

# Statement of Work

Prepared for:

San Benito County, CA

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## DOCUMENT CONTROL

Date	Author	Version	Change Reference
March 18, 2016	Gerard McMahon	3.0	

## OVERVIEW

This proposed implementation by Avocette of the Accela products is designed specifically to meet the requirements and budget of San Benito County (Agency"). Avocette is proposing to utilize the Accela Best Practice Template Configuration Implementation Methodology, to promote a successful project that will meet the Agency's objectives. The following Statement of Work will detail how Avocette will implement the software, including the major milestones and deliverables that will ensure your success.

Avocette is committed to providing a superior solution and deployment of the Civic Platform, for the current and future needs of San Benito County. Avocette will work with Agency staff to optimize Accela's portfolio of software, best practices, and customer experience to enable the Agency to successfully deploy the Civic Platform software in the Civic Cloud and meet its functionality, timing and cost requirements. 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 Avocette to San Benito County.

## SERVICES DESCRIPTION

### PURPOSE

The purpose of this document is to detail the specific activities, deliverables, roles and responsibilities, and acceptance criteria that comprise the implementation of the Civic Platform for the Agency, specifically Citizen Access and Civic Platform. Avocette will provide professional services for implementation of the scope and products detailed in the Work Description section detailed henceforth.

### PROJECT TIMELINE

The term of this project is expected to be 12 weeks.

Upon execution of this SOW, the parties will collaborate to determine a start date for Services to be rendered. Upon initiation of these Services, the assigned resources will work with the Agency to collaboratively define a high level, baseline project schedule. Avocette will use the baseline project schedule to plan and schedule resource availability in order to complete the defined scope.

Given the fact that project schedules are working documents that change over the course of the project, Avocette will work closely with Agency to update, monitor, agree, and communicate any modifications. Changes to the baseline project schedule may result in a change in resource availability.

### PROJECT MANAGEMENT

A dedicated project manager will not be assigned for this project. The expectation is that the Agency will manage the project timeline and work with the assigned staff should the timeline require any changes to ensure resource availability.

### CRITICAL SUCCESS FACTORS

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

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- **Knowledge Transfer** – While we cannot guarantee specific expertise for Agency staff as a result of participating in the project, Avocette will make all reasonable efforts to transfer knowledge to the Agency. It is critical that Agency personnel work with Avocette in order to schedule all work in the best manner to facilitate knowledge transfer and resource availability.
- **Dedicated Agency Participation** – We fully understand that Agency staff members have daily responsibilities that will compete with the amount of time that can be dedicated to the implementation project. However, it is critical that the Agency acknowledges that its staff must be actively involved throughout the entire duration of Services as defined in the Project Plan. Avocette will communicate insufficient participation of Agency and Avocette resources to the project sponsor with real and potential impacts to the project timeline.
- **Delivery of Needed Information and Documentation**- In order to guarantee success and meet the timelines and costs described it will be essential that the Agency provide required documentation and information as requested by the delivery staff in timely manner. The expected information required is described in detail in each of the delivery sections. Failure to provide the required information can result in an extension of the project timeline and/or an increase in the scope/cost of the proposed solution.
- **Implementation Methodology** – We offer a successful, proven, implementation methodology which is crucial to the project success. Accela's Civic Platform and customer base is a niche market and as such our implementation methodology may differ from other consulting firms and software packages. It is imperative to project success that the Agency is willing to adhere/adopt to the Methodology and tasks described in this Statement of Work.

### PROJECT ASSUMPTIONS

- Agency and Avocette will review their responsibilities before work begins to ensure that Services can be satisfactorily completed.
- Changes or additions to scope, requested by the Agency may require a Change Order to reimburse Avocette for the additional costs associated with the change.
- Agency will be delivered a monthly summary of expenditures during the term of this project.
- Agency will provide work space for the Delivery Team for work completed on Agency premises if onsite work is needed. We anticipate no more than 1 staff member onsite at any given time.
- Avocette will implement the known features and functions that exist in the current Civic Platform version deployed in the Civic Cloud at the time of the contract signing. Should a new version of the Civic Platform become available during the project implementation, the Agency can request the enhanced features, but it may require a Change Order to reimburse Avocette for the additional cost associated with the change or Agency can implement the enhancement after project go-live.
- Agency will maintain primary responsibility for the scheduling of Agency employees and facilities in support of project activities.
- Agency is responsible for proper desktop hardware/software/network preparation in accordance with Accela specifications.
- Agency will commit to the involvement of key resources and subject matter experts for ongoing participation in all project activities as defined in this SOW. The importance of Agency staff participation is imperative to the successful, and timely, implementation of the project deliverables.

### WORK DESCRIPTION

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

#### DELIVERABLE 1: CIVIC PLATFORM SETUP

Upon Contract signing, Avocette will work with Accela to setup an environment in the Civic Cloud and load the Best Practice Templates for land management, which includes permits and inspections, code enforcement, and planning and zoning into the configuration. Additionally, the environment will be licensed according to the Agency sales order form and will be subject to Accela's Subscription Terms and Conditions.

