

Statement of Work

Fresno County, CA

1/27/2026

Version 1.0

Accela, Inc.
9110 Alcosta Blvd
Suite H #3030
San Ramon, CA 94583
Tel: 925-659-3200

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DOCUMENT CONTROL

Date	Author	Version	Change Reference
1/26/2026	Jeffrey Taylor	1.0	

INTRODUCTION

This Statement of Work (“SOW”) dated as of the last date of signature below sets forth the scope and definition of the project-based professional services (collectively, the “Professional Services”) to be provided by Accela, Inc. and Fresno County, CA (“Agency” or “Customer”).

This SOW is issued pursuant to and governed by the terms and conditions of the Accela Consulting Services Policy found at www.accela.com/terms (the “Agreement”).

In the event of a conflict between the SOW and the Agreement, the terms of the SOW shall prevail as to pricing, delivery dates, and description of the applicable Professional Services but will not prevail over, modify, or terminate any surviving provision of the Agreement. This SOW is effective as of the date that the SOW was last signed by the Customer and Accela (“SOW Effective Date”).

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

EXECUTIVE SUMMARY

This document captures the configurations Customer will receive and provides visibility into how Accela will perform the implementation/migration/configuration of your solution according to the below terms.

Implementation of a Code Enforcement solution in response to an RFP by the County of Fresno, CA.

SOLUTION OVERVIEW

Your solution includes the following SaaS products:

- Civic Application Solutions
 - Code Enforcement
- Accela Citizen Access (ACA) Public Portal
- Accela Mobile
- Accela GIS
- Construct API

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

- Payments Processor

PROJECT METHODOLOGY

Accela’s Professional 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 service is delivered in one release broken down into four stages (Define, Refine, Develop and Deploy) resulting in the Agency’s production use of the solution.

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

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

Stage Title	Stage Overview	Activities and Artifacts
Stage 1: Define	The Define stage sets the framework for how the project will be managed throughout the project life cycle.	<ul style="list-style-type: none"> • Project Schedule • Project Management Plan • Project Kickoff • Solution Provisioning
Stage 2: Refine	The Refine stage begins the knowledge transfer of the Agency’s Accela Civic Platform solution and promotes adoption of the new system. This stage completes the Agency-specific tailoring of the configuration.	<ul style="list-style-type: none"> • Core Team Training • Tailoring Sessions • Review and Verification testing • Conference Room Checkpoints • Integration Designs • Data Conversion Kickoff
Stage 3: Develop	The Develop stage builds upon the tailored solution from the Refine Stage adding automation, custom reports, integrations, and running the data conversion efforts. The result of this stage is a fully built solution ready for deployment.	<ul style="list-style-type: none"> • Business Automation Configuration • Custom Report development • Integration development • Data Conversion mock runs • Review and Verification testing • Conference Room Checkpoints
Stage 4: Deploy	After all development work has been completed, the system is ready for User Acceptance Testing (UAT) and End User Training. The final data conversion and cutover activities support Go-Live.	<ul style="list-style-type: none"> • Training Plan • Test Plan and Test Cases • User Acceptance Testing • End User Training • Final extract for production • Final conversion load into Production • Go Live Support and Transition to Accela Customer Support

GOVERNING PRINCIPLES

For Accela and the Agency to successfully perform the onboarding described herein, there are several critical success factors that must be closely monitored and managed by the Accela and Agency

stakeholders. These factors are critical in setting expectations between the Agency and Accela, identifying and monitoring risks, and promoting strong communication:

- **Clear Business Objectives** – The Customer has clearly documented their business objectives before the commencement of onboarding and shared those objectives with Accela.
- **Accept Civic Application Solution(s)** – The Customer acknowledges that a standard Civic Application package solution will provide end-to-end processing of an application or permit solution and may require some modifications to how the Customer conducts business today. Customer staff supporting the tailoring sessions should have an open mind to accept these standard solutions based on Accela’s many years of applying best practices to the implementation process. These solutions will allow for online processing, attaching documents, processing the application via a workflow, sending notifications based on workflow status, accepting payment, allowing to capture standard comments, and if required trigger inspections. The solutions will allow the Customer to process their applications and/or permits.
- **Agency-specific Tailoring Inputs Identified and Documented** – The Customer has documented and has a clear understanding of their processes to enable the Accela team to perform solution tailoring. For example, the Customer must have a clear understanding on how fees are calculated to support the solution. If there is an expectation that the Customer’s business processes expand the scope of the solution, Accela will raise this risk to the Customer prior to proceeding.
- **Dedicated Agency Participation** – Agency acknowledges and agrees, throughout the duration of the Professional 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 involentvement. 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 it is willing to adhere to and will adopt Accela’s implementation methodology. Please see [Appendix D](#) for a full description of the Accela implementation methodology.
- **Knowledge Transfer** – Agency personnel must participate in all the implementation stages and activities for Accela to transfer knowledge to the Agency. Once Post-Production transition tasks are completed by Accela, Agency personnel will assume all day-to-day business operation of the solution.

ADMINISTRATION

PROJECT TIMELINE

The project is estimated to take **4 months**. The projected start date for the Project is forty-five (45) calendar days after mutual acceptance and signature of this SOW. A detailed schedule will be developed during the Define stage in collaboration with Accela and Agency Project Manager. If Agency 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.

Notwithstanding anything to the contrary, upon completion of the work defined in this SOW, this SOW will expire.

The table below shows an estimated high-level timeline.

Month 1	Define Stage
Month 2	Refine Stage
Month 3	Develop Stage
Month 4	Deploy Stage

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

PROJECTS PUT ON HOLD 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, Accela reserves the right to terminate the SOW 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 SOW at the time of the delay. After that time, Accela can choose to cancel the rest of the SOW. To finish the project will require a new SOW at new pricing at the standard rates.

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 SOW. To finish the project will require a new SOW at new pricing at the standard rates.

PAYMENT TERMS

Accela will perform the Professional Services on a monthly progress payment basis. The Fixed-Fee price is based on the information available at the time of signing and the assumptions, dependencies and constraints, and roles and responsibilities of the Parties, as stated in this SOW. Invoices will be sent out monthly.

