

**TO:** Thomas Frutchey, City Manager

**FROM:** Warren Frace, Community Development Director  
Dave McCue, Information Technology Manager

**SUBJECT:** Authorization for City Manager to Execute Contracts and Budget Transfers in the amount of \$558,000 for Purchase and Installation of a replacement Land Management System ("Building Permit System") from Accela Inc. for the Community Development and Public Works Departments

**DATE:** September 20, 2016

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**NEED:** For the City Council to consider authorizing the purchase and installation of a new Land Management System (LMS) ("Building Permit System").

**FACTS:**

1. The City currently uses Permits Plus as its building permitting (LMS) software which was purchased in 1998 and has received no maintenance support since 2005.
2. The LMS software is outdated and does not provide for workflow automation, the ability to extract information efficiently, time tracking or the ability to communicate among Departments.
3. In August of 2014, Council adopted a Resolution No. 14-111, directing Staff to implement "cost per hour" billing for plan review inspection services at an hourly rate.
4. The existing LMS software does not allow for tracking of staff time and billing based on real-time hours, therefore staff's ability to implement Council Policy has been limited to date.
5. Efficiently implementing "cost per hour" billing, without creating additional work for staff, will require an upgrade of the current LMS software.
6. While still in service; the LMS software is functionally obsolete and is no longer supported by the manufacturer.
7. The Permits Plus database has approximately 100,000 staff hours of data, worth millions of dollars that needs to be transferred to the new system.
8. A needs assessment was prepared by NexLevel Consulting in conjunction with Community Development, Public Works, Emergency Services, Police and I.T. to determine existing deficiencies and desired functions with a new LMS.

9. NexLevel's Needs Assessment Report (Attachment 1) identified the following:

**Current LMS Deficiencies**

- a) The system software is functional obsolete and no longer supported by the publisher.
- b) The current system necessitates extraordinary manual data extraction and verification, use of off-system spreadsheets/workaround(s), and is extremely difficult to do any kind of reporting or research
- c) The current system only allows working on one permit at a time. To view or edit another permit, you must close the current permit.
- d) System cannot split Development Impact Fees for a permit based on multiple uses / occupancies. This limits flexibility and requires time consuming work arounds for unique building permits.
- e) Planning, Storm Water Management, Industrial Waste discharge management and Code Enforcement are not able to use the current system so they keep independent records in Outlook, QuickBooks, spreadsheets and documents.
- f) There is currently no ability to collaborate information between departments.
- g) Inspectors, field staff and officers are not able to view or modify records away from their desk.
- h) The system does not have the ability to track or bill for staff time.
- i) There is no GIS integration or automatic updating of APN ownership information.
- j) Property owner noticing must be done with alternative software using a manual process.

**Desired Functions of a New LMS**

- a) Promotes Transparency by providing simple access to government data. Allowing for permit review and inspection status to be accessed by the public and development community via an online portal.
- b) Provide for integration between City functions including Community Development, Public Works, Code Enforcement and Administrative Services. Providing the ability to transfer billing information directly to the Munis finance system as well as being able to view code enforcement cases or permit history tied to addresses.

- c) Ability to convert and transfer the existing Permits Plus database into the new system.
- d) Strong mobility features, including the ability to upload inspection results from the field, to "the Cloud." Inspection results will be available to staff and the development community in real time, via an online portal.
- e) Has the ability to easily extract data to report permit history, trend lines and productivity.
- f) Allow for the additional modules to manage land use and sign permits, as well as to track Code Enforcement cases.
- g) Ability to track and bill staff time for individual permits.
- h) Automated plan check routing and tracking.
- i) Robust report and permit tracking functions.
- j) Electronic plan check capabilities.
- k) Interface with City GIS to accurately identify and reference project locations

#### **ANALYSIS &**

**CONCLUSION:** The current LMS is almost 18 years old and is no longer sold or supported by the vendor. It is deficient in most areas or completely lacking the necessary modules.

In June 2015, the City contracted with NexLevel Information Technology, Inc. to conduct a needs assessment for a new land management system. A copy of the final Needs Assessment Report is attached as Attachment 1. Multiple City departments were interviewed by NexLevel to determine what needs the software should meet.

In November 2015, the City issued a Request for Proposals (RFP) for a new LMS, and six proposals were received. After reviewing the proposals, the field was narrowed to three firms.

- Accela Inc. / TruePoint Solutions
- Sungard Public Sector
- Tyler Technologies

In early March, 2016, each of the three firms then participated in a day long Proof of Capabilities session before City staff and NexLevel. The Proof of

Capabilities process required each firm to demonstrate their software features and functionality utilizing information specified by the City. The result of the Proof of Capabilities process was the staff evaluation team's unanimous selection of Accela Inc. Civic Platform as its top choice.



March 11, 2016 - Proof of Capabilities Demonstration – Paso Robles City Hall

Staff then reached out to other cities presently using Accela's LMS software for reference checks. In April, City staff visited the City of Palo Alto, which utilizes many Accela software products, to hear from their staff who use the system and see it in action. After review of the submissions, onsite demonstrations and reference checking, staff is confident Accela's software is the optimum LMS product for the City of Paso Robles.

Accela's Civic Platform provides the most functionality and integration and is installed in virtually all U.S. states, as well as in Canada, Puerto Rico, Australia, New Zealand, and the United Arab Emirates. Throughout its 34-year history, Accela has served over 2,000 separate agencies and thousands of their departments with our Civic Platform, including agencies that range in size from Nogales, AZ to the State of California.

The Accela software would be installed by a separate contractor TruePoint Solutions. TruePoint's work will include transferring the existing Permits Plus database and working with staff on the design and implementation of the new system.

The City's GIS mapping program will need to be updated to a GIS server platform which will require a separate contractor, VESTRA Enterprise GIS.



April 7, 2016 - City Staff Site Visit to City of Palo Alto– Accela Reference Check

Accela's Civic Platform, not only addresses limitations of the current LMS, but provides many new features that will improve the City's permit processing, customer service and revenue collection (see Attachments 2 and 3).

- Accela Civic Platform is the backbone for all land use and community development activities ranging from addressing, planning entitlements, building permits, plan checking, inspections, code enforcement, and stormwater management. The software provides specific features for automating the dozens of steps involved with permitting.
- Citizen Access, the public facing web portal, substantially reduces the need for counter operations and provides 24 hour online and telephone access to government operations.
- Integrated GIS capabilities delivers mapping and functionality to all staff users. This overlays government data onto Bing and GIS maps, and allows customers to initiate and manage a variety of activities from a geospatial platform.
- Mobile Extensions enhance system accessibility options for staff by extending permit tracking software capabilities to the field.
- Accela and its installation subcontractor TruePoint clearly understood what is necessary to convert the existing permit database from Permits Plus both in its complexity and what was required of the vendor.

The project is scheduled to begin in September 2016 with a 15- to 18-month implementation timeline.

In addition to utilizing backfill staff with this assignment, the city will use contracted project management to employ specific professional skills for a limited time.

**POLICY**

**REFERENCE:** Building Permit Software City Council Resolution No. 14-111  
Information Systems Strategic Plan

**FISCAL**

**IMPACT:** The City charges a 5% Building Permit Automation Fee to cover the cost of software replacement, enhancements and updates which will pay for most of this project. Replacement of the LMS has been planned for many years and the necessary funding has been collected and appropriated in the budget. No use of reserves is necessary. Enterprise funds will cover the cost of their respective users. The current cost estimate for a new LMS, which includes the license fee, implementation costs, hardware costs, etc., is approximately \$558,000 for FY 16 and 17.

**OPTIONS:**

- a. Council to approve purchase of a new LMS software system by approving draft Resolution A authorizing the following:
  1. City Manager to enter into a contract with Accela for the purchase and implementation of its Civic Platform.
  2. City Manager to enter into a contract with TruePoint Solutions for the implementation, conversion and training of Civic Platform.
  3. City Manager to enter into a contract with NexLevel Inc. for project management services.
  4. City Manager to enter into a contract with VESTRA for the implementation, migration and training of ESRI GIS Server.
  5. City Manager to approve "backfill" staffing to assist the implementation of the LMS.
  6. City Manager to adjust/amend any and all contracts as further details become evident, for the benefit of the City.
  7. City Manager to authorize the Information Technology Manager to purchase the necessary software and hardware for the implementation of the LMS.
  8. Total project cost not to exceed \$558,000.
- b. Amend the above option.
- c. Refer back to staff for additional analysis.
- d. Take no action

**ATTACHMENTS:**

1. Summary of Cost and Funding
2. Draft Resolution A - Authorization for City Manager to Execute Contracts and Budget Transfers in the amount of \$558,000 for Purchase and Installation of a replacement Land Management System ("Building Permit System") from Accela Inc.
3. NexLevel - Paso Robles Needs Assessment Report – Aug 31, 2015
4. NexLevel – Accela Features / Functionality Standouts – Mar 15, 2016
5. Accela Inc. - LMS Proposal – Jan 8, 2015
6. Accela – Best and Final Offer – Aug 8, 2016
7. TruePoint – Scope of Work – Jun 20, 2016
8. VESTRA's Proposal to the City of Paso Robles

