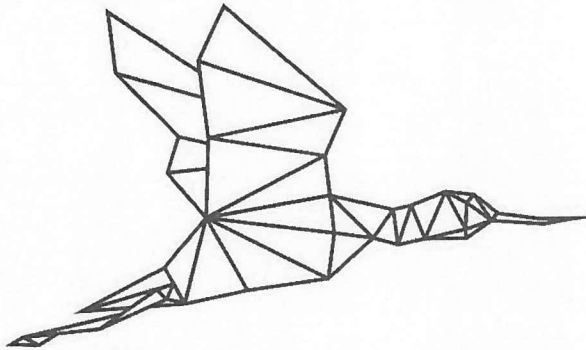


# Avocette

TECHNOLOGY TOGETHER

---

**SAN BENITO COUNTY**  
Supplemental Statement of Work  
Date: February 10<sup>th</sup>, 2017



**Response contact:**

---

Name: Gerard McMahon  
Title: Business Development Lead  
Company: Avocette Technologies  
Address: #202 Sixth Street  
New Westminster, BC V3L 3C2

V: 604-395-6000 ext.241  
C: 604-505-3380  
E: [gerard.mcmahon@avocette.com](mailto:gerard.mcmahon@avocette.com)

**Prepared for:**

---

Name: Louie Valdez  
Title: Management Analyst III  
Company: San Benito County  
Address: 481 Fourth Street  
Hollister, CA 95023

V: 831-636-4000 ext.18  
F: 831-636-4010  
E: [lvaldez@cosb.us](mailto:lvaldez@cosb.us)



**Attn: San Benito County - Administrative Services & Planning Department**

Please find enclosed Supplemental Statement of Work for Avocette Technologies Professional Services

The quotation is related to the final implementation and configuration of outstanding items not included in the integration of Accela Civic Platform Best Practice Template. We are eager to assist you in bringing this project to completion in a timely manner.

As of February 10<sup>th</sup>, 2017 the initial install of Accela Civic Platform is 75% to completion with significant gaps in agency self-directed online training (40% of modules completed) fee configuration setup (20% completed) and Citizen Access Portal configuration updates (20% completed). I am confident with renewed focus on the project and dedication of your agency resources we can be fully deployed within 120 days (by the end of June) from submission of this quote.

We will execute the balance of the work on a straight Time & Materials basis at the preferred rate of \$135/per hour for the full range of our Professional Services (which represents a savings of \$15-\$75/per hour based on the resources/discipline required for a given task) The scope of this quotation pertains to the implementation of outstanding Fee Updates (65) and the Fee Updates that require Automation (7) as well as, configuration of an interface with the County's Finance & Admin software (New World).

Additionally, completion of the final phase(s) of the implementation will require a dedicated Avocette Project Manager for oversight and coordination of resources. Lastly, I have incorporated 4 days of Avocette Instructor-Led Webex Training for Administrators and End-Users of the system to ensure Knowledge Transfer and Adoption of the platform to empower your staff while fully leveraging the technology to drive overall efficiency and citizen engagement.

I appreciate your consideration, and look forward to working with the County towards successful deployment of the Accela Civic Platform.

Sincerely,

**Gerard McMahon**

Business Development Lead

+ office 604.395.6000 ext.241

+ mobile 604.505-3380

**Avocette**  
TECHNOLOGY TOGETHER



## Deliverable 1: Implementation of 65 Additional Fees & 7 Fee Updates with Automation

Avocette will configure sixty five (65) total outstanding fee items that were not inclusive of the Best Practice Templates during initial phase of implementation. Avocette will configure all fee items using the inherent fee formulas in the Civic Platform. Advanced fee item setup of seven (7) updates with automation of fee calculation using the advanced scripting.

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.
- Configure sixty five (65) new fee items, using Agency unique fee descriptions
- Automation of seven (7) fee updates with associated fee formulas & calculations
- 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 Accela Best Practice Template Datasheet documents.
- Agency staff must provide a list of the new fee items (up to 65 items) to Avocette, 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's 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*

### Acceptance Criteria:

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



## Deliverable 2: Interface Configuration of New World Financial & Accela Civic Platform

For this interface, the Avocette technical lead will work together with County's technical lead and/or business leads to document functional requirements and technical specifications to draft an Interface Specifications Document. Interface development begins upon written approval of the specifications. It is expected that this interface will use a batch engine that extracts data from the Accela Platform and creates a flat file for consumption by the New World system. The importation of the flat file into New World will be the responsibility of the agency. 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.

San Benito's responsibilities include obtaining permission for level/type of integration from appropriate application owners (including on premises or cloud/hosted, etc.). The County will also ensure Avocette resources have access to a Development or Test version of the 3<sup>rd</sup> party system for interface development and unit testing if required. The interface will be developed against 1 (one), agreed upon version of the 3<sup>rd</sup> party system. Avocette will conduct Analysis and Development for the system to be interfaced with Accela within the scope of this implementation.

### 2.1 Interface Analysis

In order to determine the County requirements for the New World interface, an analysis session will be conducted as a part of this deliverable. The findings will then be documented in the Interface Specifications Document(s) for use by Avocette in building the interface code. The implementation of the interface is dependent on the assistance of the County's staff, specifically, interface analysis, data mapping, and data manipulation as required in the source system.