Monthly Progress Payments	Price
Month 1	\$ 70,541.25
Month 2	\$ 70,541.25
Month 3	\$ 70,541.25
Month 4	\$ 70,541.25
TOTAL PROFESSIONAL SERVICES COST	\$ 282,165.00
TOTAL TRAVEL EXPENSES	\$ 0.00
GRAND TOTAL	\$ 282,165.00

EXPENSES

There is no provision for travel expenses or travel time in this SOW because Agency does not need any onsite resources. Travel to the Agency will not be conducted unless a Change Order, inclusive of travel expense terms and conditions, is signed prior to travel commencing to cover the cost of the travel.

CONTRACT SUM

The total amount payable under this SOW, is \$282,165.00. 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 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 Professional 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, based on the standard rate for Accela resources of \$250 per hour. Accela will continue performing the Professional Services in accordance with the SOW until the parties agree in writing on the change in scope of work, scheduling, and fees. If Accela's effort changes, such as changes to the baseline schedule, roles, responsibilities, assumptions, or scope, or if additional support hours are required, a Change Order will be created that details these changes and impact to project and cost (if any). Any Change Order must be agreed to by Accela and Agency prior to commencing any activities defined in the Change Order.

EXPIRATION

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

DISCLAIMERS

Accela makes no warranties in respect of its Professional 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 Professional Services, Products, and maintenance and support, as set out the agreement between Accela and Agency, does not extend outside the Supported Modifications or to any Agency manipulation of implemented scripts, reports, integrations and 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 Professional 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 test cases are not in scope of Accela Professional Services.
- Development of custom training materials are not in scope of Accela Professional Services
- Scope of the Project is based on discovery sessions with Agency prior to the SOW development.
- Any additional worked hours over the hours or scope stated in the SOW will require a Change Order.
- Pre-existing defects will not be in this scope unless specifically identified.

PROJECT RESOURCING ASSUMPTIONS

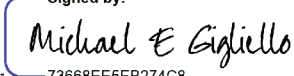
- Resources expected by the Agency and Accela are listed in Appendix E.
- Accela personnel will attend Agency executive steering committee meetings, either in-person or remotely.
- In the pricing, Accela has assumed the appropriate resourcing to ensure success for the scope outlined. Additional support 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 Professional 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 and network access to and connectivity with all systems, networks, and data as necessary to perform the project. Agency will also provide necessary security badges, parking passes as required.

ACCELA TECHNICAL ASSUMPTIONS

- Custom payment adapters will be hosted by the Agency.
- Technical Specification documents will not be produced for any standard integrations, such as GIS, Single Sign-On (SSO), and standard payment adapters. 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.
- Agency is responsible for providing all third-party end user training and third-party training for Accela staff.
- Accela will host the source code repository which is integrated with the Accela Civic Platform. If the customer has an existing code repository, the Accela repository will be the master (source of truth) until project completion.
- Agency must provide a Contact for all third-party systems, to be available for collaboration.
- Agency is responsible for hosting any integrations.
- Agency is responsible for obtaining a code source repository prior to go-live, to maintain custom scripting code.

SIGNATURES

This SOW 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.

ACCELA, INC Signed by:  73668EE5EB274C8... <i>Authorized Signature</i>
Michael E Gigliello
<i>Name – Type or Print</i>
Controller
<i>Title</i>
Apr-13-2026
<i>Date</i>

Fresno County, CA

<i>Authorized Signature</i>
Garry Bredefeld

<i>Name – Type or Print</i>
Chairman of the Board of Supervisors of the County of Fresno

<i>Title</i>
May 12, 2026

<i>Date</i>

Attest:
BERNICE E SEIDEL
Clerk of the Board of Supervisors
County of Fresno, State of California
By _____ Deputy

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)	Solution Type
1	Code Enforcement	Civic App

APPENDIX B: TAILORING FRAMEWORK

Accela will perform the tailoring identified below based on the record types listed in [Appendix A](#) Solution Inventory. Any scope requested outside of this framework are subject to a Change Order.

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

RECORD GROUPINGS

The project assumes a total of 1 record grouping. The record group will move through a 4 to 6 week tailoring process comprised of these high-level activities:

- One (1) week of Tailoring Sessions (two weeks for custom)
- One (1) week to tailor the configuration based on information collected in the sessions (two weeks for custom)
- One (1) week Agency validation of the configured solution
- One (1) week to finalize configuration and conduct Conference Room Checkpoint

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

TAILORING COMPONENTS

Record-level

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

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

- **Document Types** – Applicant, Licensed Professionals, Authorized Agent, and Agency Staff can upload documents associated to a permit application.
- **ACA** – For each Civic Application record in the Solution Inventory, a pre-defined series of pages to submit the application online (i.e., the record’s pageflow) is included. Each page in a pageflow can have its own instructional text. Accela will update up to ten (10) instances of page-level instructional text and will train the Agency to update and maintain any further instructional text.
- **Custom Records** – For the processes in [Appendix A](#) that are marked “Custom”, Accela will clone an existing process where possible, and tailor the components above for each custom record. These updates must be completed and validated within the time-boxed tailoring process.

System-level

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

1. Building Amendment

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

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

CONFIGURING CASHIERING

Accela will configure Cashiering with the following functionality:

- Setup initial fee schedules
- Associate up to three (3) General Ledger accounts to the fee item
- The ability to assess, invoice, and void fees based on user permissions

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.

CITIZEN ACCESS CONFIGURATION

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

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

The following use cases are included in the subscribed solution:

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

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

- Changing items in the cart

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

STANDARD REPORT BRANDING

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

ACCELA DOCUMENT SERVICES

Accela will configure use of Accela Document Services (ADS) for the Agency’s document storage within the Accela Civic Platform.