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

- URL's and login information for each environment

Specifically, Avocette works with Accela to perform the following tasks within the support environment:

- Demonstrate that the Civic Platform is operational by using the valid credentials to log into the Agency's computing environment.
- Setup the software licensing in the Accela cloud per the agreed to sales order form
- Install the Land Management Best Practices Template Configurations
- Setup Bing maps with geocoding and routing
- Setup the mobile applications gateway for use of field applications
- Setup the payment processing gateway for supported vendors. Currently, the Civic Platform inherently supports Official Payments, PayFlow Pro 4.3 (PayPal) and Virtual Merchants.
  - *If the Agency is working with another payment vendor, the Avocette team can scope the level of effort as a separate deliverable item.*

#### Avocette Responsibilities:

- Provide timely and appropriate responses to Agency's request for information.
- Setup the Civic Platform in Accela's Civic Cloud.
- Provide desktop requirements documentation to Agency.
- Update the specific Accela ePayment SDK with the Agency provided merchant account attributes and deliver completed Accela ePayment SDK to Accela IT.
- Demonstrate how to login/logout and view the loaded Best Practice Templates

#### Agency Responsibilities:

- Provide timely and appropriate responses to requests for information by Accela.
- Arrange for the availability of appropriate Agency staff to assist with inquires and activities related to system installation, setup, testing, and quality assurance throughout the setup process.
- Agency staff is responsible to work with the supported payment vendor (Official Payments, PayFlow Pro 4.3 (PayPal) and Virtual Merchant) to collect the necessary information for the payment processing gateway. For example, the staff will need to provide Avocette information such as the Product ID, Convenient Fee values, the Payment gateway URLs and other vital information to successfully implement the payment processing gateway.
- Agency staff must provide supported payment vendor information based on Avocette and San Benito County agreed upon project plan timeline.
- Schedule appropriate Agency staff participants and meeting locations for activities.

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### Acceptance Criteria:

- Confirmation of ability to log into the Civic Platform using the valid credentials

### DELIVERABLE 2: SELF DIRECTED ONLINE TRAINING REQUIREMENTS














The platform includes access to a large library of agency staff administrator and agency end user training materials in Accela's Success Community system, available online and self-paced. Each agency staff user can request login credentials and gain access to the entire library of training materials which include video tutorials, how-to documents and administrator user guides.

Avocette has defined a self-paced, self directed online training program for the San Benito County Accela project team to complete before the project commences. The training program ensures the San Benito County team has the foundational understanding of the Accela software and all of its components.

The program includes:

- 1) Interactive eLessons where participants are prompted for responses or asked to complete exercises inside the learning module
- 2) Video tutorials
- 3) Course Guides (PDF)

Content is organized such that clients can easily navigate through the modules. The following is a sample outline for the Getting Started course:

Subject	Topic	eLesson	Video	Course Guide
<b>Getting Started</b>	<u>Getting Started</u>			
	<u>Logging In and Out</u>			
	<u>Setting Preferences</u>			
	<u>Navigating the User Interface</u>			
	<u>Global Searching</u>			
	<u>Searching for Records</u>			
	<u>Using the My Tasks Portlet</u>			
	<u>Glossary</u>			

It is estimated that each project team member will need to dedicate 40-60 hours over a 3-4 week period to complete the prescribed training, review the provided best practice data sheets and advise Avocette of the configuration changes needed for their system. Hours and duration are estimates only and may vary by Agency.

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The online training content focuses on the administration, maintenance and augmentation of the Civic Platform configuration. Avocette has defined a self-paced / self-directed online training program for the San Benito County's Accela project team to complete before the project commences. The training program ensures your team has the foundational understanding of the Accela software and all of its components. The Agency staff is expected to read and review the online content to better prepare for the instructor lead virtual training.

### DELIVERABLE 3: SET UP OF BEST PRACTICE TEMPLATE CONFIGURATION

The Civic Platform subscription includes turn-key best practice configurations for Land Management. These solutions include all of the record types listed below and other items needed to conduct government business such as data items, inspections and workflow.

Avocette works with Accela resources to set up Best Practice Templates for permits, planning, licensing and code enforcement per the existing data sheets. The following is a list of permit, code enforcement and planning and zoning record types that are included:

#### Permitting and Inspections

Commercial Addition	Commercial Re-Roof	Residential Plumbing	Residential Pool-Spa
Commercial Alteration	Residential Addition	Residential Re-Roof	Temporary Sign
Commercial Demolition	Residential Alteration	Multi-Family Addition	Permanent Sign
Commercial New	Residential Demolition	Multi-Family Alteration	Grading
Commercial Electrical	Residential New	Multi-Family Demolition	Fence Permit
Commercial Mechanical	Residential Electrical	Multi-Family New	Solar Permit
Commercial Plumbing	Residential Mechanical	Commercial Pool-Spa	Street Cut
Right of Way			