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

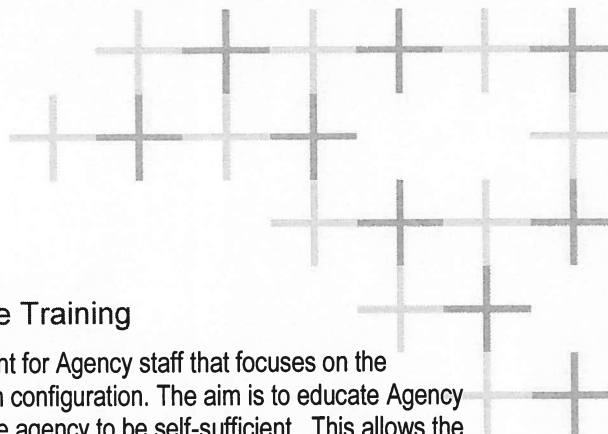
- Interface Specification Document(s)
- Data extract batch job and associated flat file based on the agency approved specification

#### Avocette Responsibilities:

- Provide timely and appropriate responses to the San Benito's request for information
- Conduct Interface Analysis sessions
- Work with the County staff to develop interface specifications document
- Create and unit test the batch job and file creation

#### Agency Responsibilities:

- Provide timely and appropriate responses to Avocette's request for information
- Provide system and access to individuals to provide required details of system interface
- 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.



### Deliverable 3: Civic Platform Webex Administrative Training

Avocette will provide instructor lead training via WebEx engagement for Agency staff that focuses on the administration, maintenance and augmentation of its Civic Platform configuration. The aim is to educate Agency resources on aspects of the Civic Platform in an effort to enable the agency to be 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.

*Note: If the Agency would like additional onsite 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 Administrative Training via WebEx engagement

#### Avocette Responsibilities:

- Provide timely and appropriate responses to Agency's request 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 Administrative Training
- Provide Agency the WebEx engagement information for the Civic Platform Administrative training
- Conduct 2 days of instructor led WebEx Administrative 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.
- 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 have successfully completed the recommended online course content prior to the instructor led session..
- Schedule appropriate Agency staff participants and meeting locations for training activities.

#### Acceptance Criteria:

- Access Accela Success Community online training
- Deliver the Civic Platform Administrative Training



## Deliverable 4: Civic Platform Daily End User Webex 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 dedicated to Land Management (Permitting/Code Enforcement) workflow progression, fee invoicing, processing payments, scheduling and resulting inspections.

Additionally, Avocette will provide instructor lead training via Webex dedicated to Licensing processes and workflow. The aim is to educate the County's team 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. Avocette will work with the Agency to identify 2-4 record types that will be covered in trainings.

*Note: If the Agency would like additional onsite 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
- 2 days of Instructor lead Civic Platform Land Management Daily End User Training via WebEx engagement
- Avocette will focus training content on the 2 – 4 record processes selected.

### 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 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 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



## COST SCHEDULE – HOURLY TIME AND MATERIALS

Avocette will perform the Services below based on the deliverables outlined in this SOW on an hourly time and materials basis (\$135 per hour). Based on the description of the services we are providing a budget/planning estimate for the County as detailed below.

Avocette will invoice the customer every 30 days after the signing of the SOW, based on time and materials executed and accepted by San Benito County. Invoices are due net 30 of the invoice date.

Cost Schedule	Price
Configuration of 65 Fee Updates (22 Hours Allocated)	
Configuration of 7 Fee Automations (21 Hours Allocated)	
Interface of New World Financial (48 Hours Allocated)	
Admin & End-User Training via Webex (40 Hours)	
Project Management (30 Hours Allocated)	
<b>TOTAL QUOTED HOURS: 161 @ \$135/PER HOUR</b>	<b>\$21,735.00</b>

### CHANGE TO AGREED TO SCOPE

The estimate above 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 estimated hours needed to complete the project, a Change Order may be issued to document the increase in scope or costs. Avocette will endeavor not to exceed the total estimate and will provide regular project budget reports to the County.

### CHANGE TO AGREED TO SCOPE

The estimate above 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 estimated hours needed to complete the project, a Change Order may be issued to document the increase in scope or costs. Avocette will endeavor not to exceed the total estimate and will provide regular project budget reports to the County.



## Services Description

### Purpose

The purpose of this document is to detail the specific activities, deliverables, roles and responsibilities, and acceptance criteria that comprise San Benito County's requested implementation resources detailed herein. Avocette will provide professional services to fulfill the County's technical criteria.

### PROJECT TIMELINE

The term of this project is 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 be assigned by Avocette to provide oversight, expedite delivery, and coordinate resources to complete the project in the most efficient/effective means possible. The Project Manager will interact with Agency & Avocette personnel on a weekly basis (approximately 2.5hrs/per week) for the 12 week duration of the work outlined in this SOW upto 30 hours.

### Acceptance:

Accepted By:

Accepted By:

#### Avocette Technologies

#### San Benito County

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

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

\_\_\_\_\_  
Name - Type or Print

\_\_\_\_\_  
Name - Type or Print

\_\_\_\_\_  
Title

\_\_\_\_\_  
Title

\_\_\_\_\_  
Date

\_\_\_\_\_  
Date

**APPROVED AS TO LEGAL FORM  
SAN BENITO COUNTY COUNSEL**

*Shirley L. Murphy* 2/15/17  
**DEPUTY COUNTY COUNSEL DATE**