ACCELA MOBILE CONFIGURATION

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

ACCELA GIS CONFIGURATION

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

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

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

The following will be executed for this task:

- Configuration of map services within Accela GIS
- Configuration of xAPO
- Setup of 2 Proximity Alerts (EMSE script)
- Setup of 5 Attribute Mappings to Record Custom Fields

USER ACCEPTANCE TESTING (UAT)

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

Initial Testing	1 week
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Remediation	1 week
Remediation Testing	1 week
Total User Testing Duration	3 weeks

Additional details may be found under the User Acceptance Testing section of [Appendix D: Accela Methodology](#).

POST GO-LIVE SUPPORT

Accela will provide **four (2) weeks** of post-production support to the Agency before transitioning support to Accela Customer Support. Additional details may be found under the Post Go Live Support and Transition to Customer Support section of [Appendix D: Accela Methodology](#).

TRAINING COURSES

Accela will provide the following standard training courses for the project. . Accela University training seats are made available to 2-4 members of agency staff directly responsible for the configuration and maintenance of the related subject. Accela does not provide unlimited seat access to the training events.

Training	Description
Core Team Training Delivered by Professional Services	This course is an overview of the Accela Civic Platform to help agency personnel become familiar with the basic terminology, system navigation, and core functionality of the Civic Platform. Attendees will learn the Civic Platform best practices, explore design concepts, learn of advanced configuration and automation options. It is recommended this course be taken prior to the analysis and system requirement gathering sessions with Accela Consulting personnel.
Civic Platform Records and Mobile Administration Provided by Accela University	This course prepares agency administrators to build and maintain all facets of record type configuration within the Civic Platform. Administrators will learn basic and advanced configuration options for associated record components and be able to successfully build fully functioning record types from setup to deployment in the Civic Platform, Citizen Access and Accela Mobile per agency business requirements.
Civic Platform User Experience Administration Provided by Accela University	This course prepares agency administrators to configure and maintain the user experience for the Civic Platform. You will learn how to control page and form visibility at agency, module, group, and user levels. You will be able to modify current pages and forms in the system, and deploy new pages, forms, and fields. You will learn to design consoles for group-specific customization and create appropriate data filters for records or tasks at the appropriate effect scope. You will be able to design custom field layouts for all enabled forms or records and employ expressions to further enhance user experience.
Citizen Access Administration Provided by Accela University	This course prepares agency administrators to configure and maintain Citizen Access for your agency. You will learn how and when to use the Citizen Access administrator tools to manage global, feature, registration, and module specific settings. You will learn how to control public user access to different types of data based on role permissions. You will be able to deploy records and create page flows for customers to submit applications online as well as schedule or request inspections. Participants will also learn how to edit all Citizen Access pages and use Brand Builder to manage the look and feel of the site.
GIS Administration	This course is designed to prepare agency administrators to configure and maintain Accela JavaScript GIS maps in the Civic Platform and Citizen Access. You will learn to use the GIS Admin tool for setup and connection to your existing map service. You will be able to build map profiles consisting of map services, geocoding, routing, and custom base maps. You will learn

<p>Provided by Accela University</p>	<p>to create AA and ACA integrations and customize your map users experience with map groups. You will be able to setup and configure optional items such as XAPO, Dynamic Themes, Custom Widgets, and Hotlinks.</p>
<p>SSRS Reports</p> <p>Provided by Accela University</p>	<p>Participants will receive instruction in designing reports, connecting to custom data, creating custom formulas, and accepting user input through parameters. Additionally, participants will receive instruction in creating reports to show workflow, workflow history, associated people, and related record information. Finally, the training will conclude with instruction in the creation of a report showing the results of an inspection. The report will show details of inspection results, guide-sheet, and guide-sheet items associated with the inspection.</p>
<p>Crystal Reports</p> <p>Provided by Accela University</p>	<p>Participants will receive instruction in designing reports, connecting to custom data, creating custom formulas, and accepting user input through parameters. Additionally, you will receive instruction in showing workflow, workflow history and adding workflow task/status criteria. Finally, we will close the training with instruction in the creation of a report showing the results of an inspection. The report will show details of inspection results, guide-sheet, and guide-sheet items associated with the inspection.</p>
<p>Train - the – Trainer</p> <p>Delivered by Professional Services</p>	<p>This course is designed to certify agency trainers/super-users knowledge and understanding of their unique instance of the Civic Platform and associated components. Course places special emphasis on the following areas: Civic Platform and Citizen Access overview, user groups and hierarchies, data types and search, task assignments and filters, records, record functionality, fees and payments, processing records, working with inspections, Accela maps/GIS, Citizen Access, End-user training resources available in Accela University. Course experience will include demonstration using select agency records, hands-on exercises and participant testing. Course experience is designed to be completed within 24 hours of instruction but can be extended upon request or in special circumstances where additional record types with special complexity may require additional hours of instruction. Introductory Civic Platform courses that teach Accela functionality (not agency-specific) are available to all agency end-users for free on the University.</p>

APPENDIX C: CUSTOMIZATION

CUSTOM REPORTS

The project timeline assumes the following custom reports will be developed. If more custom reports are identified outside the below estimates, Accela and Agency will need to assess level of effort and follow the change control process.

- **Zero (0)** Very High Complexity Report - High complexity reports that may include the following: multiple layouts, large number of fields, multiple headers, footers and page breaks.
- **Zero (0)** High Complexity Report - Reports that require complex queries, joins, multiple sources, etc. Examples include statistical and analytical reports, schedules, and agendas.
- **Three (3)** Medium Complexity Reports - Reports that require some calculations and summaries. Examples include forms and transaction reports (receipts, permits, inspection tickets, journals, logs). Many agency reports fall under this category.
- **Zero (0)** Low Complexity Reports - Reports that require a simple pull from a limited number of database fields and presentation on a document. Examples include letters such as Certificates of Occupancy, notices, and mailing labels.

Changes to the report specifications after approval can negatively impact project progress and the overall schedule. Therefore, changes to the report specifications after approval requires an analysis by Accela to determine the level of effort required, and if a Change Order would be required to complete the work.