#### Code Enforcement

Illegal Sign Violation	Abandoned Vehicle Violation	Working W/O Permit Violation	Home Occupation Violation
Animal Violation	Overgrown Weeds Violation	Garbage Service	Tree Violation
Graffiti Removal	Grading Violation	Junk on Property Violation	Sub-Standard Property Violation
Noise Nuisance	Illegal Occupancy Violation	Vacant Building Violation	Fence Violation

#### Planning and Zoning

Subdivision	Design Review	Pre-Application Meeting	Annexation
Preliminary Map	Variance	Appeal	General Plan Update
Final Map	Rezoning	Time Extension	Specific Plan
Planned Unit Development	Plan Amendment	Modification to Prior Approval	Zoning Text Amendment
Conditional Use	Home Occupation Permit	Confirmation Letter	Lot Line Adjustment
Revocable Permit	Site Plan – Major	Site Plan – Minor	Final Plat
Subdivision – Major	Subdivision - Minor	Preliminary Plat	

#### Code Enforcement

Illegal Sign Violation	Abandoned Vehicle Violation	Working W/O Permit Violation	Home Occupation Violation
Animal Violation	Overgrown Weeds Violation	Garbage Service	Tree Violation
Graffiti Removal	Grading Violation	Junk on Property Violation	Sub-Standard Property Violation
Noise Nuisance	Illegal Occupancy Violation	Vacant Building Violation	Fence Violation



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Specifically Avocette resources will:

- Log into the Agency environment to ensure the best practice configuration is successfully loaded and provide user credentials to Agency, in case Agency staff would like to view loaded configuration
- Provide the Agency with the Best Practice Template Datasheet documents
- Turn off/disable the record types the Agency identifies from the provided datasheets that will not be used during the project implementation, both for Civic Platform and/or for Citizen Access.
- Turn off/disable the data fields the Agency identifies from the provided datasheets that will not be used during the project implementation, both for Civic Platform and/or for Citizen Access

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

### Avocette Responsibilities:

- Provide timely and appropriate responses to Agency's request for information.
- Verify the record types and data fields disabled in environment, based on Agency feedback.

### Agency Responsibilities:

- Provide timely and appropriate responses to Avocette's requests for information.
- Arrange for the availability of appropriate Agency staff to read through the Best Practice Template Datasheet documents. Agency staff must review the datasheet documents and indicate which record types and data fields the project team will disable/turnoff.
- Agency staff must provide record type and data field feedback based on Avocette and San Benito County agreed upon project plan timeline.
- Schedule appropriate Agency staff participants and meeting locations for activities.

### Acceptance Criteria:

- Confirmation of turned off/disabled record types and data fields by logging into Civic Platform with valid credentials.

## **DELIVERABLE 4: SET UP OF AGENCY USERS**

Avocette will setup Agency staff users based on the number of software licenses purchased. Avocette will deliver and discuss the Roles and Functions Matrix document, and the Agency will indicate which user group role each staff is to be assigned. For example, if Agency purchases 10 Land Management Solution licenses, Avocette will setup 10 named staff user login accounts.

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

### Avocette Responsibilities:

- Provide timely and appropriate responses to Agency's request for information.
- Deliver and discuss the Roles and Functions Matrix document
- Create named staff user login accounts and deliver account credentials to Agency

### Agency Responsibilities:

- Provide timely and appropriate responses to Avocette's requests for information.
- Arrange for the availability of appropriate Agency staff to provide a list of Agency user accounts and indicate which user group role the user is to be assigned.
- Agency staff must review the Roles and Functions Matrix with Avocette resource

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- Agency staff must provide list of user accounts and indicate user group role feedback based on Avocette and San Benito County agreed upon project plan timeline
- Schedule appropriate Agency staff participants and meeting locations for activities.

### Acceptance Criteria:

Confirmation of staff user accounts are created by logging into Civic Platform with valid credentials.

## **DELIVERABLE 5: WORKFLOW PROCESS AND INSPECTION GROUP DISTINCT UPDATES**

Avocette will provide up to **forty (40)** distinct updates to the existing workflow processes and up to **forty (40)** distinct updates to the existing inspection groups configured in the deployed Best Practice Templates. Using the Accela Best Practice Template Datasheets, the Agency will indicate which Workflow Process and/or Inspection Groups to update. Distinct workflow process updates include renaming, adding or removing a workflow task or workflow task status result. Distinct inspection group updates include renaming, adding or removing inspection types, inspection status results, checklist items or checklist status results. Each edit, update or removal of a workflow task, workflow status result, inspection type, inspection status result, checklist item or checklist status result is considered a distinct single action change.

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

### Avocette Responsibilities:

- Provide timely and appropriate responses to Agency's request for information.
- Provide the Agency with the Best Practice Template Datasheet documents
- Update the workflow processes and/or inspection groups in the environment, based on the Agency feedback.
- Verify the updated workflow process and/or inspection groups in environment, based on Agency feedback.

