Staff</li> <li>Incorrectly setting due dates in the workflow based on defined business rules. The workaround, Staff would need to manually set the due date.</li> <li>Required element such as document types, contacts, or custom fields are allowing the user to proceed w/out having met the requirement. The workaround, Staff would need to validate all required elements and if one was missing use the workflow task status of "Additional Information Required" to have the user provide the required information to proceed with the application process.</li> </ol> |
| Low    | <p>This is a problem that is causing minor loss of feature functionality. Optional workarounds reasonably acceptable to the corresponding end-users are available with minor efficiency loss. Minor issues, misspellings, cosmetic changes, etc.</p> <p>Examples:</p> <ol style="list-style-type: none"> <li>Misspellings on instructions, data elements, report content, or notifications content.</li> <li>Font inconsistencies, if data elements or online portal language is written in different fonts in different sections.</li> <li>Inconsistency with Console configuration between departments, for example the record selection where there is the drop down rather than the decision tree or constraint within the defined filter is not displaying the entire defined criteria.</li> </ol>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |

## APPENDIX G: DATA CONVERSION APPROACH

### OVERVIEW

One of the most challenging aspects of the implementation of a new software system is the data conversion. The legacy system will have features and functions not found in the new system, maintains the data differently than the new system, and the overall user experience will not be the same. The data conversion process will take the data from the legacy system and extract it in a manner that will be useable for the new system. The extraction process is a very iterative process and requires the agency to have staff who are familiar with the legacy system in order to be successful.

The Accela Civic Platform data conversion strategy is a very iterative and agile process that requires all parties to be flexible. To guide the agency in this effort, an Accela data conversion specialist will:

- Lead a data conversion training session
- Provide data requirements
- Provide a means for the agency to review the data in a conversion environment at the end of the session.

The below sections will outline the different aspects of the data migration and provide the specific tasks for each session. Specific content of each session may vary based on the individual needs of the conversion.

### DATA CONVERSION STRATEGY

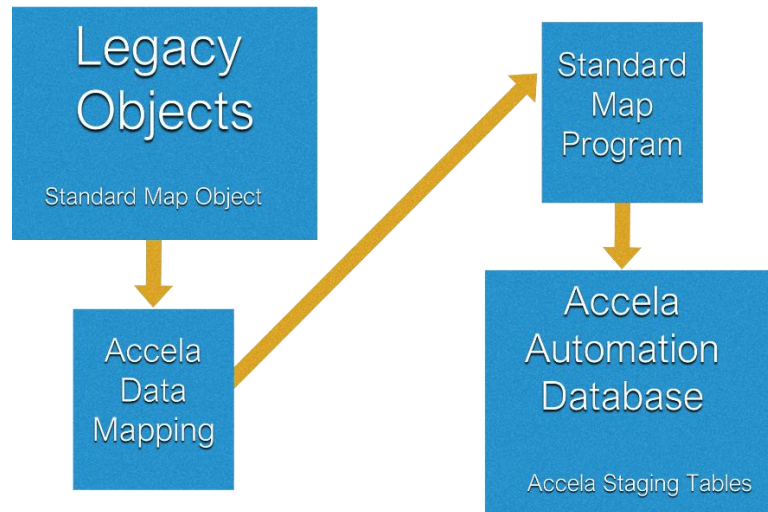
#### TERMINOLOGY

| Term                             | Description                                                                                                                                                                                        |
|----------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Standard Map Objects             | Standard legacy side database objects, i.e. tables and views.                                                                                                                                      |
| Legacy Objects                   | Includes the legacy database objects and the standard map objects.                                                                                                                                 |
| Standard Map Program             | A set of ETL (extract, transform, load) executables that incorporates the crosswalks created in the Accela Data Mapping tool and moves the data to the Accela Automation database                  |
| Standard History Program         | Moves the data from the standard history staging table into the Accela Automation structure.                                                                                                       |
| Accela Data Mapping Tool         | A program that utilizes the standard map views that creates the cross walks for data translation. Some of the translation tables are: Record types, Record status, Inspections, Workflow and Fees. |
| Data Source                      | A single database table and the associated tables that are used to process the record.                                                                                                             |
| Extraction Process or Extraction | The process by which the data is pulled out of the legacy data structure and loaded into the standard map objects.                                                                                 |

#### PROCESS FLOW

The diagram below illustrates the process for a standard data conversion with one data source. Agency staff will only be required to be familiar with the legacy side (which is the left side of the diagram below). With assistance and guidance from Accela staff, the Agency will be required to extract the data out of the

legacy structure and put the data into the standard map tables. This requirement for the Agency is critical as they have the knowledge and understanding of the legacy system.