# Attachment 1

## Summary of Cost and Funding

### ESTIMATED BREAKDOWN OF COSTS

	FY16	FY17
Accela Civic Platform 20 users – 1 year	\$ 39,000	\$ 41,000
Accela/TruePoint Implementation & Training	\$ 323,000	0
<b>Subtotal – Accela / TruePoint</b>	<b>\$362,000</b>	<b>\$ 41,000</b>
Contract Project Management -	\$ 20,000	\$ 0
Backfill Position (estimated) -	\$ 26,000	\$ 14,000
<b>Subtotal – City Implementation Costs</b>	<b>\$ 46,000</b>	<b>\$ 14,000</b>
Hardware & GIS Software costs -	\$ 45,000	\$ 10,000
Project Contingency -	\$ 26,000	\$ 14,000
<b>Subtotal – Hardware/IT/Contingency</b>	<b>\$ 71,000</b>	<b>\$24,000</b>
<b>Estimated Cost per year</b>	<b>\$479,000</b>	<b>\$ 79,000</b>
<b>Total Cost</b>	<b>\$558,000</b>	

### FUNDING SOURCES

Building Permit Automation Fund (122)	\$ 325,000	\$ 18,000
Building Department. Education Fund (114)	\$ 33,000	\$ 0
Budgeted Software (1007151-52205)	\$ 50,000	\$ 50,000
Public Works-Water (6003401)	\$ 25,000	\$ 5,000
Public Works-Sewer (6013501)	\$ 25,000	\$ 5,000
Public Works-Stormwater (6013130)	\$ 21,000	\$ 1,000
<b>Total Funding per year</b>	<b>\$ 479,000</b>	<b>\$ 79,000</b>
<b>Total Funding</b>	<b>\$558,000</b>	

Accela's software is sold as a yearly subscription. **The software will cost \$42,000 in FY 19 with a 5% annual increase each following year.** This cost will be covered by the Community Development Department software maintenance budget.



# Attachment 2

## Draft Resolution A

### RESOLUTION NO. 16-XXX

**RESOLUTION OF THE CITY COUNCIL OF THE CITY OF EL PASO DE ROBLES  
AUTHORIZING THE CITY MANAGER TO EXECUTE CONTRACTS FOR A NEW  
LAND MANAGEMENT SYSTEM (LMS) FOR THE  
COMMUNITY DEVELOPMENT AND PUBLIC WORKS DEPARTMENTS WITH  
ACCELA INC. AND TRUEPOINT SOLUTIONS.**

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WHEREAS, the City currently uses Permits Plus as its building permitting (LMS) software which was purchased in 1998 and has received no maintenance support since 2005; and

WHEREAS, the LMS software is outdated and does not provide for workflow automation, the ability to extract information efficiently, time tracking or the ability to communicate among Departments; and

WHEREAS, in August of 2014, Council adopted a Resolution No. 14-111, directing Staff to implement "cost per hour" billing for plan review inspection services at an hourly rate; and

WHEREAS, the existing LMS software does not allow for tracking of staff time and billing based on real-time hours, therefore staff's ability to implement Council Policy has been limited to date; and

WHEREAS, efficiently implementing "cost per hour" billing, without creating additional work for staff, will require an upgrade of the current LMS software; and

WHEREAS, while still in service; the LMS software is functionally obsolete and is no longer supported by the manufacturer; and

WHEREAS, the Permits Plus database has approximately 100,000 staff hours of data, worth millions of dollars that needs to be transferred to the new system; and

WHEREAS, a needs assessment was prepared by NexLevel Consulting in conjunction with Community Development, Public Works, Emergency Services, Police and I.T. to determine existing deficiencies and desired functions with a new LMS; and

WHEREAS, In November 2015, the City issued a Request for Proposals (RFP) for a new LMS, and six proposals were received. After reviewing the proposals, the field was narrowed to three firms.

- Accela Inc. / TruePoint Solutions
- Sungard Public Sector
- Tyler Technologies; and

WHEREAS, City staff conducted a rigorous Proof of Capabilities process requiring each qualified firm to demonstrate their software features and functionality utilizing information specific to the City; and

WHEREAS, City staff conducted a thorough background reference check, including a site visit to City operating the preferred LMS; and

WHEREAS, after review of the submissions, onsite demonstrations and reference checking, staff is confident Accela Inc.'s Civic Platform software is the optimum LMS product for the City of Paso Robles; and

NOW, THEREFORE, THE CITY COUNCIL OF THE CITY OF EL PASO DE ROBLES DOES HEREBY RESOLVE AS FOLLOWS:

Section 1. The City Manager is authorized and directed to execute professional services agreements to purchase a new LMS software system as follows:

1. City Manager to enter into a contract with Accela for the purchase and implementation of its Civic Platform.
2. City Manager to enter into a contract with TruePoint Solutions for the implementation, conversion and training of Civic Platform.
3. City Manager to enter into a contract with NexLevel Inc. for project management services.
4. City Manager to enter into a contract with VESTRA for the implementation, migration and training of ESRI GIS Server.
5. City Manager to approve "backfill" staffing to assist the implementation of the LMS.
6. City Manager to adjust/amend any and all contracts as further details become evident, for the benefit of the City.
7. City Manager to authorize the Information Technology Manager to purchase the necessary software and hardware for the implementation of the LMS.
8. Total project cost not to exceed \$558,000.

Section 2. Costs and funding of the professional services will be consistent with Exhibit A.

APPROVED this 20<sup>th</sup> day of September, 2016, by the following vote:

AYES:

NOES:

ABSENT:

ABSTAIN:

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Steven W. Martin, Mayor

ATTEST:

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Kristen L. Buxkemper, Deputy City Clerk

Exhibits:

Exhibit A: Costs and Funding Schedule

Exhibit A: Costs and Funding Schedule

ESTIMATED BREAKDOWN OF COSTS

	FY16	FY17
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Total Funding per year	\$ 479,000	\$ 79,000
<u>Total Funding</u>		<u>\$558,000</u>

Accela's software is sold as a yearly subscription. The software will cost \$42,000 in FY 19 with a 5% annual increase each following year. This cost will be covered by the Community Development Department's software maintenance budget.

# City of Paso Robles

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## Land Management System Needs Assessment Report

August 31, 2015



## City Overview

The City of Paso Robles is a community of approximately 30,000 residents nestled in the coastal mountain range of central California. The City was incorporated in 1889, and is a general law City with a Council - Manager form of government.

Located close to mountains, beaches, and deserts, it is home to one of the United States' greatest wine growing areas. Situated midway between Los Angeles and San Francisco, it is also a gateway to thriving metropolitan areas north, south and east. Paso Robles offers all the amenities of family life including attractive and available housing, ample City services, state-of-the-art recreation facilities, easy access to retail shopping, excellent public schools, and safe neighborhoods.

The City understands the importance of business and works hard to attract commerce in a diverse array of industries. Paso Robles' population growth continues to exceed much of the Central Coast. With just over 11% of San Luis Obispo County's population, the City has 19% of retail sales and 53% of manufacturing jobs. Paso Robles has sustained strong, uninterrupted economic growth since 1993. Paso Robles holds the charm of a rural community, but is developing into a center of industry, viticulture, recreation, commerce, and housing. It is truly a place with something for everyone.

The City Manager, appointed by the City Council, is the Chief Executive / Administrative head of government, including being empowered to appoint all City department heads (with the exception of the City Attorney). Residents elect the Mayor and four Councilmembers at large, making each accountable to the entire citizenry. The Council acts as the Board of Directors of the municipal corporation and meets in a public forum where citizens may participate in the governmental process.

The City provides a full range of services to the community including emergency services (fire), police, library and recreation, public transportation, housing services, public utilities (water, wastewater and landfill) and public works. In addition, the city houses the Paso Robles Regional Airport.