### Agency Responsibilities:

- Provide timely and appropriate responses to Avocette's requests for information.
- Staff participants have successfully read and completed the recommended online course content
- Arrange for the availability of appropriate Agency staff to read through the Best Practice Template Datasheet documents.
- Agency staff must provide a list of distinct workflow process and inspection group updates based on Avocette and San Benito County agreed upon project plan timeline
- Agency staff must review and test all workflow processes and inspection groups configuration and provide feedback to Avocette based on the agreed upon project plan timeline
  - *Any additional changes identified during review and testing beyond the scope identified above may be subject to a Change Order request*
- Schedule appropriate Agency staff participants and meeting locations for activities.

### Acceptance Criteria:

- Confirmation of distinct workflow process and inspection group updates by logging into Civic Platform with valid credentials.

## **DELIVERABLE 6: FEE SCHEDULE CONFIGURATION**

The Agency can request up to **eighty (80)** new fee items configured during the project implementation. Avocette will configured unique fee items based on the inherent fee formulas in the Civic Platform, which include flat fees, fees based on a specific range and using fee indicators. Examples include fee calculations based on the number of

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employees for a restaurant or a square footage fee for a building. Advanced fee item setup, such as automating a fee calculation using the advanced script engine logic is an additional cost and Avocette team can scope the level of effort as a separate deliverable item and may result into a Change Order.

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

### Avocette Responsibilities:

- Provide timely and appropriate responses to Agency's request for information.
- Provide the Agency with the Best Practice Template Datasheet documents
- Configure up to 80 new fee items using Agency unique fee descriptions and the inherent Constant fee formula in the Civic Platform, based on Agency feedback
- Verify the new fee items configured in environment, based on Agency feedback.

### Agency Responsibilities:

- Provide timely and appropriate responses to Avocette's requests for information.
- Arrange for the availability of appropriate Agency staff to read through the Best Practice Template Datasheet documents.
- Agency staff must provide a list of the new fee items (up to 80 items) to San Benito County, which include fee description, the fee value amount, should the fee item be automatically invoiced or assessed, which record type(s) the fee item is associated to, and will the fee item be displayed in Citizen Access based on Avocette and San Benito County agreed upon project plan timeline
- Agency staff must review and test all fee items configuration and provide feedback to Avocette based on the agreed upon project plan timeline
  - *Any additional changes identified during review and testing beyond the scope identified above may be subject to a Change Order request*
- Staff participants have successfully read and completed the recommended online course content
- Schedule appropriate Agency staff participants and meeting locations for activities.

### Acceptance Criteria:

- Confirmation of configured fee items by logging into Civic Platform with valid credentials.

## **DELIVERABLE 7: NEW SERVICE RECORD TYPE CONFIGURATION**

Avocette will configure up to **ten (10)** new service record types, not already represented in the Accela Best Practice Templates, such as Elevator Permit or Deck Permit. Avocette will use the existing, preconfigured record components, like workflow process, inspection groups, record status result, fee schedule, document status.

*Note: If Agency requires a new service record type created from scratch, the Avocette team can scope the level of effort as a separate deliverable item and may result in a Change Order request.*

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

### Avocette Responsibilities:

- Provide timely and appropriate responses to Agency's request for information.
- Provide the Agency with the Accela Best Practice Template Datasheet documents
- Configure up to ten (10) new service record types using existing, preconfigured record components, such as workflow process, inspection group, record status result, fee schedule, based on Agency feedback
- Verify the new service record types configured in environment, based on Agency feedback.

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### Agency Responsibilities:

- Provide timely and appropriate responses to Avocette's requests for information.
- Arrange for the availability of appropriate Agency staff to read through the Accela Best Practice Template Datasheet documents.
- Agency staff must provide a list of the new service record types (up to 10) to Avocette, which include record type levels, record name and the applicable record components, like fee schedule, inspection group, workflow process, record ID sequence, available in Citizen Access, document code, record status result, etc., based on Avocette's and San Benito County's agreed upon project plan timeline
- Agency staff must review and test all service record type configuration and provide feedback to Avocette based on the agreed upon project plan timeline
  - *Any additional changes identified during review and testing beyond the scope identified above may be subject to a Change Order request*
- Staff participants have successfully read and completed the recommended online course content
- Schedule appropriate Agency staff participants and meeting locations for activities.

### Acceptance Criteria:

- Confirmation of configured service record types by logging into Civic Platform with valid credentials.

## **DELIVERABLE 8: NEW AGENCY DEFINED DATA FIELDS CONFIGURATION**

The Agency can request up to **thirty (30)** new agency defined data fields configured and associate the data elements to specific record types to ensure information is tracked according to the Agency business process and municipal reports, such as Elevator ID or Roof Color. Avocette will configure each new agency defined data field using one of nine (9) data types: text, date, y/n radio button, number, dropdown list, comment text area, time, money or checkbox.

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

### Avocette Responsibilities:

- Provide timely and appropriate responses to Agency's request for information.
- Provide the Agency with the Best Practice Template Datasheet documents
- Configure up to thirty (30) new agency defined data fields and associate the data elements to the specific record types, based on Agency feedback
- Verify the new agency defined data fields configured in environment, based on Agency feedback.