## SESSION 1

This work effort will first identify how the legacy record types will be translated into the Accela Civic Platform record types. This is the most important task as there are many subsequent tasks in the process that are dependent on getting this initial effort correct. The table below provides a high-level overview of each task. The duration of the cycle is approximately forty business days depending on the availability of the agency staff and their knowledge of the legacy system. This time estimate is based on at participation of at least **two (2)** knowledgeable resources from the Agency. These resources should have in-depth knowledge of the legacy system and be able to make decisions about the data that needs to be preserved for business functions in the future system.

| Seq | Task                                                          | Responsible Party | Comments                                                                                                                                                                                                 |
|-----|---------------------------------------------------------------|-------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1   | Training overview                                             | Accela            | Training and assignment of tasks for this group.                                                                                                                                                         |
| 2   | Extraction of the base record                                 | Agency            | Base record extraction, which includes but is not limited to: Application Number, Application Date, Record Status and Record Type from the legacy system                                                 |
| 3   | Identification of the legacy attributes for the custom fields | Agency/Accela     | Accela will provide an excel workbook with the custom fields for the current records types. Agency will map out the data and provide any translation rules.                                              |
| 4   | Extraction for the address and parcel                         | Agency            | Identify parcel information on the record and identify the address elements. Agency may need to parse the address record/translate data like street direction, street suffix and other similar elements. |

|    |                                                 |               |                                                                                                                                                                          |
|----|-------------------------------------------------|---------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 5  | Extraction of the application comments          | Agency        | General application comments.<br>Note: These are not comments for Inspections, Payments, or other related data types.                                                    |
| 6  | Extraction of related records                   | Agency        | This is the extraction of the Parent/Child relation between applications in the legacy system.                                                                           |
| 7  | Extraction of people associated with the record | Agency        | This is for the Contacts, Licensed Professionals, and Property Owners.                                                                                                   |
| 8  | Extraction of basic workflow data               | Agency        | This is for the Issued Date and Closed Date of the application.                                                                                                          |
| 9  | Extraction of the application status            | Agency        | This is the historical status information associated to the record.                                                                                                      |
| 10 | Extraction of activities                        | Agency        | Activities associated to the record, e.g. phone calls, general notes and other similar types of data.<br>Note: This data is not always found in the legacy system.       |
| 11 | Creation of crosswalk                           | Agency/Accela | Using the Accela data mapping tool, create the cross walks for the appropriate data elements including: Record type, Record status, Contacts and Licensed Professionals. |
| 12 | Load the above data                             | Accela        | Load data provided into the conversion environment                                                                                                                       |
| 13 | Review of data                                  | Agency        | Verify that the data loaded correctly. Alert Accela team of any items that did not convert correctly.                                                                    |

Once the above activities are completed, the Agency will provide a copy of the database that has the standard map tables to the Accela conversion team for upload into the conversion environment. The data should be reviewed by the Agency's staff who created the extraction logic.

## SESSION 2

The second session focuses on inspections and the associated checklist and conditions. In addition, the scripting of the custom fields and custom lists will be covered during this session. At least two Agency resources should work on custom field and custom list scripting tasks. One resource will complete the tasks listed below except for the task for custom fields and custom lists.

