

Statement of Work



City of Fort Bragg, CA

**Implementation of Accela Civic Applications
for a
Building, Planning and Engineering**

6-26-24

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TABLE OF CONTENTS

TABLE OF CONTENTS	2
DOCUMENT CONTROL	3
INTRODUCTION	4
OVERVIEW.....	4
CRITICAL SUCCESS FACTORS.....	4
PROJECT ASSUMPTIONS	5
GENERAL PROJECT ASSUMPTIONS	5
PROJECT RESOURCING ASSUMPTIONS.....	5
ACCELA SOLUTION ASSUMPTIONS.....	6
ADMINISTRATION.....	6
CHANGE ORDERS	6
APPENDIX A - ACCELA IMPLEMENTATION APPROACH.....	7
APPENDIX B.....	9
BASIC SCOPE OF WORK	9
STAGE 1 - INITIATION.....	9
TASK 1: PROJECT INITIATION	9
TASK 2: ACCELA ENVIRONMENT DEPLOYMENT.....	9
STAGE 2 – To-Be / BUSINESS ANALYSIS	10
TASK 3: To-Be ANALYSIS AND CONFIGURATION DOCUMENT	11
STAGE 3 – SOLUTION FOUNDATION	11
TASK 4: ACCELA BASE CIVIC PLATFORM SOLUTION FOUNDATION	11
TASK 5: ACCELA CIVIC PLATFORM	12
STAGE 4 – BUILD.....	12
TASK 6: BUSINESS PROCESS VALIDATION AND AUTOMATION (BUSINESS RULE SCRIPTING).....	13
DATA CONVERSION (NOT REQUIRED AND THIS POINT)	13
SYSTEM INTERFACES	13
TASK 7A THRU C: INTERFACE ANALYSIS AND DEVELOPMENT	14
REPORTS	15
TASK 8: REPORT SPECIFICATIONS.....	15
TASK 9: REPORT DEVELOPMENT	15
TASK 10: ACCELA CITIZEN ACCESS CONFIGURATION AND INTEGRATION TO DIGEPLAN	16
TASK 11: ACCELA GIS CONFIGURATION.....	16
TASK 12: ACCELA MOBILE DEPLOYMENT	17
STAGE 5 – READINESS	17
TASK 13: TRAINING	17
TASK 14: USER ACCEPTANCE TESTING (UAT) AND GO LIVE PREP	18
STAGE 6 - DEPLOY	18
TASK 15: PRODUCTION SUPPORT	18
PROJECT TIMELINE	19
PROJECT SERVICES BUDGET	20
EXPENSES:.....	20

DOCUMENT CONTROL

Date	Author	Version	Change Reference
6-26-24	Keith	v1.0	Initial Draft

INTRODUCTION

OVERVIEW

The following Statement of Work will detail how TruePoint Solutions will implement the software and services you have purchased.

This Statement of Work (“SOW”) sets forth a scope and definition of the consulting/professional services, work and/or project (collectively, the “Services”) to be provided by TruePoint Solutions (“TruePoint”) to Agency (“City of Fort Bragg”).

CRITICAL SUCCESS FACTORS

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

- **Dedicated Agency Participation** – Agency acknowledges that its staff must be actively involved throughout the entire duration of Services as defined in the agreed upon Project Plan. TruePoint will communicate insufficient participation of Agency resources through Project Status Reports with real and potential impacts to the project timeline. TruePoint will work with the project sponsors and department leaders to determine appropriate team member involvement. This could range from full-time, during early analysis meetings, to part-time during the technical implementation phase.

- **Knowledge Transfer** – It is critical that Agency personnel participate in the analysis, configuration, and deployment of Accela Civic Platform for TruePoint to transfer knowledge to the Agency. Once Postproduction assistance tasks are completed by TruePoint, the Agency assumes all day-to-day operations of Accela Civic Platform outside of the Support and Maintenance Agreement. The Support and Maintenance Agreement does not cover any Agency manipulation of implemented scripts, reports, interfaces, and adaptors. Key knowledge transfer areas could include:
 - Configuration
 - Business Rules Scripting
 - Interfaces
 - Reports and Forms
 - Release Management

PROJECT ASSUMPTIONS

GENERAL PROJECT ASSUMPTIONS

Scope and Timeline

- Scope is based on RFP response and feedback with Agency prior to the SOW development.
- Agency and TruePoint will review their responsibilities before work begins to ensure that Services can be satisfactorily completed and in the appropriate timeframe.
- Tasks not specifically described in this document are the responsibility of Agency.
- “Go live” (system is in production) timeline assumes timely completion of Agency deliverables (including finalization of requirements / use cases), availability of key Agency resources, and collaboration and availability of any third-party vendor resources. Late (per mutually agreed project plan) Agency deliverables may adversely impact overall implementation timeline.
- Overall project plan will be mutually agreed to by Agency and TruePoint project managers prior to final Configuration.