### Agency Responsibilities:

- Provide timely and appropriate responses to Avocette's requests for information.
- Arrange for the availability of appropriate Agency staff to read through the Best Practice Template Datasheet documents.
- Agency staff must provide a list of the new agency defined data fields (up to 30) to Avocette, which include data field label, data field type, flagged as required, available in Citizen Access, indicate which service record type to associate to, etc., based on Avocette and San Benito County agreed upon project plan timeline
- Agency staff must review and test all agency defined data fields configuration and provide feedback to Avocette based on the agreed upon project plan timeline.
  - *Any additional changes identified during review and testing beyond the scope identified above may be subject to a Change Order request*
- Staff participants have successfully read and completed the recommended online course content.
- Schedule appropriate Agency staff participants and meeting locations for activities.

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### Acceptance Criteria:

- Confirmation of configured agency data fields by logging into Civic Platform with valid credentials.

### **DELIVERABLE 9: EXISTING USER GROUP PERMISSION DISTINCT UPDATES**

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

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

### Avocette Responsibilities:

- Provide timely and appropriate responses to Agency's request for information.
- Deliver and discuss the Roles and Functions Matrix document
- Configure up to ten (10) distinct updates to the existing user group permissions, based on Agency feedback
- Verify the updated user group permissions configured in environment, based on Agency feedback.

### Agency Responsibilities:

- Provide timely and appropriate responses to Avocette's requests for information.
- Arrange for the availability of appropriate Agency staff to read through the Roles and Functions Matrix document.
- Agency staff must provide a list of the user group permission updates (up to 10) to Avocette, which include function name and identified role based on Avocette and San Benito County agreed upon project plan timeline
- Agency staff must review user group configuration and provide feedback to Avocette based on the agreed upon project plan timeline
  - *Any additional changes identified during review and testing beyond the scope identified above may be subject to a Change Order request*
- Staff participants have successfully read and completed the recommended online course content
- Schedule appropriate Agency staff participants and meeting locations for activities.

### Acceptance Criteria:

- Confirmation of configured user group permissions by logging into Civic Platform with valid credentials.

### **DELIVERABLE 10: NEW USER GROUP PERMISSION WITH DISTINCT UPDATE CONFIGURATION**

The Agency can request up to **five (5)** new user group permissions created, by copying or cloning an existing, defined user group deployed from the Best Practice Template with up to **three (3)** distinct updates per new user group permission created, such as add or removal of access for the defined user role. The newly defined user group can be associated to a named staff user account login. For example, if the Agency would like to define a new user role, such as cashier or supervisor, the Avocette will copy/clone an existing user group and create a new role with permission updates if needed. Each permission update, add or removal of access for a defined user role is considered a distinct single action change.

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

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### Avocette Responsibilities:

- Provide timely and appropriate responses to Agency's request for information.
- Deliver and discuss the Roles and Functions Matrix document
- Configure up to **five (5)** new user group permissions by copying/cloning existing user groups deployed from Best Practice Template with up to **three (3)** distinct updates per new user group role created, based on Agency feedback
- Verify the new user group permissions configured in environment, based on Agency feedback.

### Agency Responsibilities:

- Provide timely and appropriate responses to Avocette's requests for information.
- Arrange for the availability of appropriate Agency staff to read through the Roles and Functions Matrix document.
- Agency staff must provide a list of the new user group permissions (up to 5) and the permission updates (up to 3) to Avocette, which include name of new user group role, which user group to copy, the function names to update based on Avocette and San Benito County agreed upon project plan timeline
- Agency staff must review user group permission configuration and provide feedback to Avocette based on the agreed upon project plan timeline
  - *Any additional changes identified during review and testing beyond the scope identified above may be subject to a Change Order request*
- Staff participants have successfully read and completed the recommended online course content
- Schedule appropriate Agency staff participants and meeting locations for activities.

### Acceptance Criteria:

- Confirmation of configured user group permissions by logging into Civic Platform with valid credentials.

## **DELIVERABLE 11: CITIZEN ACCESS CONFIGURATION**

This deliverable includes setup and configuration of the Agency municipal website branding, the online payment processing gateway for the supported payment vendors (Official Payments, PayFlow Pro 4.3 (PayPal) and Virtual Merchant for Citizen Access, and up to **ten (10)** distinct updates to the citizen portal pages to make the pages more in line with the Agency processes per the best practice configurations. Distinct updates to the citizen portal pages include, adding a pageflow component, like attachments to an existing defined pageflow setup, updating the section instructional text with agency language, including descriptive help instructions for specific agency defined data fields, or updating the online disclaimer text. Each update to the citizen portals and sections are considered a single action change.

*Note: If the Agency is working with another payment vendor, the Avocette team can scope the level of effort as a separate deliverable item and may result in a Change Order request.*

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

### Avocette Responsibilities:

- Provide timely and appropriate responses to Agency's request for information.
- Setup Citizen Access branding by loading two (2) banner files provided by the Agency
- Setup supported payment gateway with merchant account information
- Setup the payment processing gateway for supported vendors. Currently, the Civic Platform inherently supports Official Payments, PayFlow Pro 4.3 (PayPal) and Virtual Merchants.
- Configure up to ten (10) distinct updates to the citizen portal pages, based on Agency feedback

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- Verify the loaded citizen access branding, citizen portal pages and sections updated and payment acceptance in environment, based on Agency feedback.