| Seq | Task                                                            | Responsible Party | Comments                                                                                    |
|-----|-----------------------------------------------------------------|-------------------|---------------------------------------------------------------------------------------------|
| 1   | Training on the below activities                                | Accela            | Overview of the data to be migrated in this session.                                        |
| 2   | Creation of the custom fields and custom list migration process | Accela/Agency     | Either party can do this task. If Accela does the work, this would impact the overall cost. |
| 3   | Extraction of the inspections                                   | Agency            | Extraction of the inspection data for the given record types.                               |
| 4   | Guide Sheets                                                    | Agency            | Guide Sheet or Checklist associated to the individual inspection record.                    |
| 5   | Conditions/Condition of Approval                                | Agency            | When Applicable                                                                             |

|   |                                                            |               |                                                                                                       |
|---|------------------------------------------------------------|---------------|-------------------------------------------------------------------------------------------------------|
| 6 | Mapping of the inspections in the Accela Data Mapping Tool | Agency/Accela | Creation of the crosswalks for the inspection types and inspection statuses.                          |
| 7 | Provide backup of the legacy database                      | Agency        | Agency provides backup of the legacy database.                                                        |
| 8 | Load the data                                              | Accela        | Load the data into the conversion environment.                                                        |
| 9 | Review of the above data elements                          | Agency        | Verify that the data loaded correctly. Alert Accela team of any items that did not convert correctly. |

### SESSION 3

Session 3 outlines the requirements for the migration of fees and payments. A single resource is sufficient to complete these tasks.

| Seq | Task                                     | Responsible Party | Comments                                                                                              |
|-----|------------------------------------------|-------------------|-------------------------------------------------------------------------------------------------------|
| 1   | Training for below activities            | Accela            | Provide requirements for the migration of fees and payments                                           |
| 2   | Extraction of the fees                   | Agency            | Extract legacy fee data.                                                                              |
| 3   | Extraction of the payments               | Agency            | Extract legacy fee data.                                                                              |
| 4   | Map fees in the Accela Data Mapping Tool | Agency            | Create the cross walk of old fee codes to the new fee codes.                                          |
| 5   | Load the data                            | Accela            | Load the data into the conversion environment                                                         |
| 6   | Provide backup of legacy database        | Agency            | Agency provides backup of the legacy database.                                                        |
| 7   | Review the data                          | Agency            | Verify that the data loaded correctly. Alert Accela team of any items that did not convert correctly. |

### SESSION 4

This session will cover the remaining items for workflow as well as the migration of the custom fields. This session will require two (2) resources: One to complete the workflow mapping and scripting while the other resource is going back over the issues found in the prior data loads to determine the resolution.

| Seq | Task                                                                   | Responsible Party | Comments                                                                                                                             |
|-----|------------------------------------------------------------------------|-------------------|--------------------------------------------------------------------------------------------------------------------------------------|
| 1   | Training on the below activities                                       | Accela            | Overview of the data to be migrated in this session                                                                                  |
| 2   | Extraction of additional workflow data                                 | Agency            | Extract additional data from the legacy system.                                                                                      |
| 3   | Map legacy workflow tasks and statuses in the Accela Data Mapping Tool | Agency            | Earlier Sessions the Issued Date/Completion Date was determined. Any additional data for the workflow will be captured in this task. |
| 4   | Provide backup of the legacy database                                  | Agency            | Creation of the crosswalks.                                                                                                          |
| 5   | Load workflow                                                          | Accela            | Migration task for workflow into the conversion environment.                                                                         |

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|   |                    |                 |                                                                                  |
|---|--------------------|-----------------|----------------------------------------------------------------------------------|
| 6 | Load Custom fields | Accela          | Loading of the custom fields and custom list.                                    |
| 7 | Review of the data | Agency / Accela | Verify all major data elements are now loaded. Notify Accela team of any issues. |

## FINAL STEPS

Once the four sessions have been completed, the data is reviewed and issues are recorded in the SharePoint Data Conversion Issue Tracker. At this point in the data migration life cycle, we address any remaining issues such as resolution of mapping issues in the Accela Data Mapping Tool, issue resolution and migration of any additional custom fields and custom lists. The Accela conversion specialist and the Agency technical staff who created the migration scripts will meet and discuss the remaining work and report out to the project managers their findings. In most cases the remaining work is limited to performing additional unit testing, issue resolution and identifying and loading missing data elements.