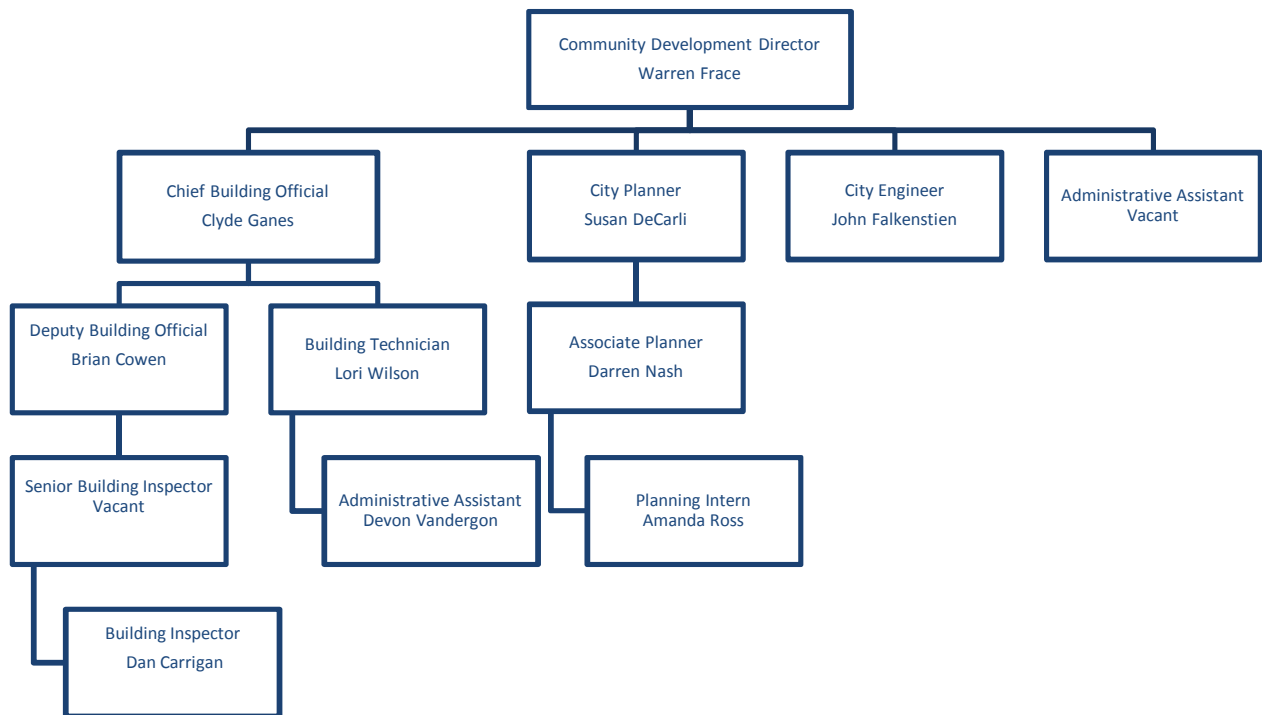
## Community Development Department

The Community Development Department consists of three divisions: Building, Planning, and Engineering. The Building division has been the primary user of the Acella Permits Plus software, utilizing the system primarily to track building related activities and issue permits. The division is responsible for all aspects of a project's activities after project approval,

## City of Paso Robles Land Management System Needs Assessment

including plan check, issuance of permits, ongoing inspections, and the issuance of certificates of occupancy. The Planning division is responsible for reviewing land use applications and assisting applicants with the entitlement process. In addition, the division is responsible for maintaining the City's general plan and related zoning codes. The Engineering division is responsible for ensuring that development on private property is done consistent with City codes and standards.

In addition to these major functions, the Community Development Department also provides low and moderate income households with housing related services, and administers the City's Community Development Block Grant (CDBG) and Redevelopment housing set aside funds. The Department also provides staff support for the City Planning Commission, which is made up of residents appointed by the City Council.



Community Development Department Organization Chart

## Project Purpose and Description

In May 2015 the City contracted with NexLevel Information Technology, Inc. to assist with the identification and selection of a replacement land management system (LMS) to manage its planning, permitting and other land management activities. The City currently issues permits through the Acella Permits Plus software system which was first implemented in 1999. While the system has served the City well, the City is seeking to replace the system with a more current land management system that will be able to provide more functionality including the automation of currently manual functions.

NexLevel and the City discussed the project during a meeting on May 21, 2015, and agreed on the project approach, milestones, and deliverables to be included as part of the overall project. During that meeting, the City outlined the major drivers of the project and discussed system features and functionality desired from the new system. The primary drivers include streamlining business processes, automating functions in certain areas that are currently manual, replacement of outdated software, and improving the level of service to the City's residents and the development community.

The general features and functionality required in the new system include:

### Permit Lifecycle Management

- System management from pre-submittal through multi-department and external approval process, plan checking, conditions, rejections, resubmission, notes, fee calculation and attachments
- Migration of existing building permit system data
- Simple indexed search functionality for any keyword
- Robust Plan Check tracking capabilities - ability to track date received, routed, due date for review for internal and outside reviewers and provide real time status reporting for individual and overall permit process plan check timeframes
  - Ability to track dates including application received, all plan review steps, public noticing, public hearings, CEQA, etc.
  - Automated document tracking processes – e.g. barcoding for all permit documents submitted or generated for a project
- Provide a simple and unified solution to create, track and view all submitted documents, corrections, permits, conditions, fees, inspections, resolutions, and ordinances associated with a permit



## City of Paso Robles Land Management System Needs Assessment

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- Manage and track permit expirations
- Scalable system that allows for additional modules and functions to be added over time

### Customer Access – Web Portal

- Online self-service to view status of planning and permit applications, request inspections, view inspection results, report code violations, and make payments
- The ability for customers to electronically submit applications and plans for permits

### Mobile Access for City Staff

- Ability for the system to support smart phones, iPads or similar mobility related devices, laptops or other devices
- Ability to access real time data in the field, including applications, inspection history, fees, payments, plans and GIS data layers, and other relevant information
- Ability to update information from the field and have the field data immediately update the project history files

### Financial Integration / Project Tracking and Reporting

- Provide real time tracking of project expenses and costs, including staff hours worked (in quarter hour increments), billable hours for outside consultants and other entities (i.e. City Attorney's office), account balances, billing statements, and other related data, all of which must interface directly with the City's financial application (Tyler MUNIS)
- Ability to track hours worked on specific projects, including ability to record hours from mobile locations in the field
- Ability to receive applicant deposits for projects and to bill against those deposits for City staff time worked, along with City Attorney and outside consultant costs
- Ability to issue statements, invoices and reports relating to specific projects
- Ability to easily update permit fees and maintain multiple permit fee schedules

### Reporting and Query Tools

- Full repository of LMS standard reports
- Flexible ad hoc query for non-technical users with the ability to download to Excel
- Ability to create custom reports

## City of Paso Robles Land Management System Needs Assessment

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- Customizable dashboard views to provide management the ability to monitor real time data including plan check status, staff workload, permit status, fees collected, etc.

### GIS Integration

- Ability to view land management information from ESRI GIS
- Ability to link to ESRI GIS from the land management system
- Ability to generate mailing labels based on GIS data

### Electronic Plan Submittal

- System will have available an electronic plan submittal module, which will likely be considered for future implementation

The City seeks a new system that provides the following general system characteristics:

Outlook integration – ability to generate and send emails and calendar events directly from individual permit windows. The ability to generate email from within the application to parties included on the application or to other contacts and to view the associated email correspondence from within the application record (for example, a manager, when in a permit record, can email a staff member about the permit, and the email will contain a direct link to the permit record)

The ability to import Word, Excel, PowerPoint and PDF documents to attach to the application, with the ability to view the attachments from within the application record

The ability to generate and easily customize Word documents, including form letters and project corrections documents, from individual permits

Comprehensive search ability into active and historic records by street name, street number, APN, developer, contractor, plan check number, building permit number, owner name, general project description, tract number, parent parcel number, business name, etc.

The ability to view items identified in a search without having to open and close each item

Contain master files for architects, contractors, owners, tenants, engineers and developers including contact information (including multiple telephone numbers and email addresses) and license numbers

Interface with the State licensing database to determine if contractor licenses are active

The ability to add warnings or flags with notices or restrictions to addresses or APNs

Audit trails to record user activity

## City of Paso Robles Land Management System Needs Assessment

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Provide workflow management tools for each user, with customizable dashboards to manage project deadlines

Role based user profiles

Calculate applicable fees, accept payments (cash, check or credit card), and generate a payment receipt

Provide the ability to issue refunds or adjustments to fees

Utilize the City's accounting codes associated with fees

Interface with the City's business license system to validate license existence

Provide forms and applications that can be completed and submitted electronically

Provide an online knowledge base to assist users with application use

Maintain multiple fee schedules with effective dates

Provide user defined fields for added information flexibility

## Data Gathering and User Interviews

In order to assist the City with the development of a comprehensive request for proposal (RFP) for a new land management system, NexLevel conducted onsite interviews with approximately twenty staff from various divisions and departments of the City including building, planning, code enforcement (Police), and Fire. The interviews were conducted in groups by functional area, and were designed to accommodate all areas of the City that interact with the Community Development Department's processes. The purpose of the interviews was to capture current processes and activities around the land management functions, and to identify potential areas where a future land management system might be able to improve existing functionality.

The remainder of this report is organized by major functional area, and provides a brief background on each area along with a list of "desired functionality" for each of the particular areas. Many of the desired features and functions cross the different functional areas, emphasizing the importance of those particular items for inclusion in the future request for proposal (RFP) to the vendor community.

### Building Division

The Building Division is responsible for permit processing, plan review, calculation / collection of development related impact and cost recovery fees, and inspection services for public and private projects. The division provides public counter services, and also coordinates the plan check review process for residential and commercial projects. The Division issues Building, Electrical, Plumbing and Mechanical Permits and performs field inspections for code compliance during the construction phase of a project. The Division issues a Certificate of Occupancy when the final inspection is completed and all conditions of approval are satisfied. The Building Division uses the Acella Permits Plus software application to support business activity.