Training

- Project assumes that a Train the Trainer approach will be taken during this implementation. The Trainer will train the Agency super users in the day-to-day operation features of Accela. The training will also focus on successful training techniques and styles for training system end users that can be performed via web training sessions.

Testing

- TruePoint is responsible for testing the initial configuration of system along with functional use cases sample input/output for each (as demonstrated on onsite visit).
- TruePoint to validate system and interfaces before turning module over to the Agency for testing.
- Agency is responsible for User Acceptance Test and System Integration Testing

Go Live and Go Live Support

- “Go Live” definition is that the Accela software is up and running in production. If an Agency moves to production, i.e., “Goes Live” it is deemed to have accepted the product and shall comply with any payment obligation for “Go-Live” and/or “Acceptance”.

PROJECT RESOURCING ASSUMPTIONS

Agency Resourcing

- Agency will provide a Project Manager throughout the course of the implementation.
- Agency Project Manager will maintain primary responsibility for the scheduling of Agency employees and facilities in support of project activities.
- Agency has committed to the involvement of key resources and subject matter experts for ongoing participation in all project activities as defined in the project plan associated with this SOW.
- Agency agrees during the Initiation Phase of the project to assign a designated approver for each major project deliverable. The designated approver will be responsible for overseeing and/or directly participating in the design and development, as well as the approval, of the deliverable. Agency may make changes to designated approvers with written notification to TruePoint a minimum of one month before a deliverable is due.
- Agency will provide access to subject matter experts and decision makers in a timely fashion.

TruePoint Resourcing

- TruePoint has assumed that project team will need to be on-site as appropriate with-in the expense budget. Any additional on-site consulting will be at the mutual agreement of Agency and TruePoint Project Manager. All travel expenses incurred for on-site work are per the terms of expense reimbursement outlined above.
- In the pricing, TruePoint has assumed the appropriate resourcing to ensure deployment success for the scope outlined. Significant additional support requested by Agency over this level of resourcing would necessitate a change order that could impact the cost of the project.
- TruePoint will provide a project manager for services throughout the implementation to plan and monitor execution of the project in accordance with deliverables outlined in the Statement of Work. To support the implementation of the Accela Civic Platform software at the Agency, TruePoint will provide Project Management services throughout the project.
- Changes in project scope or expectations that require additional worked hours over the hours or scope stated in the SOW may require a Change Order.

ACCELA SOLUTION ASSUMPTIONS

General

- TruePoint will implement the most current version of Accela Civic Platform that is available at time of initial installation. This will likely be Civic Platform 24.1.0
- Agency will provide/purchase/acquire the appropriate hardware, software, and infrastructure assets to support all required Accela software products in both support/testing and production environments as defined in the project schedule.
- For use with Accela Citizen Access, Agency will provide/purchase/acquire an Accela supported online merchant account and all related hardware required by the merchant account provider for the handling of credit cards and/or checks.

ADMINISTRATION

CHANGE ORDERS

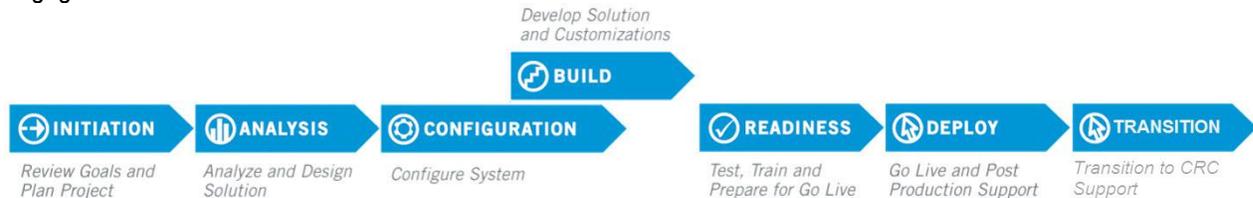
To make a change to the scope of Professional Services in this SOW, Agency must submit a written request to TruePoint specifying the proposed changes in detail. TruePoint shall submit to Agency an estimate of the charges and the anticipated changes in the delivery schedule if any that will result from the proposed change in the Professional Services (“Change Order”). TruePoint shall continue performing the Professional Services in accordance with the SOW until the parties agree in writing on the change in scope of work, scheduling, and fees. Any Change Order shall be agreed to by the parties in writing prior to implementation of the Change Order.