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

INTEGRATIONS

For each integration, Accela will work with Agency's technical and business leads to document the functional and technical requirements of the integration. Results will be captured in an Interface Specifications Document. Interface development begins upon written approval of the specifications. It is expected that all interfaces will use Accela's Construct API, web services or batch engine. No custom or third-party integration tool will be used to accomplish input or output of data to/from the Accela system. In other words, data coming into Accela and data coming from Accela will use the existing integration technology. Agency responsibility includes obtaining permission for level/type of integration from appropriate application owners (including on premises or cloud/hosted, etc.). Further, 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 the vendor 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 back office
- Refunds handled manually
- No trust accounts
- Additional 5 fields of metadata from direct transaction/permit records sent to payment processor
- Single merchant account

DATA CONVERSION

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. This iterative process will take place for the following data source(s):

- AMANDA

Accela will provide office hours to support data mapping and scripting activities, up to three hundred and twenty **(320) hours**.

Accela conducts mini-mock conversion runs throughout the project to support our implementation methodology. The mini-mock runs are done in a dedicated conversion environment (CIVCON). In addition to the iterative mini-mock runs, Accela will load up to two (2) Mock Runs into a Non-Production environment, in addition to one (1) Final Go-Live Production Run.

APPENDIX D: ACCELA METHODOLOGY

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

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

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



DEFINE

The Define Stage sets the plan and foundation for the Agency’s Accela Civic Platform implementation. The stage will be initiated once the parties execute all contract documents. This stage defines how the project will be managed throughout its lifecycle. Accela will provide 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. Accela will further categorize the record types into logical groups (Solution Groups) based on similar functions. The Solution Inventory is used as the basis for solution change control and workshop scheduling.

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

Agency Staff:

- Agency Project Sponsor
- Project Manager

- Organization Change Manager

Accela Staff:

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

Accela Responsibilities:

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

Agency Responsibilities:

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

PROJECT SCHEDULE

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

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

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

Output:

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

Accela Responsibilities:

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

Agency Responsibilities:

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

PROJECT MANAGEMENT PLAN

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

The following outputs are included:

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

milestones, the associated entry/exit criteria, and identify team members that will be responsible for each progress milestone.

Accela Responsibilities:

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

Agency Responsibilities:

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

SOLUTION PROVISIONING

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

Accela Responsibilities:

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

Agency Responsibilities:

- Validate that the subscribed solution is available.

PROJECT KICKOFF MEETING

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

Accela Responsibilities:

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

Agency Responsibilities:

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

REFINE

The Refine stage begins the knowledge transfer of the Accela Civic Platform and adoption of the new system. This stage is where tailoring of the Civic Application for the Agency is performed. Accela starts this stage with training the Agency's core team on the subscribed Accela solution, then conducts Civic Application Tailoring readiness sessions. Following these sessions, the Tailoring Sessions begin, using the Accela Civic Application non-production system real-time review of the provisioned Solution Inventory, reviewing each Solution Group incrementally. During the sessions, Accela will demonstrate the Civic Application solution components that pertain to the Agency's application/record type(s), identify areas available for tailoring based on [Appendix A](#), and make real-time tailoring updates as appropriate. As the Tailoring Sessions continue for additional application/record types, the Accela team will evaluate points of integration and collaborate with the Agency on the concept design for these integration points. During the Refine stage the Accela team will also orient the Agency to the legacy data mapping tool, Accela schema, and associated activities. Upon accepting the configuration of each grouping, the Agency and Accela team will conduct a Conference Room Checkpoint where Agency stakeholders will be invited to an overview of the system at this point in the project.

CORE TEAM TRAINING

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

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

Accela Responsibilities:

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

Agency Responsibilities:

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

ACCELA SOLUTION TAILORING

Following the core team training, the team will begin tailoring the Agency's Civic Application Solution. Please refer to [Appendix B](#) for the estimated tailoring. Throughout the sessions, Agency staff will continue

to learn how the Civic Application features are mapped to Agency record types and to their end-to-end processes.

TAILORING ORIENTATION

Prior to conducting the individual tailoring sessions, Accela will conduct an orientation meeting. The key Agency staff that will participate in the sessions will all attend the orientation. During this session, Accela will:

- Review dates and times of all sessions, as well as required participants
- Describe expectations of the sessions and the format/agenda
- Review [Appendix A](#) (Solution Inventory), [B](#) (Tailoring Framework) and [C](#) (Customization)
- Review roles and responsibilities of the sessions and final goal (conference room checkpoint)

TAILORING SESSIONS

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

Tailoring sessions for each group generally cover the following topics:

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

Sessions adhere to the following format:

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

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

Output:

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

Accela Responsibilities:

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

Agency Responsibilities:

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

FINALIZATION AND CONFERENCE ROOM CHECKPOINTS

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

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

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

Finalization expectations:

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

Conference Room Checkpoint expectations:

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

Output:

- Finalized tailored solution ready for the Develop stage

Accela Responsibilities:

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

Agency Responsibilities:

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

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

AUTOMATION INVENTORY

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

REPORT INVENTORY

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

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

Accela Responsibilities

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

Agency Responsibilities

- Make available the appropriate key Agency users and content experts to participate in creating the report inventory.
- Provide Accela standard branding information (e.g., Agency logo and contact information) for all standard reports.
- For any custom reports identified, capture the custom report criteria and layouts.
- 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.

REPORT SPECIFICATIONS

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

Accela Responsibilities

- Document the Report Specification for each report in [Appendix C](#).
- Finalize each Report Specification based on one round of feedback from the Agency.

Agency Responsibilities

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

INTEGRATION SPECIFICATIONS

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

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

Accela Responsibilities:

- Conduct integration design sessions to review the interfaces in scope.
- Document the Integration Specification document for each integration in [Appendix C](#).
- Finalize each Integration Specification based on one round of feedback from the Agency.

Agency Responsibilities:

- Make available the appropriate key users and system experts to participate in the integration analysis and validation activities.
- Review each Integration Specification document and provide one round of feedback.
- Review and approve the final Integration Specification document to validate the comments are incorporated.
- Provide links and credentials for third party systems.

- Handle all coordination with 3rd party vendors including review of specifications if deemed required.