#### Building Permit Processing

Typical building permit applications for new construction are submitted in person and require signed applications, deposit fees and four set of plans. The plans are routed to various departments and outside plans examiners for their review and their comments and conditions of approval are routed back and consolidated into one document. The current tracking and organization of plan sets, corrections, and plan check status is a significantly complex and cumbersome process which is highly manual. The City Council has identified as one of its

highest priorities simplifying and expediting the plan check process. Over-the-counter permits are issued for building activity that does not require the approval of plans (i.e. residential water heater or re-roof permit).

While the current system (Acella Permits Plus) provides a certain degree of automation for permit fee calculation and issuance, staff noted that the fee calculation update process is overly cumbersome and requires significant participation from both Building and IT staff. In addition, the current system lacks flexibility with regard to multiple fee schedules.

In addition, the current system does not provide a public portal for applicants to monitor the status of their plan check process, inspection status, or other project related activity. Thus, counter staff spend significant time researching project status and responding to inquiries.

**Desired Functionality:**

Robust Plan Check tracking capabilities - Ability to track date received, routed, due date for review for internal and outside reviewers and provide real time status report for individual and overall permit process plan check timeframes. (This is my number one priority).

Provide a simple and unified solution to create, track and view all submitted documents, corrections, permits, conditions, fees, inspections, resolutions, and ordinances associated with a permit.

Automated document tracking process – e.g. barcoding or all permit documents submitted or generated for a project.

The ability to track a deferred plan check (i.e. for sprinklers, trusses, stairs) with notification after a specified number of days if the deferred plans have not been submitted by the applicant

For over the counter building permit approvals, the ability to automatically generate an approval letter and invoice for payment

The ability to track the date plans were received and routed to all of the reviewers, along with the date the comments are due; and the ability to generate status reports

Ability to accept payments online

Ability to track the location of plans when corrections are required; i.e. the plans were picked up by the architect and the date the plans were picked up

Ability to track status of corrections by a reviewer, which may activate approval or redistribution / re-routing to applicable departments

Ability to automatically generate a report to identify applicants that have not responded to correction notices after a specified number of days

Ability to automatically generate a report to identify applicants with issued building permits that have not requested an inspection after a specified number of days

Ability to generate warning letters to applicants whose permits will expire and update the record that the applicant was notified

Online ability to view permit history for an address

Ability to enter new fee codes prior to the effective date of the rate change

Ability to “link” a set of permits and associate them with one another

Ability to tag and filter permits by type (example: Green permits include solar and other subcategories)

The ability to track a deferred plan check (i.e. for sprinklers, trusses, stairs) with notification after a specified number of days if the deferred plans have not been submitted by the applicant

Robust reporting capabilities that provide data including average number of days for plan check completion, average inspection times, etc, along with establishing “standard” reporting to be generated and distributed on a scheduled basis

## **Building Inspections**

Once the building permit is issued, the contractor is authorized to begin work. The Building Inspectors are responsible for inspection of each trade during the various stages of construction. The contractor requests for inspections are currently limited to a voicemail phone line that is manually transcribed daily. The City has two building inspectors (one Senior Building Inspector and one Building Inspector). The inspector gathers inspection request data and manually routes the days’ inspections. Inspection corrections are generated manually on triplicate paper. At the end of the day, inspection results are entered manually into the Acella Permits Plus system by the inspector.

### **Desired Functionality:**

While working in the field, remote access to the system “real time” using a mobile device is desired to view the permit application, results of previous inspections, and to input the current inspection results

Consideration of additional mobility tools including ability to record inspections (with photos) directly into permit system and print inspection corrections for contractors

Provide the ability to complete an unscheduled inspection while in the field and enter the inspection results into the system using mobile access

When the maximum number of inspection requests has been reached for the day, automatically schedule the inspection for the following business day

Provide a customer portal to request inspections, view inspection results and cancel requested inspections

Ability to send inspection schedule updates to customers via text message and email

Provide the ability to track the expiration of a deferred plan check (i.e. trusses, stairs) and if expired, lock inspection requests for failure to submit deferred plans for approval timely

Ability to attach photos and videos to inspection records

A check off in the system to confirm the inspector has received all paperwork

Centralized approval process; provide the inspector with the ability to identify any outstanding issues that prevent scheduling the final inspection

## Planning Division

The Planning Division is responsible for the administration, interpretation and enforcement of the City's land use activities. This includes coordinating the activities associated with the review of development projects with other divisions within the Department and with outside agencies. The Planning Division reviews all development applications, conditional use permits, rezoning, preliminary subdivision and site plans.

The Planning Division does not utilize an automated software system for managing their activities. Division activities are tracked via various databases utilizing Excel, Access and Word.

### **Desired Functionality:**

The ability to identify a project by entitlement type and manage a unique process for each type of entitlement.

Utilize the same plan check tracking module as the building system.

The ability to easily load and organize PDF documents including correspondence, technical reports, plans (including 10 -100 Mb pdf files), Environmental Impact Reports, project history, notes, site photos, public comments, resolutions, ordinances, and conditions of approval

The ability to easily upload pdf's and plotter scans

The ability to track the dates that plans were received and routed for review, and the date plan review is due from each reviewer

The ability to track the date plans were received and routed to all of the reviewers, along with the date the comments are due; and the ability to generate status reports

Ability to track the location of plans when corrections are required; i.e. the plans were picked up by the architect and the date the plans were picked up

Ability to track status of corrections by a reviewer, which may activate approval or redistribution / re-routing to applicable departments

Ability to automatically generate a report to identify applicants that have not responded to correction notices after a specified number of days

Ability to automatically generate a report to identify applicants with issued building permits that have not requested an inspection after a specified number of days

Robust reporting capabilities that provide data including average number of days for plan check completion, average inspection times, etc, along with establishing “standard” reporting to be generated and distributed on a scheduled basis

The ability to reference a glossary of comments and to cut and paste or expand as needed

The ability to identify the date when plans are returned to the applicant, and an automatic dashboard notification when a specified number of days has passed without input from the applicant

Provide dashboard functionality relating to all planning project activities

The ability to track a variety of user-defined dates for noticing of meetings for Development Review Committee, Planning Commission and City Council

- Ability to track applications that will require the approval of the Planning Commission and/or City Council
- Ability to associate applications with the scheduled Planning Commission and/or City Council meeting schedules and view the items associated with specific meeting dates
- Ability to record the actions taken by the Planning Commission / City Council
- Ability to generate letters to the project representative specifying action taken

Manage California Environmental Quality Act (CEQA) filing date, level of review, studies, notes, documents and deadlines

- Configurable system-generated “form letter” Public Hearing notices utilizing MS Word. Public hearing notices should include case / project number, applicant, locations, CEQA determination, and project description



- Ability to generate a mailing list utilizing the GIS buffering function. Public Hearing notices should include case / project number, applicant, location, California Environmental Quality Act (CEQA) determination, and project description

Allow simultaneous access for multiple users to input plan review conditions and comments

## Engineering (Community Development City Engineer)

The City's Community Development Department houses the City Engineer. Responsibilities of this function include reviewing grading permits, stormwater permits, right-of-way encroachment permits and final subdivision map approvals for consistency with City development standards.

Currently, applications are routed manually to the City Engineer, and comments and requirements are made and routed manually. Interviewees indicated a need for automation of this process, and inclusion in the overall City Engineer review process as a part of the new system.

### **Desired Functionality:**

Include the same plan check process as the building permit process.

The ability to track the date applications were received and routed to all of the reviewers, along with the date the comments are due; and the ability to generate status reports

Ability to accept payments online

Ability to track the location of plans when corrections are required; i.e. the plans were picked up by the architect and the date the plans were picked up

Ability to track status of corrections by a reviewer, which may activate approval or redistribution / re-routing to applicable departments

Ability to automatically generate a report to identify applicants that have not responded to correction notices after a specified number of days

Ability to automatically generate a report to identify applicants with issued building permits that have not requested an inspection after a specified number of days

Ability to generate warning letters to applicants whose permits will expire and update the record that the applicant was notified

Online ability to view permit history for an address

- Ability to enter new fee codes prior to the effective date of the rate change
- Ability to “link” a set of permits and associate them with one another
- Ability to tag and filter permits by type (example: Green permits include solar and other subcategories)
- Robust reporting capabilities that provide data including average number of days for plan check completion, average inspection times, etc, along with establishing “standard” reporting to be generated and distributed on a scheduled basis
- Ability to attach specifications, documentation and other files necessary for the applicant to be aware of the requirements and have a full understanding of the background of said requirements

## Counter Support Staff

Counter support staff performs multiple functions for the Community Development Department, including in person and telephone customer service, project status inquiries, general research regarding projects, properties, zoning and other matters, and calculation and acceptance of payments for all land development activity. Staff use a number of systems to track and research information, including the Acella Permits Plus software, the City’s financial system (Tyler MUNIS), Excel, Access, Word and Outlook. Currently, none of these individual systems interface with one another electronically.

Counter support staff is also responsible for maintaining all records supporting the City’s developer deposits tracking, and for the hourly billing system utilized for many development applications. Specifically, the City has both fixed fees and variable fees for different City services. Some fees are fixed (ie – water heater permit), others vary depending on size and scope of the project (ie – plan check fee), while other projects are billed to the applicant based on actual hours worked by City staff, the City Attorney, and outside consultants. The last category (hourly rate billing) are complex in that they require careful tracking of an applicants’ initial deposit, compilation of hours worked in a given period, invoicing against the initial deposit, and notifying the applicant if their deposit is nearing zero.