APPENDIX A - ACCELA IMPLEMENTATION APPROACH

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

IMPLEMENTATION LIFE CYCLE

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



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

INITIATION

Initiation represents the first stage in the lifecycle. During the Initiation stage, project contracts and the SOW are finalized, project scope and objectives are reviewed, and project planning activities and deliverables are completed.

ANALYSIS

Analysis is the second stage in the lifecycle. During the Analysis stage, TruePoint reviews existing agency documentation, interviews agency staff, and conducts workshops to understand the “To-Be” vision of the Agency that can be executed with the aid of Accela Civic Platform. It is during this Phase that TruePoint gains a deeper understanding of Agency processes and business rules; simultaneously, the Agency begins to gain a deeper understanding of the methodology and Accela Civic Platform capabilities. A key output of this Phase is the To-Be Analysis Document(s) which serve as the ‘foundation’ for configuration of Accela Civic Platform to support germane elements of the Agency “To-Be” vision. Supplementing the To-Be Analysis Document(s) are all other configuration specifications documents related to data conversion, interfaces, reports, and event scripts.

SOLUTION FOUNDATION

Solution Foundation is the third stage in the lifecycle. It begins upon completion of Stage 2 and should be completed prior to the next stage, Build. During the Solution Foundation stage, Accela Civic Platform will be built to match the to-be processes agreed to in the Analysis stage. Essential to this effort is the configuration of the Record (Case, Application, Permit, etc.) types that were agreed to during the Analysis phase.

BUILD

Build serves as the fourth stage in the lifecycle, and execution of this stage overlaps Configuration, but ends after Configuration is complete. During the Build stage, all defined elements during the Analysis stage

beyond the Solution Foundation will be implemented. This includes conversions, business rule scripts, interfaces, and reports.

READINESS

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

DEPLOY

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

APPENDIX B

BASIC SCOPE OF WORK

The following section describes the specific activities and tasks that will be executed to meet the business objectives and business requirements of the Agency. In support of the implementation effort as described above, TruePoint will provide the following implementation services

STAGE 1 - INITIATION

TASK 1: PROJECT INITIATION

Project initiation is an opportunity to ensure the project starts in a well-organized, structured fashion while re-confirming the Agency and TruePoint expectations regarding the implementation. This task is comprised of project planning activities, core project management documents and templates and the project kickoff.

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

- Finalize staffing for the project teams.
- Conduct a Kickoff meeting. The objective of this meeting is to review the purpose of the project and discuss the project scope, roles and responsibilities, deliverables, and timeline.
- Finalize an integrated baseline project plan that includes resource allocation for all tasks (in cooperation with the Agency Project Manager).
- Conduct Core Team training to prepare the Subject Matter Experts for the To-Be Analysis stage.

TruePoint Responsibilities:

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

Agency Responsibilities:

- Identify and set expectations with key resources and subject matter experts for ongoing participation in the project.
- Provide timely and appropriate responses to TruePoint's requests for project planning input and meeting logistics requests.
- Work with TruePoint PM to schedule remote Project Kickoff and other activities as needed.

TASK 2: ACCELA ENVIRONMENT DEPLOYMENT

TruePoint will work with Accela to setup the Accela Automation software in the Accela Cloud environment, such that Agency can log into the system and verify that the software is available. TruePoint will populate the new environment with civic application templates or configuration from other implementations.

STAGE 2 – TO-BE / BUSINESS ANALYSIS

To-Be Analysis is comprised of the activities required to define the Accela Civic Platform Solution Foundation for the Agency. The key output of the process is the Configuration Document(s), which serves as a 'blueprint' for design and baseline configuration efforts throughout the implementation. The following departments will participate in the Business Analysis (Analysis for: Building, Planning and Public Works).