DEVELOP

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

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

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

AUTOMATION DEVELOPMENT

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

Accela Responsibilities:

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

Agency Responsibilities:

- Test automation to ensure it is built and functioning per the approved user stories.
- Make available the appropriate key users and content experts to participate in the development and validation activities.
- Request Change Order if changes to user stories are required.

REPORT DEVELOPMENT

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

If Accela is developing:

Accela Responsibilities:

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

Agency Responsibilities:

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

- Request Change Order if changes to specifications are required.

INTEGRATION DEVELOPMENT

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

Accela Responsibilities:

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

Agency Responsibilities:

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

ACCELA GIS CONFIGURATION

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

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

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

Accela Responsibilities:

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

Agency Responsibilities:

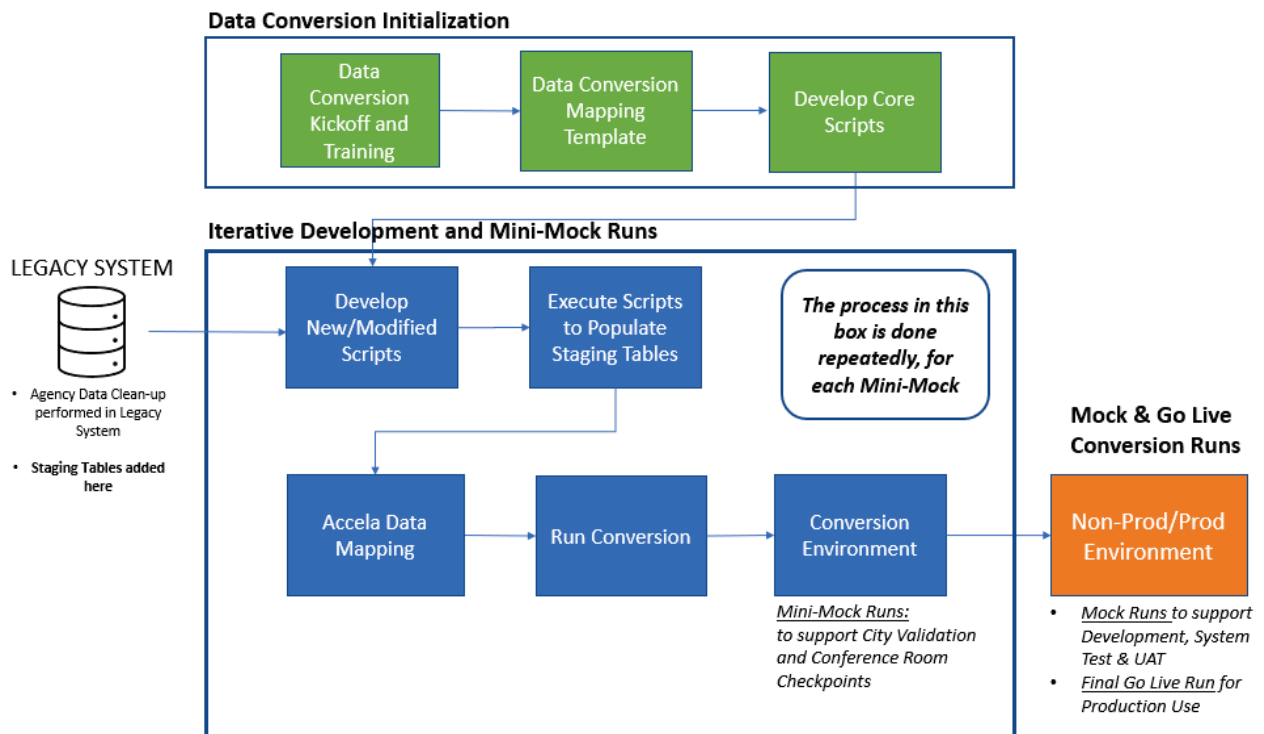
- Arrange for the availability of appropriate staff for the system setup, testing, and quality assurance throughout the configuration process.
- Order and procure necessary hardware, non-Accela systems software, and networking infrastructure as specified by Accela.
- Prepare the hardware, software, and network in accordance with the specifications provided by Accela.
- Provide people and physical resources based on the dates outlined in the project schedule.
- Provide Accela with network access to ArcGIS service, or the public link.
- Provide information and data in the formats specified by Accela that will be needed for the GIS implementation.
- Test each GIS integration to ensure that it is configured and functioning.
- Agency staff must review and test the integration and provide feedback to Accela Delivery based on the agreed upon project schedule timeline. 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. Accela's data conversion methodology is an iterative process, starting early in the project and ensuring the Agency sees data frequently during the development activities. Accela provides a separate Conversion environment (CIVCON), in addition to the Agency's non-production environments. The Conversion environment will be a fully functional environment and will mirror the Agency's configuration, without impacting the non-production environments.

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

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



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

AGENCY ROLES

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

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

DATA CONVERSION INITIALIZATION

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

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

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

ITERATIVE DEVELOPMENT AND MINI-MOCK RUNS

The steps that follow are repeated for each mini-mock run. Each run builds upon the prior one, so it is a cumulative process.

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

- b. Prior to a conversion run, the Agency will provide Accela with the populated staging tables from the legacy database, as well as the completed Mapping File from above.
 - c. Accela will run a conversion to the Conversion environment (CIVCON), leveraging the run book and Accela Conversion Tools.
8. Conversion Environment (CIVCON)
 - a. As a result of the conversion run, the data lands in the Accela Schema. Conversion runs are always first into a dedicated Conversion environment (CIVCON). CIVCON will mirror the configuration completed to date. The Agency is required to validate the data in CIVCON and ensure processing of converted records.
 - i. Accela can provide a copy of the Accela Schema to assist in technical validation.
 - ii. It is critical that the business users use CIVCON to perform functional testing and ensure processing of converted records.
 - b. Mini-mock runs only go as far as this environment (i.e., mini-mock runs do not get loaded into non-prod or prod). The mini-mock runs are done to support an iterative development and testing process, and are also leveraged during the Develop Conference Room Checkpoints to demonstrate converted data as part of the solution built to date.