Counter staff enter payments into the Acella Permits Plus system throughout the day. Near days end, staff generate reports from the system and reconcile funds collected with the system reports. They then complete a manual form to accompany the funds and turn the packet in to the Finance Department. The Finance Department then enters the data into the City’s financial system.

Staff indicated that they are challenged to be able to monitor expiring permits in a timely manner in order to notify staff and the applicant of potential expiration. They also indicated that there is no ability to monitor and notify regarding finalization of encroachment permits.

**Desired Functionality:**

Provide a complete and functional system to collect, bill to, and track applicant deposits. In addition to functionality for billing for staff, attorney, and consultant time against the applicant deposit, the system needs to include processes for automated notification of deposit amount available, the need to provide additional deposit amounts, and the ability to refund remaining deposit once project is complete

Provide an electronic interface between the new system and the City's Tyler MUNIS financial system to eliminate duplicative data entry

Provide reporting for pending permit expiration, along with automatic generation of notification to applicant via the applicant's preferred notification method

Include all permit types (building, encroachment, grading, etc) as a part of the new system such that the tracking of permit expiration, completion, etc is done through a single database accessible by all staff

## Public Works Department (Future Module)

Interviews with the Public Works Department included the City's Capital Projects Engineer, Water Resources Manager, and Stormwater Manager. The interview participants described their responsibilities surrounding land use, entitlement, and construction activities on private property. The interviewees indicated that some of their activities / responsibilities are not considered during a project's initial review, and that it would be important to be included in the initial processes related to land use applications. Further, the participants described their activities related to development projects after project approval, and indicated that most of these activities are tracked using manual systems and processes.

**Desired Functionality:**

Desire to incorporate a formal project review process for Water division, Wastewater division and all other areas of the Public Works Department that should be a part of the project review process

Ability to easily access and extract property owner / developer contact information

Ability to access approvals, plans, and other project related data

Ability to utilize the new system for Public Works inspection activities, including Water, Wastewater and other PW related inspections

Ability to issue notice of violation related to PW inspection outcomes

Ability to track and monitor public improvement plan check and infrastructure reviews, demand analysis reviews and utilities plans

## Code Enforcement

The Code Enforcement function is housed in the Police Department. Inspectors respond to complaints that may come from the public (online, walk-in, telephone call) and by other City Departments. Complaints are investigated and inspected. Inspectors respond to complaints according to the impact of the violation on the community; situations that appear to pose a serious risk to health and safety are given top priority.

Investigations may result in a courtesy notice or notice of violation requesting the owner/tenant correct the violation in a timely manner. If the correction is not made, the individual may be subject to fines or other penalties.

Currently, case files and history are stored in Outlook and categorized by address. There is no other electronic system in place for code activities. Cases are not tracked formally nor is there formal reporting out regarding outstanding / closed cases. Prioritization of code cases is done by the officer receiving the cases.

### **Desired functionality:**

Ability to track code enforcement cases in a system that is accessible to all City departments via dashboard functionality

Ability to auto generate form letters in MS Word that can be customized as needed with auto references to applicable City Municipal Code sections

Ability to track City department(s) responsibility for code cases, and to be able to transfer and / or split responsibility between City departments

- Integrated email – the ability to email from the case and to view all email activity in the case
- Ability to link photos, video and audio to the case
- Automated re-inspection scheduling
- Ability to route the day’s inspections for each inspector, with the ability to add stops
- Citation issuance should create an accounts receivable automatically, generate monthly statements and assess penalties for late payment
- The ability to issue a receipt from the system
- Ability to track appeal activity
- Mobile access to the system; drop down menus in the forms to allow the inspector to populate the letter in the field and then office staff can print the document
  - o Ability to generate and print correction notices in the field
- Mobile access to GIS with the ability to view activity around a physical point, i.e. determine if a building permit is issued for a nearby location
- Ability to track lien issuance and lien release
- Ability to track multiple violations and types to one case with different due dates
- Ability to consolidate multiple violations into one case letter
- Maintain history of citations by property and person (owner or tenant) including case timeline (opening, closing) and case type

It should be noted that the City does not currently have a Customer Relationship Module (CRM) system in place. As a part of the RFP to the land management system vendors, the City is interested in requesting a CRM system as an optional module, if offered by the vendor. With the number of code enforcement cases currently being managed (20-25 per week); a robust CRM system may meet the City’s needs for code enforcement.

## Fees

The City’s land development related fees are primarily calculated in the Acella Permits Plus system. Some fees are due at application submittal, some at permit issuance and some fees are due prior to occupancy. The City also collects development fees for outside agencies.

The current fee modification / update process is cumbersome, and staff is interested in a less complex method to update fees. In addition, there is a desire to retain multiple fee schedules during transition periods from “current” to “updated” fees.

### **Desired functionality:**

Ability to update fees as needed without significant effort, and ability to maintain more than one fee schedule at a time

System ability to calculate the City's fees (a copy of the City's Master Fee Schedule will be attached as an exhibit to the RFP)

The ability to change fee collection points, change fees, add or eliminate fees, and enter new fee schedules prior to the effective date

## Geographic Information System (GIS)

The City maintains a robust GIS system in the Information Technology division. The system is ESRI based and utilizes Arc GIS online and Arc reader for access to the data. GIS support staff indicated a desire to ensure the ability to use the GIS database in its core format, without having to upload / download and change file structures, is an important consideration for a new LMS application. In addition, staff emphasized the need for an easy and consistent user interface for the future LMS application.

## Other Considerations Related to a New Land Management System

The City has made the decision to acquire and implement a new land management system to replace the current Acella Permits Plus system. The information provided in this report was compiled from information gathered during interviews with staff throughout several departments. While the report contains significant information, it is intended as a starting point in the development of a comprehensive RFP for a new system.

During the interviews, additional questions and comments were raised, which will need to be reviewed and considered prior to release of the RFP. These items are summarized below:

### **Electronic Plan Review**

Many full featured LMS applications offer an electronic plan review function, whereby the applicant provides plans electronically, and all plan review throughout every department is done electronically (versus on paper). While this technology exists and is in use today, it is not necessarily a top priority for all organizations.

The City has determined that this feature should be included in the RFP as functionality that will be considered for future implementation.

### **Business Licensing**

LMS applications often provide a module for business license processing. The City may wish to consider migrating from its current business license software and incorporate business license processing into the new LMS.

The City has determined that it wishes to consider business licensing functionality as a future optional module.

### **Bar Code Technology**

A concept that was discussed during the interview process was the potential use of a bar code scanning system to track applicant plans. The concept as described was that at plans intake, the system could generate a bar code label that associates the project applicant data with the sets of plans, then label each set of plans with the bar code, thus providing easy ability to find sets of plans through scanning of the bar code label.

The City has determined that it wishes to reference this as a desired function in the RFP.

### **“Source of Truth”**

Much discussion took place throughout the interviews regarding what data set should be used as the “source of truth” for all data relating to an application, permit, or other City activity. Software systems have the ability to associate activities to a single point – for example, a property address or an assessor’s parcel number (APN); however, the reliability of these and other “single point” is only as good as the data entered into the system or on how current the data is. For example, the addressing scheme could show an address as 123 Main Street; 123 N Main; 123 Main St. Similarly, a single APN could represent multiple parcels that have been merged, or one APN could have been split without the records being updated. These concerns led to discussion about the best “source of truth” to utilize when designing the processes around a new LMS. In the end, one alternative that was discussed was the use of a GIS polygon as the source of truth.

The City has determined that GIS polygons will be utilized as the source of truth, but that it is likely a new GIS layer will need to be developed to accommodate this. The RFP will acknowledge that the vendor and the City’s GIS division will need to address this.

### **Data Conversion**

Staff clearly described their desires relating to data conversion. Specifically, they indicated that they needed all historical data from the Acella Permits Plus and other legacy systems migrated into the new system. Further, the City indicated that they want the new system provider to conduct all data conversion services and activities independent of City participation (other than providing access to the SQL server).

Data conversion can be a costly and time consuming endeavor. Typically, the more data that is converted from multiple systems, the higher the conversion cost. The City should carefully consider the potential ramifications of requesting a migration of all historical data before requesting this item as a part of the RFP. The City has determined that it wishes to request of vendors a menu of data conversion cost options.



## City of Paso Robles - Accela Features / Functionality Standouts

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To: Warren Frace – Community Development Director

From: Patrick Griffin, NexLevel Information Technology, Inc.

Subject: Outcome of LMS System Vendor Evaluations

Date: March 16, 2016

From March 9 – 11, 2016, NexLevel facilitated Proof of Capabilities (POC) sessions with three Land Management System software providers. At the conclusion of the three days of POCs, NexLevel and the City evaluation team met to review the outcome of the activities and begin the process of identifying the top choice among the three solution providers.