### Agency Responsibilities:

- Provide timely and appropriate responses to Avocette's requests for information.
- Provide website branding files, which include the top and side banner
- Arrange for the availability of appropriate Agency staff to review the branding on Citizen Access
- Agency staff is responsible to work with the supported payment vendor (Official Payments, PayFlow Pro 4.3 (PayPal) and Virtual Merchant) to collect the necessary information for the payment processing gateway. For example, the staff will need to provide the Avocette information such as the Product ID, Convenient Fee values, the Payment gateway URLs and other vital information to successfully implement the payment processing gateway.
- Agency staff must provide web branding, a list of distinct updates (up to 10) and supported payment vendor information based on Avocette and San Benito County agreed upon project plan timeline.
- Agency staff must review and test all Citizen Access configuration and provide feedback to Avocette based on the agreed upon project plan timeline
  - *Any additional changes identified during review and testing beyond the scope identified above may be subject to a Change Order request*
- Staff participants have successfully read and completed the recommended online course content
- Schedule appropriate Agency staff participants and meeting locations for activities.

### Acceptance Criteria:

- Demonstration of the operational Citizen Access functionality such as login/logout, the updated citizen portal pages and sections, and payment acceptance

## DELIVERABLE 12: PROPERTY DATA UPLOAD

Avocette will provide an initial, one-time load of the Agency reference property data set. This means, that upon go live and when the data is provided by the agency, staff will have an initial reference property data set loaded in the system ready for use, with updates to that data handled by Agency staff using Accela screens. When changes occur regarding property, such as ownership changes or a new set of addresses are added to the agency, staff would manually enter those changes directly within the solution. The Agency must provide the valid property data set in the acceptable pipe delimited text file format. The conversion effort will occur a maximum of **three (3)** times.

### Avocette Responsibilities:

- Provide timely and appropriate responses to Agency's request for information.
- Convert the provided acceptable pipe delimited text file format into Civic Platform, maximum of up to 3 times.
- Provide and explain the Accela APO Conversion Guide document

### Agency Responsibilities:

- Provide timely and appropriate responses to Avocette's requests for information.
- Arrange for the availability of appropriate Agency staff to review the Accela APO Conversion Guide document
- Provide property data in acceptable pipe delimited text file format
- Agency staff must review property data conversion and provide feedback to Avocette based on the agreed upon project plan timeline
  - *Staff have a total of two (2) times to review and make the necessary changes/updates to the converted property data. The third property data conversion will be the final conversion effort before the go-live promotion to the production environment.*

## Statement of Work

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- Schedule appropriate Agency staff participants and meeting locations for activities.

### Acceptance Criteria:

- Successfully search for and retrieve loaded Address Parcel and Owner information by logging into the Civic Platform with valid credentials

## DELIVERABLE 13: LICENSED PROFESSIONAL DATA UPLOAD

Avocette will provide an initial, one-time load of the Agency reference licensed professional data set. This means, that upon go live and when the data is provided by the agency, staff will have an initial reference licensed professional data set loaded in the system ready for use, with updates to that data handled by Agency staff using Accela screens. When changes occur regarding licensed professional information, such as name changes or a new address, staff would manually enter those changes directly within the solution. The Agency must provide the valid licensed professional data set in the acceptable pipe delimited text file format. The conversion effort will occur a maximum of **three (3)** times.

### Avocette Responsibilities:

- Provide timely and appropriate responses to Agency's request for information.
- Convert the provided acceptable pipe delimited text file format into Civic Platform, maximum of up to 3 times.
- Provide and explain the Accela Licensed Professional Conversion Guide document

### Agency Responsibilities:

- Provide timely and appropriate responses to Avocette's requests for information.
- Arrange for the availability of appropriate Agency staff to review the Accela Licensed Professional Conversion Guide document
- Provide property data in acceptable pipe delimited text file format
- Agency staff must review property data conversion and provide feedback to Avocette based on the agreed upon project plan timeline
  - *Staff have a total of two (2) times to review and make the necessary changes/updates to the converted licensed professional data. The third licensed professional data conversion will be the final conversion effort before the go-live promotion to the production environment.*
- Schedule appropriate Agency staff participants and meeting locations for activities.

### Acceptance Criteria:

- Successfully search for and retrieve loaded Licensed Professional information by logging into the Civic Platform with valid credentials

## DELIVERABLE 14: EXPRESS HISTORICAL DATA CONVERSION

Avocette will provide an initial, one-time load of the Agency historical, legacy transaction record types, such as completed permits, completed applications or closed violation incidents. The Avocette will provide and explain the Express Historical Data Conversion Document which details the data conversion process, the required data source format of pipe delimited text file format, and resulting data properties. The conversion effort will occur a maximum of **three (3)** times.