MOCK & GO LIVE CONVERSION RUNS

9. Non-Prod/Prod Environment
 - a. If a conversion is targeted for load into a Non-Production or Production environment, it is taken a step further here to move the data from CIVCON to the targeted environment. This is completed by Accela's Cloud Operations team. Please refer to [Appendix C – Data Conversion](#) for how many runs are in scope.
 - i. Mock Runs are loaded into a non-production environment.
 - ii. The Go-Live Run is loaded into the production environment.

Accela Responsibilities

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

Agency Responsibilities

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

General Information and Requirements for Data Conversion:

- The Civic Application solution tailoring must be finalized before Accela will support the data conversion mapping effort.
- The standard data conversion includes the conversion of transactional data to the Accela database when a configured target destination exists. In the event there is no destination for legacy transactional data then it will be required to be converted as best fits into another area of the configuration or excluded from the conversion effort.
- Conversion of transactional tables, Address/Parcel/Owner (APO) data, Professional License data is executed “As-is” from the staging area into Accela. “As-is” means that the data will be transformed as mapped to existing configuration elements in Accela. The conversion process will not create configuration data or alter the mapped data when processed into Accela. Additionally, this means if invalid, inaccurate, or incomplete data is provided, it will be loaded into Accela “As-Is”. All data cleanup must occur prior to load from staging area into Accela.
- The standard document conversion may be utilized to convert record/permit level attached electronic documents into the configured Accela Document Service (ADS). In the event a 3rd party EDMS is used by Accela Civic solution, it is still possible to convert documents if the 3rd party integration supports the create method.
- At a minimum the electronic document(s) to be converted must exist in a Microsoft Windows accessible file system (e.g., NTFS, FAT32) and have the ability to identify the associated Record ID in order to be converted. In the event files exist in a database they must be extracted into a windows file system prior to being evaluated for conversion.

FINAL CONFERENCE ROOM CHECKPOINTS

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

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

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

ACCELA SYSTEM TESTING

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

Accela Responsibilities:

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

Agency Responsibilities:

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

DEPLOY

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

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

TRAINING PLAN

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

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

The Training Plan for trainers will include:

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

Accela Responsibilities:

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

Agency Responsibilities:

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

- Schedule participants and meeting locations for training sessions.

USER ACCEPTANCE TEST (UAT) PLAN

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

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

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

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

It is critical that the Agency devote ample time and attention to the development of their test cases. Accela recommends the Agency use this opportunity to update their Standard Operating Procedures (SOPs) and/or custom Training Materials and leverage these as test cases. The Agency is responsible for creating and verifying all the test cases meet specific business needs. Test cases should confirm record creation, automation, workflows, inspections, citizen access, reporting, etc. and any other specific integration or areas within Accela used in normal business. Accela recommends Agency leverage SOPs as the basis of test cases. Test cases must be validated by the Agency experts and within the scope of the Civic 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, integrations, etc.).

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

User Testing includes the following distinct phases:

1. Initial Test – a timeboxed phase where the Agency runs through every test script and logs all issues in the issue tracker.

2. Defect Remediation – a time for Accela to remediate all Critical and High implementation defects found during Initial Test. As time allows the Agency is encouraged to remediate all Medium and Low implementation defects, in preparation of taking ownership of the solution for post go live.
3. Remediation Testing – the phase where the Agency validates that all Critical and High implementation defects have been resolved.

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

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

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, integrations, and a full mock run of converted data. The Agency will ensure the appropriate Agency and/or 3rd party test environments are available to support integrations.

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

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

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

- **Initial Test:** Agency to execute **all** User Testing test cases. During this phase, Accela and Agency will also begin resolving Critical and High implementation defects identified throughout the testing. At the end of Initial Test, the Agency and Accela will develop and prioritize a User Testing Punch List

to include open Critical and High severity implementation defects that are required for go-live, as defined in [Appendix E](#).

- The punch list must be finalized at the end of the Initial Test phase. Accela will export the current open Critical and High implementation defects from the User Testing issue tracker and review this with the Agency at the close of the phase. Only in-scope issues will be considered for punch list resolution. The Remediation Phase (punch list/defect resolution) will be delayed until the Agency and Accela agree upon the punch list. At this point the issue tracker is closed.
 - 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.
- **Defect Remediation:** Accela will remediate, build and implement configuration updates for the User Testing Punch List (Critical and High implementation defects).
- **Remediation Testing:** Agency will perform testing to confirm the Punch List items are resolved. This period is for retesting issues found during the initial test period. It is not for performing additional User Testing. New issues go to the parking lot. The User Testing is deemed accepted when Agency has verified the Punch List and severity of Critical and High implementation defects have been addressed. Accepted deliverable will become the configuration code set that will be deployed to the PROD environment.

Output:

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

Accela Responsibilities:

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

Agency Responsibilities:

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

PRODUCTION CUTOVER “GO LIVE”

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

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

Agency Responsibilities:

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

POST GO LIVE SUPPORT AND TRANSITION TO ACCELA SUPPORT

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

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

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

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

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

Output:

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

Accela Responsibilities:

- Provide post-production support for Accela developed configuration and components. For example:
 - Assistance with new UI or browser settings since not every user has accessed the new version of our software.
 - Issue research.
 - Escalation of issues that can’t easily be resolved.

- Assist with the identification of issues for the Post-Production Issues List.
- Assist with issues that may arise related to the deliverables in this onboarding package.
- Transfer ongoing support of the Agency to the Accela Customer Support program.

Agency Responsibilities:

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

CIVIC PLATFORM TRAIN-THE-TRAINER TRAINING

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

Output:

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

Accela Responsibilities:

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

Agency Responsibilities:

- Notify Accela trainer of selection of up to 3 record-types for training demonstration and workshops.
- Provide Accela trainer with access to Agency workflow/business process SME no later than two weeks prior to the scheduled Train-the-trainer event.
- Ensure that trainees have appropriate hardware/software for successfully participating in the online training.
- Staff participants have successfully read and completed any recommended online course content.
- Participant maximum is 12 trainees.
- Schedule End User Training for the Agency.
- Conduct End User Training.