Prior to beginning discussions, each of the evaluation team members was asked to anonymously write their choices, in order of preference, for the new LMS system. The outcome of that polling was a unanimous placement of Accela as the number one choice of the team. Subsequently, the team discussed the reasons for their decision. Those reasons are outlined below.

### **Software / Technology Platform**

Most current and most modern User Interface (HTML5) - very configurable with responsive screen technology

Best “user experience”

- screen layout, navigation
- logical / intuitive design
- flexibility
- robust searchability
- strong applicant tracking
- customizable tables
- drag and drop screen redesigns
- audit logs of all changes
- 3 click depth design
- Robust visual dashboard showing permitting queues and statistics
- Strong search tools
- Can create custom features
- Robust document control options

Workflow setup includes a visual representation to assist with design / troubleshooting

- Assign, claim, release tasks (workflow to-do list)

Document management – easy to use attachment function included

Process driven calendar whereby adding items to a particular event (ie – PC meeting) other associated dates driven by that event would be generated along with reminders

Built-in Planning Commission agenda management tools

Built in barcoding of paper plans, and a system for keeping track of plans location

# City of Paso Robles - Accela Features / Functionality Standouts

---

## **Mobility**

Utilizes any iOS or Android device

Features and functions fully accessible by remote users

All data in city hall system accessible in field

Field input updates project data in city hall system

Field personnel can manage permit activity from field

Photos in field can be attached to permit or other record

Ability to send text notices to customers / field employees for inspection scheduling activities

## **Code Enforcement**

Code enforcement included with purchase of user licenses

Ability to initiate and populate a code enforcement case “on the fly” in the field from GIS database by pinning GIS coordinates

## **GIS**

Java map viewer – fast aerial display

Can tie permit to any GIS feature

Can include street view

## **Customer Portal**

Embedded into City webpage

Fully searchable

Non-project specific customer information posted here and available for download to public

Login and password protection for project specific information

Provides permit status, reporting, deposit activity once logged in

Best customer account page for self-management – included ability to add funds to deposit online and get notifications when funds are low

Customer deposits provides running balance on permit screen, easy payment and receipting process, track time by workflow item

## **Reporting**

Ad hoc report writer that provides the report displayed on the screen once generated

Includes drag and drop abilities to add columns, rows, change order, format of report

Management dashboard with full featured customization

On screen viewing of many items - not necessary to create report

City data can be shared via included CivicData.com warehouse (web interface)

- Data can be customized by end user to include custom graphics
- Provides City information transparency

# City of Paso Robles - Accela Features / Functionality Standouts

---

## **Electronic Plan Review**

Utilizes either Adobe or Bluebeam (City's choice)  
Provides link to ICC codes and Municipal Code  
Ability for concurrent review / editing of plans  
Links plans by type  
On line video demos of functionality  
Integrated plans management

## **Data Conversion**

Simplest data conversion process from existing Accela (Permits Plus) to new system  
3<sup>rd</sup> party implementer (TruPoint) is conversion specialist  
Demonstrated firsthand knowledge of Permits plus database structure and has specific experience in converting data very much like ours

## **CRM (Customer Relationship Module) / 311 – Included with package**

Customers can submit a photo with GIS coordinates to report a problem  
Information generates service request  
This can auto ID and link to related cases or duplicate cases  
Auto updates workflow and attachments

# Building Permit / Land Management System (LMS)

*City of Paso Robles, CA*

January 8, 2016

**ELECTRONIC COPY**





## Connecting Citizens and Government

## Cover Letter

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*The vendor proposal must provide a written transmittal of the proposal in the form of a cover letter. The letter must be signed by a company officer empowered to bind the Proposer to the provisions of this RFP and any contract awarded pursuant to it. The cover letter will reference and respond to each of the following bulleted items:*

- *Proposer's legal name and corporate structure.*
- *A high-level statement of the Proposer's credentials to deliver the services sought under the RFP.*
- *Primary proposal contact name, mailing address, e-mail address, and telephone number.*
- *Identification of use of subcontractor(s), if any, and scope of work to be performed by subcontractor(s).*
- *Identification of any pending litigation against Proposer.*
- *Disclosure of any bankruptcy or insolvency proceedings in the last ten (10) years.*
- *A statement indicating the proposal remains valid for at least 120 days.*
- *A statement that the Proposer or any individual who will perform work for the Proposer is free of any conflict of interest (e.g., employment by the City).*
- *Statement of acknowledgement that the City's legal documents have been reviewed and accepted with or without qualification. If qualifications are involved, those items requiring adjustment or modification must be identified and listed along with suggested modifications to the contract. If no modifications are noted, the City will assume that the Proposer is capable of performing all normal tasks and services without reservation or qualification to the contract. [Requirement rescinded via email from P. Griffin Dec 31, 2015.]*
- *Signature of a company officer empowered to bind the Proposer to the provisions of this RFP and any contract awarded pursuant to it.*

*The Proposal cover letter is mandatory; thus failure to provide the information as required may result in the proposal being considered non-responsive and rejected.*

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January 5, 2016

City of Paso Robles - Building Division Counter  
1000 Spring St, 2<sup>nd</sup> Floor  
Paso Robles, CA 93446

Re: Building Permit / LMS RFP

Dear Members of the City Evaluation Panel:

Accela Inc., a privately held corporation, is pleased to submit our response to the City of Paso Robles Building Permit/LMS RFP. This proposal is submitted for the upgrading of the existing Accela Permits Plus Software and licensing module.

The requirements outlined in the RFP parallel the product and services that Accela has provided to more than 2,100 local and state government customers over the past 33 years. We have seen our products evolve from DOS-based environments to their present and complete web-based architecture. Accela leads the marketplace by continuing to improve and enhance our applications so that customers like the City of Paso Robles can provide greater efficiencies and customer service through our automated technology.

Accela is proposing to partner with TruePoint Solutions, a certified Accela partner - and premier provider of implementations, consulting and professional services. TruePoint's depth of experience and network of professionals will work closely with the City and Accela to ensure a timely and well managed implementation.

There is currently no pending or threatened litigation against Accela in connection with the services it provides to customers.

Accela confirms that the company, its principals, directors, companies that it has held a controlling interest in, or which have held a controlling interest in the company, never filed for or have been involuntarily put into bankruptcy or have been declared bankrupt.

Accela confirms that the company and/or any individual who will perform work for Accela is free of any conflict of interest.



Accela hereby acknowledges that the proposal remains valid for a period of 120 days from the RFP closing date.

I am authorized to bind the company contractually and will act as Accela's primary contact for all matters regarding this response and any subsequent phases. I can be reached at our corporate office at 925.659.3247 or via email at [jmunoz@accela.com](mailto:jmunoz@accela.com).

Thank you for your consideration.



**Julian D. Muñoz**  
Vice President

Enclosures

## Connecting Citizens and Government

### About Accela

Accela provides cloud-based civic engagement solutions for government. Accela's Civic Platform, which includes open APIs and mobile apps, enables and improves core processes for city, county, state and federal governments. Accela's solutions uniquely address the diverse needs of their constituents by making publicly available information more accessible. The Accela Civic Platform includes solutions for land management, asset management, permitting and case management, legislative management and more. With more than 2,000 customers worldwide, Accela is headquartered in San Ramon, California, with offices in San Francisco, New York, Portland, Melbourne and Dubai. For more information, visit [www.accela.com](http://www.accela.com).

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**About Accela**

Accela provides cloud-based civic engagement solutions for government. Accela's Civic Platform, which includes open APIs and mobile apps, enables and improves core processes for city, county, state and federal governments. Accela's solutions uniquely address the diverse needs of their constituents by making publicly available information more accessible. The Accela Civic Platform includes solutions for land management, asset management, licensing and case management, legislative management and more. With more than 2,000 customers worldwide, Accela is headquartered in San Ramon, California, with offices in San Francisco, New York, Portland, Melbourne and Dubai. For more information, visit [www.accela.com](http://www.accela.com).

**Disclosure**

In relation to future versions of planned system enhancements or future product direction, the information contained in this material is not a commitment or legal obligation to deliver any of the features or functionality described herein.

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## Executive Summary

What does the Civic Platform make possible?

Transforms civic participation through mobile and cloud-based technology

Empowers collective action for better and healthier communities

Brings trust and flexibility to citizen interaction with government

Streamlines processes and handles data management with ease

Revolutionizes the way contractors engage with the government

Creates open space for innovation

Watch Maury Blackman, Accela CEO, explain how the Civic Platform benefits government at <http://bloom.bg/1EjnJRC>

*This section of the Proposer's proposal should provide a brief and concise synopsis of Proposer's proposal and a description of the Proposer's credentials to deliver the services sought under the RFP. The Executive Summary is limited to three (3) pages.*

As the City of Paso Robles' incumbent software provider, we are aware of the City's need for new and proven technology to keep up with its strong growth and to automate and provide seamless integration between processes and activities of both the Community Development and Public Works departments. Accela has long recognized the City's need to replace Permits Plus, the current Community Development Department's Inspection, Permitting, and Land Management Information System.