- Build Permits
 - New, Addition, Repair/Replace, Demolition
 - Reroof
 - Fire Repair
 - Pool
 - Electrical, Mechanical, Plumbing
 - Mobile Home
 - Deck/Patio Cover
 - Window Change
 - Garage/Storage

- Planning
 - Pre-Application
 - Entitlements
 - Design Review/Site & Architectural Review
 - Use Permit/Minor Use Permit
 - Coastal Development Permit
 - Variance/Administrative Variance
 - Lot Line Adjustment
 - Subdivision (no. of parcels) _____
 - Certificate of Appropriateness (COA)
 - Planned Development Permit
 - Certificate of Compliance
 - General Plan Amendment
 - Local Coastal Program Amendment
 - Rezoning
 - Annexation
 - Preapplication Conference
 - Limited Term Permit
 - Permit Amendment (list permits) ____
 - Address Listing
 - Sign

- Public Works
 - Grading
 - Encroachment

The Configuration Document(s) will provide detailed information on the Agency's business processes to be configured in the Accela Civic Platform Solution Foundation, including the following topics:

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

TASK 3: TO-BE ANALYSIS AND CONFIGURATION DOCUMENT

To develop the content for the To-Be Analysis Document(s), TruePoint will work closely with designated Agency personnel and will conduct analysis sessions to capture the “to-be” required business processes. In conjunction with the Agency representatives, TruePoint will perform the following tasks:

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

TruePoint Responsibilities:

- Interview staff to understand existing business processes.
- Conduct to-be analysis sessions to capture the required business processes to be automated within the system.
- Conduct meetings via email, web conference, phone, and in person to gather and validate analysis input.
- Demo basic prototypes off records for each department.

Agency Responsibilities:

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

STAGE 3 – SOLUTION FOUNDATION

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

TASK 4: ACCELA BASE CIVIC PLATFORM SOLUTION FOUNDATION

TruePoint will provide professional services to develop the Solution Foundation of the Accela Civic Platform product in accordance with requirements established and documented in the To-Be Analysis Document(s).

The solution foundation will include core Accela Civic Platform features for:

- Modules

- Admin User and User Groups
- Departments/Divisions
- Consoles (Administrator, Daily User, Inspection, and Cashiering)
- Portlets (Customized portlets for all Automation Screens)
- My Navigation Setup
- Menu Navigation Setup
- Quick Links
- Quick Queries for the Record, Inspection, and My Task Portlets

TASK 5: ACCELA CIVIC PLATFORM

TruePoint will provide professional services to configure Accela Civic Platform and DigEplan in accordance with requirements established and agreed upon during the execution of the tasks that comprise Stage 2 – To-Be Analysis.

The configuration will include Accela Civic Platform features for:

- Users and User Groups
- Record Types (based on Civic Applications)
- Intake Forms
- Workflows
- Fees
- Inspections
- Conditions
- Custom Fields and Lists

TruePoint Responsibilities:

- Configure the foundational components as defined in the To-Be Analysis Document(s).

Agency Responsibilities

- Make available the appropriate Agency key users and content experts to participate in solution configuration of the system to learn about the system and facilitate in knowledge transfer.
- Work with TruePoint to verify that the system meets the foundational requirements documented in the To-Be Analysis Document(s).
- The Agency will test the system for purposes of validating the configuration.

STAGE 4 – BUILD

The Build stage includes data conversions, development of interfaces, development of all Business Process Validation and Automation (Business Rule Scripts and Expressions) configuration of add-on products and custom report development. It comprises all the additional activities outside of solution foundation that are required to complete the total solution for the Agency. Like the Configuration Stage, it is critical that appropriate agency representatives are involved in each step of the process to ensure success.

TASK 6: BUSINESS PROCESS VALIDATION AND AUTOMATION (BUSINESS RULE SCRIPTING)

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

Business Process Validation and Automation is broken out into two functional areas of the Accela solution, as defined below:

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

TruePoint Responsibilities:

- Work with Agency staff to identify potential uses of automation
- Assist with development of a list of desired functionalities
- Aid the Agency in prioritizing which scripts will be developed by TruePoint
- Develop automation scripts based on the specifications

Agency Responsibilities:

- Identify resources that will learn scripting tools and approaches for ongoing maintenance
- Prioritize desired functionality to determine which scripts TruePoint will develop
- Provide timely and appropriate responses to TruePoint's request for information
- Verify the Script Specification meets the intended business requirement
- Allocate the time for qualified personnel to test the script for acceptance

DATA CONVERSION (NOT REQUIRED AND THIS POINT)

SYSTEM INTERFACES

For each interface, the TruePoint technical lead will work together with Agency's technical lead and business leads to document functional and technical requirements of the interface in an Interface Specifications Document. Interface development begins upon written approval of the specifications. It is expected all interfaces will use Accela's 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.). All interfaces will be developed against 1 (one), agreed upon version of the 3rd party system.