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



## Statement of Work

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- Historic completed permits are to be converted into a single record in the Civic Platform called "Historic". A single historic record can be available per module implemented, with the following data populated when provided:
  - Base record information such as permit number, work description, date opened, date closed
  - Record based data items
  - Transactional property and people, including Addresses, Parcels, Owners, Licensed Professionals, and Contacts
  - Inspection History
  - Total invoiced, total paid, and balance

All other historic data is not converted, examples include reference people and property and relationships of those items to records, workflow and history, detailed fees and payment.

### Avocette Responsibilities:

- Provide timely and appropriate responses to Agency's request for information.
- Convert the provided acceptable pipe delimited text file format into Civic Platform, maximum of up to 3 times.
- Provide and explain the Express Historical Data Conversion Document

### Agency Responsibilities:

- Provide timely and appropriate responses to Avocette's requests for information.
- Arrange for the availability of appropriate Agency staff to review the Express Historical Data Conversion document
- Provide historical data in acceptable pipe delimited text file format
- In process permits are to be entered manually into Civic Platform or finished in current system before cut off of last conversion effort. Only completed and/or closed service records will be converted.
- Agency staff must review and test historical transaction conversion and provide feedback to Avocette based on the agreed upon project plan timeline
  - *Staff have a total of two (2) times to review and make the necessary changes/updates to the converted historical data. The third historical data conversion will be the final conversion effort before the go-live promotion to the production environment.*
- Schedule appropriate Agency staff participants and meeting locations for activities.

### Acceptance Criteria:

- Historical data has been converted to Civic Platform in a single record type according to the Express Historical Data Conversion Document.

## **DELIVERABLE 15: CIVIC PLATFORM DAILY END USER TRAINING**

Avocette will provide instructor lead training via WebEx engagement for Agency staff that focuses on the daily end user activities, such as basic software navigation, record creation and updates, workflow progression, fee invoicing, processing payments, scheduling and resulting inspections. The aim is to educate Agency resources on how to successfully process a record (permit, license or work order).

Avocette will focus the training on what the Agency normally does operationally, the services that take up the majority of the Agency staff time. Therefore, the Agency will select 2 – 4 record processes and Avocette will focus the training on the selected record types. The Agency staff can read and review the online content to better prepare for the instructor lead training. <https://accela.force.com/success/articles/Training/Training-Daily-User-Index?popup=true>

## Statement of Work

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*Note: If the Agency would like additional training, the Avocette team can scope the level of effort as a separate deliverable item and may result in a Change Order request.*

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

- Access to Accela Success Community online training content
- Instructor lead Civic Platform Daily End User Training (agenda provided) via WebEx engagement
- Avocette will focus training content on the 2 – 4 record processes selected by the Agency

### Avocette Responsibilities:

- Provide timely and appropriate responses to Agency's requests for information.
- Provide Agency the Accela Success Community website, provide instruction on how to register and login, along with how to search for and find the online training content.
- Coordinate with Agency and schedule the appropriate day/time to deliver the Civic Platform Daily End User Training content outlined in the provided agenda.
- Provide Civic Platform Daily End User Training Agenda training content and focus on the 2 – 4 record processes mutually agreed upon
- Provide Agency the WebEx engagement information for the Civic Platform Daily End User training.

### Agency Responsibilities:

- Provide timely and appropriate responses to Avocette requests for information.
- Provide the Accela Success Community website to the staff users who will require the online training content.
- Identify and provide specific Agency procedural details on 2 – 4 record processes in which Avocette will teach for the instructor lead training session.
- Ensure that users are proficient in using PC's as a prerequisite before accessing the online training content.
- Ensure that users are familiar with use of standard Internet browsers as a prerequisite for the course.
- Ensure that users have appropriate hardware/software for successfully viewing online video content.
- Ensure that users are successfully reading and completing the recommended online course content throughout project implementation.
- Schedule appropriate Agency staff participants and meeting locations for training activities.

### Acceptance Criteria:

- Access Accela Success Community online training
- Deliver the Civic Platform Daily End User Training (agenda provided)

## **DELIVERABLE 16 : ESRI MAP INTEGRATION SETUP**

Avocette will configure Accela GIS to link and leverage existing San Benito County GIS information, including an integration to Citizen Access, the Civic Platform back office and the mobile.

The following are the use cases supported after setup:

- Look up non-historic permit information and parcel information from the Civic Platform
- Provide geographic view of all agency-provided layers such as land-use, zoning and infrastructure information layers
- Select one or more parcels and add new applications, permits or cases

## Statement of Work

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The property information (address, parcel and owner data) must be provided by agency and loaded into Civic Platform, either by data conversion load or external (XAPO) published map service, for reference object linking to support the use cases detailed above.

During Accela GIS integration setup, San Benito County will ensure components for ArcGIS Server or ArcGIS Online are installed and accessible to the Civic Platform including Citizen Access, back office and mobile apps. Avocette will validate the proper installation and configuration of the Accela GIS environment.