Based on the City's specific solicitation requirements, we believe that continuing our relationship with the City under the Accela Civic Platform provides the best and most appropriate choice to satisfy the requirements as well as address the community's growing population and business needs. Like many other legacy upgrades of our systems, the Civic Platform will significantly reduce and in many cases, eliminate, the currently complex and cumbersome processes that exist. Many local communities and their constituents have praised our solution for simplifying the work effort and inter-communication, thus engaging civic engagement to its most beneficial degree.

The highly configurable solution we are proposing will significantly improve upon the nature of making changes or adding new elements including those that relate to permit fee calculations, schedules and updates. This same approach will facilitate and automate all aspects of plan check tracking eliminating one of the most significant and vital areas of permit processing. The City will be able to quickly and easily enact changes and make additions to all components of the solution as business rules change or emerge.

Accela is pleased to propose the Accela Civic Platform as the solution to facilitate improved processes regarding:

- Planning, Zoning, Permitting, Inspections, Business License and Enforcement processes for improved customer service, citizen engagement and business efficiency.
- GIS integration, such as beginning development projects from a map
- Mobile field inspections & investigations across any Windows, iOS, and Android device in both an online & offline state
- Citizen web access for online constituent services
- Robust reporting that is simple to use (Video: <http://bitly.com/AdHocReports>)



Upgrading to our Civic Platform will certainly offer the features and flexibility that the City seeks in an inventive and highly configurable, web-based solution. With 34 years of experience in the public sector, we can ensure that the City will be successful in a smooth transition from the Permits Plus client-server environment to the more user friendly and web-based platform with no loss in integrity of legacy Permits Plus data.

Also to the City's advantage, we offer a state-of-the art facility located in San Jose, CA for hosted customers. Through our Civic Platform, new public sector customers (self-hosted and Accela-hosted) have realized the value of improved service and functionality for their users and their customers in communities across the U.S. and around the world.

We believe in empowering government to govern better, which allows citizens to experience the civic engagement they have come to expect.

## The Accela Solution

Our proposed Accela Land management solution described below highlights our strengths and position as a market leader in providing exceptional workflow solutions to state and local government agencies:

Accela was selected as the recipient of the [2013 Esri Partner Conference Award for Private \(Internal\) Web Application for Accela Civic Platform](#), a GIS-infused platform for government. The award is given to the company that demonstrates practical yet innovative solutions with ArcGIS 10.1. Partners were nominated by various Esri staff and distributors.

- ➔ **Accela Land management** is the backbone for all land use and community development activities ranging from addressing, zoning, to plan review, permitting, inspections, to code enforcement, and more. Specific features are essential for automating the hundreds of steps involved with permitting and serves as a valuable tool in controlling project resources, timelines, and financing by tracking all plan guidelines and enabling that milestones are met - grant variances, conditional uses, environmental issues, departmental reviews, appeals, and much more.
- ➔ **Citizen Access**, the public facing web portal, substantially reduces the need for counter operations and provides 24 hour online and telephone access to government operations.
- ➔ **GIS**, delivers mapping and routing functionality to the enterprise. This overlays government data onto Bing and GIS maps, and allows customers to initiate and manage a variety of activities from a geospatial platform.
- ➔ **Mobile Extensions** enhances system accessibility options for staff by extending back office options to the field with store and forward capabilities when an Internet connection is not available.

The enterprise platform described above creates a true enterprise approach for the City's processes and transactions.

## Project Services Partner: TruePoint Solutions



Over the course of its existence, Accela has developed an extensive network of partners. Accela's partner system is one of its strengths, as it allows for a reduction in overall project times as well as costs. Accela trains and fully supports all of its partners, meaning there is no risk to performance, functionality, or support for agencies who contract with partners. For the purposes of the services portion of the project for the City of Paso Robles, Accela is partnering with TruePoint Solutions.

Established in late 2004, TruePoint Solutions, LLC is a privately held software and solutions company based out of Loomis, CA. TruePoint is an Accela certified Platinum level implementation services partner and has been engaged on nearly 100 Accela projects since 2005.

TruePoint is comprised of some of the most talented individuals in the country in the arena of implementing complex government software solutions, making them the ideal group for Accela to collaborate with for the City's project. TruePoint possess a phenomenal amount of directly related experience in designing, developing, implementing, training, and supporting IT systems for local government the industry, through the shared experience of its highly skilled and experienced staff who have worked together substantially for more than a decade, with the owners having worked together for almost 30 years. The result of these long-term working relationships is that the entire team shares the same perspective on customer service, delivery, and ultimate client satisfaction.

## **Conclusion**

In any evaluation process, it is just as important to consider the strength and history of a company as to consider the solution itself. We are confident that the Accela Civic Platform provides the best ingredients of success: Experience and domain expertise, breadth and scope of solutions, use of the latest technologies, the mitigation of project risk, ability to deliver as promised, and the sheer size of our customer base. In the end, these reasons will contribute to the successful project outcome that City stakeholders envision.

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## Section 1.0 Company Background

*This section of the Proposer's proposal should identify the following:  
1.1 - A brief description of the Proposer's background and organizational history.*

Accela, a privately held company, was incorporated in California in 1981.

### WHO WE ARE



**Exhibit 1: Who We Are**

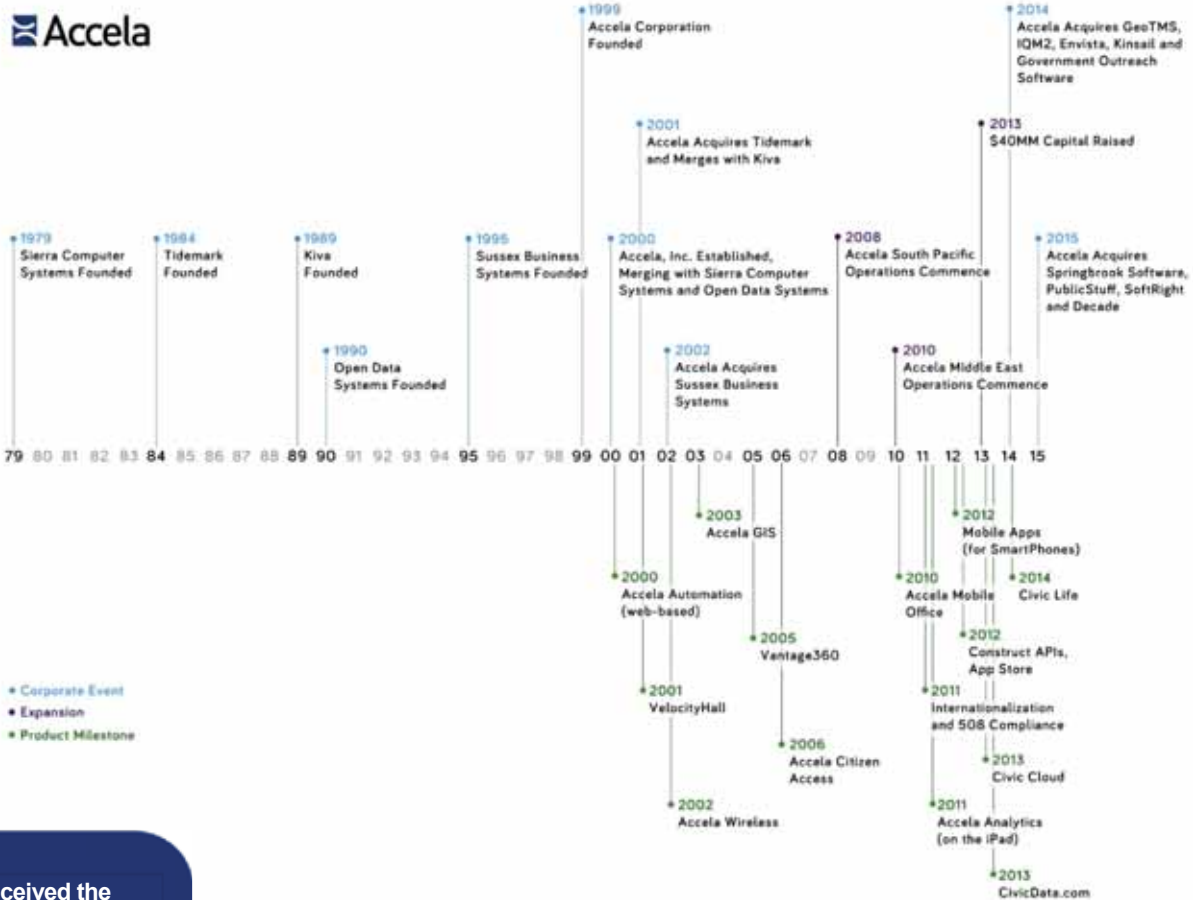
Our Civic Platform is implemented in virtually all U.S. states, as well as in Canada, Puerto Rico, Australia, New Zealand, and the United Arab Emirates. Throughout its 34-year history, Accela has served over 2,000 separate agencies and thousands of their departments with our Civic Platform, including agencies that range in size from Nogales, AZ to the States of:



- ➔ California
- ➔ District of Columbia
- ➔ Maryland
- ➔ Massachusetts
- ➔ Michigan
- ➔ Mississippi
- ➔ Montana
- ➔ New Mexico
- ➔ New York
- ➔ North Carolina
- ➔ Oregon
- ➔ Virginia
- ➔ Washington

The following corporate timeline identifies key events in Accela's company history, including mergers and acquisitions. Much like Accela, the companies we have acquired have significant experience building solutions that streamline interactions between government agencies and citizens. These acquisitions will help us deliver a comprehensive Platform offering; we also believe we can significantly accelerate the growth and innovation of our acquired solutions with them as a part of the Accela team. Simply put, we gain a new recurring revenue

stream and their loyal base of customers, and they benefit from the strength and breadth of Accela and the Civic Platform.