TruePoint will conduct Analysis for each Integration that will be developed in the scope of this implementation.

Deliverable	System Name	Description
7A	Address, Parcel Owner Import	Address, Parcel Owner Migration from Accessor files
7B	CSLB	Real time validation from the CSLB from Professional Portlet
7C	Financial System Export	Daily payment by Account export file

TASK 7A THRU C: INTERFACE ANALYSIS AND DEVELOPMENT

To determine the Agency requirements for each interface, analysis sessions will be conducted as a portion of this deliverable. The findings will then be documented in the Interface Specifications Document(s) for use by TruePoint in building the interface code. The implementation of each interface is dependent on the assistance of the Agency's staff, specifically, interface analysis, data mapping, and data manipulation as required in the source system. TruePoint will provide a program to integrate 3rd Party data to/from Accela Civic Platform.

In terms of specific output, the following will be executed for each integration:

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

TruePoint Responsibilities:

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

Agency Responsibilities:

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

REPORTS

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

Reports can be developed using the integral Ad-Hoc Report Writer included with Accela Civic Platform, Microsoft Report Service (SSRS) or Crystal Reports at the Agency's discretion. Custom reports, whether developed with Ad-Hoc Report Writer, SSRS or Crystal Reports, will be deployed in the Report Manager for use within Accela Civic Platform. The Agency will need to create a local Accela DB environment for use in creating and testing reports in-house. Request for a local copy of the Agency data can be requested through CRC.

TASK 8: REPORT SPECIFICATIONS

TruePoint will develop 5 to 10 documents/letters/reports from those identified by the Agency as required for the new system.

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

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

TruePoint Responsibilities:

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

Agency Responsibilities:

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

TASK 9: REPORT DEVELOPMENT

TruePoint will develop custom documents/letters/reports per the specifications developed and approved in the Report Specifications. Changes to the report specifications after approval can negatively impact project progress and the overall schedule.

TruePoint Responsibilities:

- Develop reports per specifications in Accela Ad-Hoc or SSRS.
- Assist in the validation of the reports in test environment

Agency Responsibilities:

- Make available the appropriate key users and content experts to participate in the report development and validation activities
- Request change order if changes to specifications are required

TASK 10: ACCELA CITIZEN ACCESS CONFIGURATION AND INTEGRATION TO DIGEPLAN

This task includes setup and configuration of Accela Citizen Access (ACA) per the Requirements gathered in the To-Be Analysis Phase. TruePoint will work with the Agency representatives to validate and implement Accela Citizen Access to extend certain aspects of the internal Accela Civic Platform configuration for use by the general public.

TruePoint Responsibilities:

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

Agency Responsibilities:

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

TASK 11: ACCELA GIS CONFIGURATION

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

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

TruePoint Responsibilities:

- Demonstrate that the Accela GIS applications are operational in the Agency computing environment thus communicating with the Accela Civic Platform system

Agency Responsibilities:

- Arrange for the availability of appropriate staff for the system setup, testing, and quality assurance throughout the setup process
- Provide information and data in the formats specified by Accela that will be needed for the GIS implementation.

TASK 12: ACCELA MOBILE DEPLOYMENT

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

- Result inspections/investigations in either store/forward or wireless mode
- Create or Review Record information in the field

TruePoint Responsibilities:

- Create configuration specifications for Accela Mobile Office based on analysis with the Agency
- Configure Accela Mobile Apps

STAGE 5 – READINESS

TASK 13: TRAINING

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

TruePoint can provide on-site or remote training services as desired by the Agency. With COVID-19 we have adapted to remote web training for most of our customers that has been very successful.

In terms of specific training sessions, the following are recommended:

- Accela Civic Platform - Core Team Training – .5 days (SME's and Admins)
- Accela Civic Platform Admin Training – 2 days (System Admin)
- Accela Civic Platform Business Rules Scripting (Basic) – 1 day
- Accela Civic Platform Database Schema Fundamentals – .5 day (report writers)
- Report Workshop Report Training .5 day of workshop training
- Report Workshop Ad-Hoc Report Training 2 (1 hour) remote sessions
- Train the Trainer Training Support 1 days

TruePoint Responsibilities:

- Coordinate with the Agency to define training schedule and coordination.