## APPENDIX H: TRAINING

Accela will provide the following standard training courses for the project.

|                                                                            |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
|----------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Civic Platform 1: Core Team Training (2 day)</b>                        | <b>COURSE SUMMARY:</b> This course is an overview of the Accela Civic Platform, to help you become familiar with the basic terminology, system navigation, and core functionality of the platform. You'll learn Accela best practices. You'll explore design concepts, advanced configuration options, and automation possibilities.                                                                                                                                                                                                                                                                                                                                                  |
| <b>Civic Platform 2: System Admin Usage (3 day)</b>                        | <b>COURSE SUMMARY:</b> This course is designed to prepare you to take over managing your instance of Civic Platform following implementation. You will dive deeper into user experience design concepts and configuration options. You will learn how to create different record types. You'll study business analysis and process design. You'll build workflows with custom fields. You will design page forms, layouts, and learn how to develop and utilize expressions. You will explore user security and permissions.                                                                                                                                                          |
| <b>Civic Platform 10: Citizen Access - System Admin (1 day)</b>            | <b>COURSE SUMMARY:</b> This course focuses on implementing web strategies for citizen access and usage. You will learn to manage the look and feel of your site with CSS or the Brand Builder tool, turn on and off functionality, and edit your Citizen Access web pages, links and buttons. You'll learn how to create record page flows and deploy custom components. You'll explore management strategies for public user accounts and contact relationships. You'll also learn how to establish module-specific security, visibility, and access settings. This course will prepare you for implementing and managing the content, look and feel of your online citizen portals. |
| <b>Civic Platform 9: GIS Administration (4 hours)</b>                      | <b>COURSE SUMMARY:</b> This course is designed to help you use the GIS Admin tool for setup and connection to your existing map service. You will learn to create map integrations, and build map profiles by configuring map, geocoding and routing services. You'll also learn how to manage map settings, control map security and access, and create map user groups. Finally, you will learn to configure Accela Automation and Citizen Access integrations. This course will provide the skills you need to take full advantage of Accela's GIS Admin tool.                                                                                                                     |
| <b>Civic Platform 10: Mobile Office (6 hours)</b>                          | <b>COURSE SUMMARY:</b> The course is recommended to prepare you for implementing Mobile Office in your instance of Civic Platform. You will learn how to access job lists and records in the field and create new records in the field. You'll learn how to create, schedule, reschedule, cancel and reassign inspections. You'll learn how to establish settings for offline and online inspections. Finally, you will learn how to search records and inspections by creating and applying filters. This course will enable you to take full advantage of Accela Mobile Office.                                                                                                     |
| <b>Civic Platform 14: Ad Hoc Reporting (1 day)</b>                         | <b>COURSE SUMMARY:</b> This course is designed to prepare you to use reporting in the Civic Platform. You will learn how to use report tools to design and develop reports and create sub-reports. You'll learn to deploy reports in hundreds of places throughout the Civic Platform and ACA. You will practice creating expressions to concatenate or calculate at the field level. You'll also use the form designer to create forms and letters. This course provides practical knowledge in real use report setup using the Ad-Hoc Reporting tool.                                                                                                                               |
| <b>Civic Platform 17: Train the Trainer (2 days plus independent work)</b> | <b>COURSE SUMMARY:</b><br>This Civic Platform course is intended to prepare identified customer trainers to train their end users. As a Customer Trainer, you will first review the basic 2-day end user course around the customer daily Automation processes. You will then engage in workshop practice sessions where you will teach the Accela instructor and other participants sections of the 2-day end user course. Feedback will be given to help you obtain the skills needed to effectively train your end users. By the end of this course you will have ability to train your end users in Civic Platform.                                                               |



## **ATTACHMENT C**

### **Campaign Contribution Disclosure (SB 1439)**

#### **DEFINITIONS**

**Actively supporting the matter:** (a) Communicate directly with a member of the Board of Supervisors or other County elected officer [Sheriff, Assessor-Recorder-Clerk, District Attorney, Auditor-Controller/Treasurer/Tax Collector] for the purpose of influencing the decision on the matter; or (b) testifies or makes an oral statement before the County in a proceeding on the matter for the purpose of influencing the County's decision on the matter; or (c) communicates with County employees, for the purpose of influencing the County's decision on the matter; or (d) when the person/company's agent lobbies in person, testifies in person or otherwise communicates with the Board or County employees for purposes of influencing the County's decision in a matter.