APPENDIX E: PROJECT RESOURCES

AGENCY RESOURCES

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

Agency Resources	Description
Project Sponsor	Responsibilities include: <ul style="list-style-type: none"> • Represent the strategic and financial interests of the Agency within context of the project • Create an environment that promotes project buy-in • Stay informed and provide high-level oversight throughout the duration of the project • Serve as the primary escalation point to address project issues and remove obstacles in a timely manner
Steering Committee	<ul style="list-style-type: none"> • Provide input to the development of the project, including the evaluation strategy; • Provide advice on the budget; • Define and help to achieve the project outcomes; • Identify the priorities in the project – where the most energy should be directed; • Identify potential risks; • Monitor risks; • Monitor timelines; • Monitor the quality of the project as it develops; • Advise (and sometimes making decisions) about changes to the project as it develops
Project Manager	Agency will provide a dedicated Project Manager throughout the course of the engagement. Responsibilities include: <ul style="list-style-type: none"> • Overall administration, coordination, communication, and decision-making associated with the implementation • Plan, schedule, and track the implementation with Accela and across departments within the agency • Primary responsibility for the coordinating and scheduling of Agency employees and facilities in support of project activities. • Supervision of the Agency team members to ensure the project team stays focused, tasks are completed on schedule, and that the project stays on track
Product/System Administrator	<ul style="list-style-type: none"> • Participate in system configuration and build out as much as possible, working closely with Accela implementation team

	<ul style="list-style-type: none"> • Assist Agency end users with testing • Attend system administration training • Post go-live, take over internal administration of Accela system
Division/Departmental Business Leads	<p>A user representative for each affected department must be appointed to facilitate analysis and configuration and serve as a decision-making entity for that group. These critical appointments may well determine the success of the implementation for their respective areas.</p> <p>The designated Leads assist the Agency Project Manager in delegating project tasks, driving priorities for the department and ensuring action items are completed in a timely manner.</p> <p>Responsibilities include:</p> <ul style="list-style-type: none"> • Attending tailoring sessions • Willing and able to gather data and make decisions about business processes • Assumes the Responsible Expert role for any record groupings assigned to the department • Lead the Conference Room Checkpoints for the department record groups • Participate in knowledge transfer opportunities in order to understand the solution
Division/Departmental Subject Matter Expert (SME)	<p>Responsibilities include:</p> <ul style="list-style-type: none"> • Being trained on the Accela system and proactively learning the system as it is implemented • Being fully engaged in the sessions and system configuration activities • Provide expertise in their business area • Writing of test cases • Assist internal efforts towards the creation of reports, integrations & conversions • Review and testing of the solution • Review and testing of the converted data • Actively participate in the full implementation of the Accela solution
Integration Developer	<p>Responsibilities include:</p> <ul style="list-style-type: none"> • Liaison between Accela and 3rd party providers • Understand integration needs of Agency and build designs • Write integration methods to meet the Agency requirements • Participate in unit and system testing
Report Developer	<p>Responsibilities include:</p> <ul style="list-style-type: none"> • Understanding reporting needs of Agency • Write or amend reports as the Agency requirements determine • Participate in unit and system testing
Data Conversion Leads	<p>Responsibilities include:</p> <ul style="list-style-type: none"> • Lead efforts to cleanse the legacy data to be migrated • Attend Accela Data Conversion Training • Create data mappings

	<ul style="list-style-type: none"> • Write extraction scripts, transformation, business rule routines to move data from legacy data source to Accela staging area • Review and validation of the converted data • Participate in mock data runs during the implementation and final production conversion
Organization Change Management Agent	<p>Accela does not provide Change Management services as it relates to Organizational Change Management (OCM). Accela supports the OCM objectives by supplying technical training, content for awareness meetings, demonstrations to user groups during the project, but we find the most success for the Agency to own the OCM objectives and have a dedicated change agent with the organization.</p> <p>Responsibilities related to the Accela workstream:</p> <ul style="list-style-type: none"> • Have a designated OCM representative attend the Accela analysis sessions and determine how best to align Agency operational process with technical solution workflow. • Access the Accela test environment to become more familiar with the solution. • Participate in verification of the solution and attend Conference Room Checkpoints. • An Accela trainer can work with the OCM representative on a plan on how the Accela end user training will be integrated with the OCM campaign.
Trainer	<ul style="list-style-type: none"> • Primary responsibility for understanding the solution through attending the Train-The-Trainer sessions • Build the training materials for end users from the materials provided from Accela • Conduct End User Training

ACCELA RESOURCES

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

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

	<p>The Project Manager undertakes the project administration tasks including:</p> <ul style="list-style-type: none"> • Develop and maintain project plan • Resource management and tracking • Risk identification and mitigation • Issue management and escalation • Status reporting • Provide direction and facilitate team meetings
Solution Architect	<p>Accela’s Solution Architect is responsible for the overall solution architecture and will:</p> <ul style="list-style-type: none"> • Recommend standard and custom solutions for business requirements • Architect new custom solutions for Agency-specific scope • Provide Solution Architect oversight throughout the implementation • Guide the customer and project team with best practices and standards • Confirm delivered solutions follow best practices and standards
Implementation Lead	<p>The Implementation Lead assigned to the project will have significant experience in the business functions as well as the product functionality and is responsible for:</p> <ul style="list-style-type: none"> • Lead tailoring sessions • Lead the tailoring/system configuration • Providing training/mentoring to Agency staff • Coordinate with technical team members through analysis and testing as it relates to Agency processes
Implementation Consultant	<p>Implementation Consultant resources support the project as-needed and typically focus on the following tasks:</p> <ul style="list-style-type: none"> • Provide support during tailoring sessions • Perform tailoring/system configuration • Unit and functional testing
Technical Consultant(s)	<p>Accela Technical Consultants are involved in the project to perform the following responsibilities:</p> <ul style="list-style-type: none"> • Lead integration analysis, specifications and development • Lead report analysis, specifications and development • Provide data conversion expertise, training, mapping assistance, and execute data conversion runs
Training Consultant	<p>Training Consultants are responsible for Accela Training classes with assistance from Implementation consultants, depending on the nature of the specific project.</p>

APPENDIX F: DEFECT DEFINITIONS

ISSUE TYPES

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

DEFINITION OF DEFECT SEVERITIES

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

Severity Level	Description
Critical	<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"> 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 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. 3. The Payment Integration is down which would not allow the online records from being created and the back-office staff would not be able to proceed with workflow due to business rules preventing the advance of workflow if there are outstanding fee due.
High	<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"> 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. 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. 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. 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. 5. Workflow assignment is either not assigning to the correct department or is not assigning to a department (i.e. department would be blank). The workaround, Supervisors or Managers would need to use the Unassigned Reviews report for workflow assignment.