- Deliver training per the specific requirements listed above.

Agency Responsibilities:

- Select and prepare the power-users who will be participating in the training and subsequently training end users.
- Arrange the time and qualified people for the training who are critical to the project success.
- Provide suitable Agency facilities (this can be remote if necessary) to accommodate various training classes.
- For the Report Workshop agency, will need to provide a local MSSQL environment loaded with a current copy of the configured Data Base.

TASK 14: USER ACCEPTANCE TESTING (UAT) AND GO LIVE PREP

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

TruePoint will provide support for training, oversight, answering questions and addressing issues discovered in User Acceptance Testing. It should be noted that it is critical that the Agency devote ample time and resources to his effort to ensure that the system is operating per signed specifications and ready for the move to production.

TruePoint will aid the Agency by providing User Acceptance Testing (UAT) support and a defined testing process. TruePoint will address and rectify issues discovered during the UAT process as Agency staff executes testing activities.

TruePoint Responsibilities:

- Provide recommendations on testing strategy and best practices.
- Lead the Agency in up to [3] weeks of User Acceptance testing effort and the validation of the system configuration and its readiness to be migrated to production for active use.
- Resolution of issues because of User Acceptance Testing activities.

Agency Responsibilities:

- Make available the appropriate Agency key users and content experts to participate in user acceptance testing as defined and managed by Agency.
- Develop the User Acceptance test scripts.
- Utilize the use cases documented in each Configuration Document Deliverable as the basis for the acceptance of this Deliverable.

STAGE 6 - DEPLOY

TASK 15: PRODUCTION SUPPORT

Production date is defined as the official date in which Accela Civic Platform moves from the test environment to production for daily Agency usage. This date will be agreed to by both TruePoint 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, TruePoint will assist in final data conversions, system validation, staff preparation assistance and training, and coordination of deployment.

TruePoint Responsibilities:

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

Agency Responsibilities:

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

PROJECT TIMELINE

The estimated duration of this project is 6 months.

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

PROJECT SERVICES BUDGET

6 month implementation estimate				
Professional Services Tasks	Hours	Rate	Amount	Description
Project Management	32	\$185.00	\$5,920.00	Project Management for the duration of the project
Agency Setup (SaaS)	4	\$165.00	\$660.00	PROD, SUPP and TEST environments
Configuration Analysis and Prototypes	32	\$165.00	\$5,280.00	Building, Planning, and Engineering 10 users
System Configuration	120	\$165.00	\$19,800.00	Based on Analysis
Business Automation Script Development	32	\$165.00	\$5,280.00	Business Automation Scripts
Data Conversion	0	\$165.00	\$0.00	Permit History is not being converted at this time
Report Creation	32	\$165.00	\$5,280.00	Time for 5 to 10 reports, City will also support the Report creation effort with Accela ad-hoc report writer
Address, Parcel and Owner Import	40	\$165.00	\$6,600.00	Import of Accessor Data or XAPO config
Interface - CSLB integration	4	\$165.00	\$660.00	Using CSLB API
Payment Adaptor	0	\$0.00	\$0.00	Assume using Pay Pal Commerce or Forte built into Accela
Accela Mobile Cloud and APP Setup	24	\$165.00	\$3,960.00	
Accela Citizen Access Configuration	56	\$165.00	\$9,240.00	Assuming City will use Accela standard payment adaptor for Forte, Paypal Commerce, Elavon,
Accela GIS Configuration	32	\$165.00	\$5,280.00	
Training	46	\$185.00	\$8,510.00	Train the Trainer Approach
User Acceptance Testing and Go Live prep	32	\$165.00	\$5,280.00	
Go Live Support	32	\$165.00	\$5,280.00	
Professional Services Totals	518		\$87,030.00	
Travel and Expense				
Not required, if desired expenses will be billed as incurred				
Total Year 1 (Everything but Accela License)			\$87,030.00	

EXPENSES:

TruePoint will plan to perform services remotely. If travel is allowed and required actual amounts of any reasonable and customary travel expenses incurred during the performance of services under this SOW will be billed to Agency. TruePoint will bill Agency for actual expenses incurred for travel and lodging/living, as well as other approved out-of-pocket expenses (such as mileage, parking, tolls, and telecommunications charges). TruePoint will work with Agency to manage and control its expenses and will not incur expenses more than the initial contracted budget below without Agency's prior written consent. Expense receipts will be made available as requested by the Agency.