**Agent:** A third-party individual or firm who, for compensation, is representing a party or a participant in the matter submitted to the Board of Supervisors. If an agent is an employee or member of a third-party law, architectural, engineering or consulting firm, or a similar entity, both the entity and the individual are considered agents.

**Otherwise related entity:** An otherwise related entity is any for-profit organization/company which does not have a parent-subsidary relationship but meets one of the following criteria:

- (1) One business entity has a controlling ownership interest in the other business entity;
- (2) there is shared management and control between the entities; or
- (3) a controlling owner (50% or greater interest as a shareholder or as a general partner) in one entity also is a controlling owner in the other entity.

For purposes of (2), "shared management and control" can be found when the same person or substantially the same persons own and manage the two entities; there are common or commingled funds or assets; the business entities share the use of the same offices or employees, or otherwise share activities, resources or personnel on a regular basis; or there is otherwise a regular and close working relationship between the entities.

**Parent-Subsidiary Relationship:** A parent-subsidiary relationship exists when one corporation has more than 50 percent of the voting power of another corporation.

**Contractors must respond to the questions on the following page. If a question does not apply respond N/A or Not Applicable.**

1. Name of Contractor: ACCELA, INC.
2. Is the entity listed in Question No.1 a nonprofit organization under Internal Revenue Code section 501(c)(3)? Yes ☐ If yes, skip Question Nos. 3-4 and go to Question No. 5 No ☒
3. Name of Principal (i.e., CEO/President) of entity listed in Question No. 1, if the individual actively supports the matter and has a financial interest in the decision: NOAM REININGER
4. If the entity identified in Question No.1 is a corporation held by 35 or less shareholders, and not publicly traded ("closed corporation"), identify the major shareholder(s): ACCL BUYER, L.P.
5. Name of any parent, subsidiary, or otherwise related entity for the entity listed in Question No. 1 (see definitions above):

| Company Name     | Relationship |
|------------------|--------------|
| ACCL BUYER, L.P. | PARENT       |
|                  |              |

6. Name of agent(s) of Contractor:

| Company Name | Agent(s) | Date Agent Retained<br>(if less than 12 months prior) |
|--------------|----------|-------------------------------------------------------|
| N/A          |          |                                                       |
|              |          |                                                       |

7. Name of Subcontractor(s) (including Principal and Agent(s)) that will be providing services/work under the awarded contract if the subcontractor (1) actively supports the matter and (2) has a financial interest in the decision and (3) will be possibly identified in the contract with the County or board governed special district.

| Company Name | Subcontractor(s):        | Principal and/or Agent(s): |
|--------------|--------------------------|----------------------------|
|              | DJCC, LLC                | Donald Schier              |
|              | FortyTwo Solutions, Inc. | Fouad Ishac                |
|              | Unique Comp Inc.         | Anish Mirza                |

8. Name of any known individuals/companies who are not listed in Questions 1-7, but who may (1) actively support or oppose the matter submitted to the Board and (2) have a financial interest in the outcome of the decision:

| Company Name | Individual(s) Name |
|--------------|--------------------|
| N/A          |                    |
|              |                    |

Revised 2/8/24

9. Was a campaign contribution, of more than \$250, made to any member of the San Bernardino County Board of Supervisors or other County elected officer within the prior 12 months, by any of the individuals or entities listed in Question Nos. 1-8?

No ☒ If **no**, please skip Question No. 10.

Yes ☐ If **yes**, please continue to complete this form.

10. Name of Board of Supervisor Member or other County elected officer: N/A

Name of Contributor: N/A

Date(s) of Contribution(s): N/A

Amount(s): N/A

Please add an additional sheet(s) to identify additional Board Members or other County elected officers to whom anyone listed made campaign contributions.

By signing the Contract, Contractor certifies that the statements made herein are true and correct. Contractor understands that the individuals and entities listed in Question Nos. 1-8 are prohibited from making campaign contributions of more than \$250 to any member of the Board of Supervisors or other County elected officer while award of this Contract is being considered and for 12 months after a final decision by the County.

Revised 2/8/24