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

- An Accela GIS integration to Citizen Access, back office and mobile apps

### Avocette Responsibilities:

- Provide timely and appropriate responses to Agency's request for information
- Avocette will perform quality assurance checks on the configuration and performance based on acceptance criteria mutually developed by Avocette and San Benito County
- Configure the DEFAULT user group with the standard map command functions and map settings
- Verify that the Accela GIS applications are operational in the Agency computing environment thus communicating with the Civic Platform system

### Agency Responsibilities:

- Provide timely and appropriate responses to Avocette request for information
- Arrange for the availability of appropriate staff for the system testing, and quality assurance throughout the process
- Ensure components for ArcGIS Server or ArcGIS Online are installed and accessible to the Civic Platform
- Provide Avocette the valid ESRI user and password credentials
- Provide information and data in the formats specified by Avocette that will be needed for the Accela GIS implementation

### Acceptance Criteria:

- Verify an operating Accela GIS in test environment

## COST SCHEDULE

All Services fees are invoiced upon commencing the project. The pricing described below is exclusive of taxes and expenses. The price is based on the information available at the time of signing and the assumptions, dependencies and constraints, and roles and responsibilities of the Parties, as stated in this SOW. Should there be changes to the scope, timeline or resources that increases the hours or costs needed to complete the project, a Change Order may be required prior for project continuation. Please see Change Order details below.

Avocette will endeavor not to exceed the total estimate amount without the prior approval of Customer. Avocette has the right to refuse to work additional hours should there be no remaining estimated hours and no Change Order delineating additional hours.

## Statement of Work

Premium Package	Price
AA System Setup	\$41,800
Setup of Land Management best practice configurations	
Setup of Agency Staff User Accounts	
Workflow and Inspection Distinct Updates	
Fee Schedule Configuration	
New Service Record Types	
New Agency Defined Data Fields	
User Group Permission Distinct Updates	
New User Group Permission with Distinct Updates	
Citizen Access Configuration	
Property Data Upload	
Licensed Professional Data Upload	
Express Historical Data Conversion	
ESRI Map integration setup	
Citizen Access Configuration	
Online & Webex Training	

### FIXED FEE PREPAID LANGUAGE

Avocette will perform the Services list in the SOW on a pre-paid basis. The SOW lists the nature and scope of the Services and associated Deliverables currently understood to be part of the project, the expected staffing requirements, project schedule, Avocette's and Customer's roles and responsibilities and the other assumptions set forth. Avocette's total price to perform the Listed Services and provide the Deliverables described is \$41,800 US exclusive of taxes and expenses (the "Fixed-Fee"). The Fixed-Fee price is based on the information available at the time of signing and the assumptions, dependencies and constraints, and roles and responsibilities of the Parties, as stated in this SOW. The Fixed-Fee price will be invoiced upon contract signing.

### TIME AND MATERIALS FOR ADDITIONAL APO CONFIGURATION & DATA MIGRATION

Avocette has identified areas that require further investigation related to APO Configuration and Data Migration which has the potential for added labor & resource costs. There are a number of variables that impact the costing for this added work - Specifically, the integrity of the data, existing database structure, the data being converted needs to be delivered in a pipe delimited format, either by the Agency (San Benito) or with the assistance of Avocette tech resources. We will require San Benito's active participation in the data mapping process to ensure successful conversion.

Additionally, the Address Parcel Owner (APO) data needs to be delivered in the correct format for the Property Data Load in order to have the identified parcels in the system; Otherwise, the input of parcels becomes a manual process, and cost for time & materials is subject to the volume of professional services dedicated by Avocette to complete the work.

Without further investigation and scoping of the requirements at the time of Statement of Work issuance – *these items remain outstanding from the cost schedule, and will likely necessitate a Change Order for the work to be completed; In this event, the additional work will be conducted at a rate of \$160/per Hour. Below is a preliminary estimate of potential added cost related to x-APO configuration and Data Migration and does not represent a validated quote for added work*

## Statement of Work

potential added cost related to x-APO configuration and Data Migration and does not represent a validated quote for added work

### Estimated Optional Add-Ons

External Property Data Integration-xApo (22 Hrs)	\$ 3,520.00
Extended Data Cleansing-Formatting (20 Hrs)	\$3,200.00

### EXPENSES:

Actual amounts of any reasonable and customary travel expenses incurred during the performance of services under this SOW will be billed to Agency, according to Avocette expense policy. Avocette will bill Customer 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). Avocette will work with Customer to manage and control its expenses in accordance with Avocette travel policy guidelines and will not incur expenses in excess of the initial contracted budget below without Customer's prior written consent. Expense receipts will be made available as requested by Agency. Total estimated expenses are based on past engagement experience.

Based on the assumption that there will only need to be 3 onsite days at an estimated \$2000 each, the travel expense budget estimate is \$6000.00 US.

### Acceptance:

Accepted By:

Avocette



Authorized Signature

Mitchell Ngai

Name - Type or Print

COO

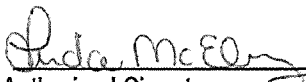
Title

June 1, 2016

Date

Accepted By:

San Benito County, CA



Authorized Signature

Linda McElroy

Name - Type or Print

Admin Sys. Manager

Title

5-31-16

Date