	<p>6. A Notification going to one of the contacts identified as recipient, but not all (for example going to the Applicant, but not the Owner). The workaround, Staff would take more calls around the notification not received by the citizen</p>
<p>Medium</p>	<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"> 1. Notification going to citizens where Assigned Reviewer, Address, or Contact Types is missing. The workaround, Staff would take more calls around the notification received by the citizen. 2. Notification going to one of the contacts identified as recipient, but not all (for example going to the Applicant, but not the Owner). MUST be going to Applicant to be considered medium. The workaround, Staff would take more calls around the notification not received by the citizen. 3. Workflow assignment for the round-robin is incorrectly assigning staff users. The workaround, Staff assigned to the record would need to re-assign the workflow to the appropriate Staff 4. Incorrectly setting due dates in the workflow based on defined business rules. The workaround, Staff would need to manually set the due date. 5. Required 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.
<p>Low</p>	<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"> 1. Misspellings on instructions, data elements, report content, or notifications content. 2. Font inconsistencies, if data elements or online portal language is written in different fonts in different sections. 3. Inconsistency with Console configuration between departments, for example the record selection where there is the drop down rather than the decision tree or constraint within the defined filter is not displaying the entire defined criteria.



Proposed by: Tyler Stanchina
 Contact Phone:
 Contact Email: tstanchina@accela.com
 Quote ID: Q-38749
 Valid Through: 5/1/2026
 Currency: USD

9110 Alcosta Blvd, Suite H #3030
 San Ramon, CA, 94583

Order Form

Address Information

Bill To:

County of Fresno, California
 1221 Fulton Mall, 3rd Floor
 Fresno, California 93702
 United States

Ship To:

County of Fresno, California

 , California,
 United States

Billing Name: Elisania Harrison
 Billing Phone: (559) 600-2519
 Billing Email: eharrison@fresnocountyca.gov

Services	Year	Start Date	End Date	Term (Months)	Price	Qty	Net Total
Accela Service Request Management - SaaS	Year 1	04/01/2026	03/31/2027	12	\$1,200.00	20	\$24,000.00
TOTAL:							\$24,000.00

Services	Year	Start Date	End Date	Term (Months)	Price	Qty	Net Total
Accela Service Request Management - SaaS	Year 2	04/01/2027	03/31/2028	12	\$2,400.00	20	\$48,000.00
TOTAL:							\$48,000.00

Services	Year	Start Date	End Date	Term (Months)	Price	Qty	Net Total
Accela Service Request Management - SaaS	Year 3	04/01/2028	03/31/2029	12	\$2,520.00	20	\$50,400.00
TOTAL:							\$50,400.00

Services	Year	Start Date	End Date	Term (Months)	Price	Qty	Net Total
Accela Service Request Management - SaaS	Year 4	04/01/2029	03/31/2030	12	\$2,646.00	20	\$52,900.00
TOTAL:							\$52,900.00

Services	Year	Start Date	End Date	Term (Months)	Price	Qty	Net Total
Accela Service Request Management - SaaS	Year 5	04/01/2030	03/31/2031	12	\$2,778.30	20	\$55,560.00
TOTAL:							\$55,560.00

Pricing Summary

Period	Net Total
Year 1	\$24,000.00
Year 2	\$48,000.00
Year 3	\$50,400.00
Year 4	\$52,900.00
Year 5	\$55,560.00
Total	\$230,860.00

Additional Terms:

- Notwithstanding anything to the contrary, this Order Form for Subscription Services, Enhanced Reporting Database (ERD), and Managed Application Services (MAS) is governed by the applicable terms and conditions at [Accela Terms](#) (collectively, the "Agreement")
- No additional or conflicting terms or conditions stated in Customer's order documentation, including, without limitation, purchase orders, will be incorporated into or form any part of this Order Form or the governing agreement, and all such terms or conditions will be null and void.
- All Software Licenses, Maintenance, and Subscription purchases are non-cancelable and non-refundable.
- If Customer has a prior agreement with Accela, and this purchase is co-termining with that prior agreement, if the start date on this Order Form is before the actual delivery date of the purchase, Accela may pro-rate this purchase so that it can co-term with the prior agreement.
- If this Order Form is executed or returned to Accela by Customer after the Order State Date above, Accela may adjust the Order Start Date and Order End Date without increasing the total price based on the date Accela activates the products and provided that the total term length does not change.
- Pricing is based upon payment by ACH and check. Payment by credit card (including Purchase Cards) for product and services in this Order Form will be subject to a service charge of 3%. There is no service charge for ACH or check payment.
- Customer may purchase additional licenses at the same price and for the same term as the licenses in this Order Form. Additional licenses purchased in this way will have the same annual price applicable for the purchase period and will have the same uplift and term dates as Customer's existing licenses.
- The Terms of this Agreement are contingent on the approval of funds by the appropriating government agency. If sufficient funds are not allocated, then the County, upon at least 30 days advanced written notice to the Contractor, may: (A) Modify the services provided by the Contractor under this Agreement, or (B) Terminate this Agreement

Signatures

Accela, Inc.	Customer
Signature:  <small>Signed by: 73668EE5EB274C8...</small>	Signature:
Print Name: Michael E Gigliello	Print Name: Garry Bredefeld
Title: Controller	Title: Chairman of the Board of Supervisors of the County of Fresno
Date: Apr-23-2026	Date: May 12, 2026

Organization: 4620
Acct: 7295, 7311
Fund: 0001
Subclass: 10000