**Exhibit 2: Accela's Corporate Timeline**

*1.2 - A statement of how long the Proposer has been performing the services required by this RFP.*

Throughout its 34-year history, Accela has been engaged in providing Permitting and Land Management software to government entities and has served over 2,000 separate agencies and thousands of their departments with our Civic Platform. In 1999, Accela launched Accela Automation—a Web-enabled enterprise platform. For the last 15 years, our focus has been delivering advanced web-based solutions to back-office and field-based government workers, featuring:

Accela received the 2013 Esri Partner Conference Award for Private (Internal) Web Application for Accela's Civic Platform, a GIS-infused platform for government. The award is given to the company that demonstrates practical yet innovative solutions with ArcGIS 10.1. Please visit our [website](#) for more details.



- ➔ Strong mapping integration (Esri GIS), mobility apps, online citizen services, and integrated voice response (IVR)
- ➔ On Premise or Cloud deployments
- ➔ Perpetual License or Subscription-based pricing models
- ➔ Multi-Tenant and regional solutions
- ➔ Multi-lingual and internationalized solutions
- ➔ Established strategic partnerships with industry leaders including, but not limited to Adobe, Apple, Avolve, Cisco, Esri, Hewlett Packard, Intel, Microsoft, Oracle, Selectron and Woolpert



Community Development



Open for Business



Hackathons and App Challenges



Development Tools and Support



Mobile Apps



Online Access 24/7/365



Open Data and Standards



Information Services

*1.3 - Identify the location of headquarters, technical support, and field offices.*

*1.4 - Identify the location of office that would service the City.*

Accela is headquartered in San Ramon, California as are its technical support operations. To meet growing global demand Accela maintains business offices in the United States, the United Arab Emirates, and Australia.

The City of Paso Robles would be serviced directly from Accela's headquarters.

*1.5 - A description of the organization's number of employees and longevity.*

The company employs 600+ technology professionals. Over a quarter of the staff have been with the company for greater than 3/5/10 or 15 years and three of the original founders remain committed to the company.

*1.6 - Identify whether there have been any mergers, acquisitions, or sales of the Proposer company within the last five (5) years (if so, an explanation providing relevant details).*

*1.7 - Identify if the organization is a subsidiary to a larger parent company. If so, whom?*

In the past five years, Accela has acquired the following companies:

**2014:** GeoTMS, IQM2, Envista, Kinsail and Government Outreach Software

**2015:** Springbrook Software, PublicStuff; SoftRight and Decade

Accela is not a subsidiary to a larger parent company.

*1.8 - Documentation that shows that the Proposer's annual company revenues and profit for the last three (3) company fiscal years. It is acceptable to include this information as an appendix in the proposal. The Background section should not exceed three (3) pages.*

Please see the [Appendix](#) for information on Accela's financial information.

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## Section 2.0 Company Qualifications

*In this section, the Proposer should identify company qualifications and experience in implementing solutions similar to what the City is seeking.*

### 2.1 Experience in Permitting & Land Use Systems

*2.1 - Describe your firm's familiarity with public sector permitting systems and business processes, and experience with the requirements of the State of California.*

#### 2.1.1 Public Sector Permitting Systems

Accela has over three decades' experience delivering market-leading land management solutions. In fact, according to a recent report by Accela and the Center for Digital Government, Accela serves as the land management system vendor of choice for 25 of the top 50 U.S. cities by population. Since the publication in February 2014, we have won San Antonio Texas and the City of San Diego. Moreover, we provide solutions for over 50% of California cities and counties. Our solutions worldwide power tens of thousands of services and millions of transactions for thousands of public agencies, allowing these agencies to connect with over 75 million citizens. We have unparalleled experience implementing Permitting and Land Management Systems comparable in size, scope, and complexity to the City's requirements. Accela's land management solution provides a backbone for all land use and community development activities ranging from addressing, zoning, to plan review, permitting, inspections, to code enforcement, and more. Specific features are essential for automating the hundreds of steps involved with permitting and serves as a valuable tool in controlling project resources, timelines, and financing by tracking all plan guidelines and enabling that milestones are met - grant variances, conditional uses, environmental issues, departmental reviews, appeals, and much more. Our land management solution creates a true enterprise approach for agencies' processes and transactions.

Over its 34-year history, Accela has implemented Accela Civic Platform solutions for over 50% of the top 50 Cities in the United States, the majority of them being permitting and land management systems. Since February 2014, we have won San Antonio Texas and the City of San Diego. Moreover, we provide solutions for over 50% of California cities and counties. Our solutions worldwide power tens of thousands of services and millions of transactions for thousands of public agencies, allowing these agencies to connect with over 75 million citizens. We have unparalleled experience implementing Permitting and Land Management Systems comparable in size, scope, and complexity to the City's requirements.

To read Land Management customer success stories, visit <http://bit.ly/1OxdZgg>



## 2.1.2 Experience with California Requirements

Accela utilizes a robust and multi-pronged strategy to follow and engage on policy initiatives and regulatory actions that affect the ongoing product requirements of our customers. Accela’s active involvement in policies that affect our customers help Accela deliver technologies that meet, or often exceed, newly emerging regulatory requirements.

- ➔ **Accela Customer User Groups:** Accela maintains an active network of customer user groups at the national, regional, and local level. These groups participate in both in person and online forums and provide ongoing feedback to Accela on emerging product requirements, such as those that are based on emerging regulations.
- ➔ **Government and Trade Associations:** Accela is an active member and participant in government and trade associations at the international, national, state, county, and local level. A sample of the groups Accela actively participates in includes the International Code Council, the American Planning Association, National League of Cities, U.S. Conference of Mayors, International City & County Managers Association, National Association of Counties, National Association of State Chief Information Officers, E-republic Digital Communities Program, League of California Cities, and the Silicon Valley Leadership Group. These organizations are actively involved in discussing emerging policies and regulations that affect the technology needs of Accela’s customers. Accela’s participation ensures that the technology requirements and capacity of our customers is represented in these forums and that Accela’s management and product teams are informed of emerging regulatory changes that would affect our customers’ requirements from our technologies.
- ➔ **Accela Government Relations Team:** Accela maintains a team of government relations professionals that actively follows policy and regulatory issues that affect the requirements of our customers and reports back to Accela’s senior management and product teams concerning regulatory changes that affect our customers and the demands placed on our technology.
- ➔ **Accela Center of Excellence:** Accela maintains an agile team of product experts and software engineers called the Center of Excellence that continuously works on the emerging requirements placed on our products. This team regularly synthesizes the technology requirements of new regulations and provides our customers with flexible and cost effective enhancements to our products that insure our customers meet or exceed regulatory requirements.

To read about some of our California success stories:

[San Diego County](#)

[City of Palo Alto](#)

[Sacramento](#)

A recent example of how the above strategy results in Accela being responsive to our customers technology needs involved the [California Solar Permitting legislation - AB 2188](#). As the solar permitting policy issue has evolved

nationally, and in California through AB 2188 legislation, Accela noted it as an emerging issue that would affect the demands placed on Accela’s Land Management customers. Accela noted an increase in discussion of solar permitting in our customer user groups and government and trade associations.

Accela’s Government Relations team began actively tracking the issue and worked with Accela’s product teams and the Accela Center of Excellence to produce a strategy that would provide current and prospective Accela customers with a best-in-class solution to this emerging regulatory requirement. Accela’s team started by creating a “best practice template” that provides a cost-efficient strategy for our customers to comply with the requirements of AB 2188.

Going beyond simply offering solutions that comply with regulatory requirements, Accela has now been selected by the U.S. Department of Energy as a member of the Northern and Central California Sunshot Alliance. Along with PG&E, SolarCity, Qado Energy, and California governments like the City of Livermore, CA, Accela will collaborate to implement an end-to-end regulatory process and technology system for rooftop solar that will serve as a national “best practice” model and cut the average install time of a rooftop solar system from 30 days to just one day.

## 2.2 Community Development Department experience

*2.2 - Describe your experience in implementing your system in Community Development Departments within California municipalities.*

Accela serves 366 customers in the State of California, 35 of which implemented our proposed Accela Hosted Land Management solution.

## 2.3 Client Base

*2.3 - Discuss your existing client base including identifying the number of existing clients using the version/release of the software you are proposing. Clearly identify the number of California public agency installations.*

*The Company Qualifications section should not exceed five (5) pages.*

Of all Accela customers with Civic Platform, 237 are on the most recent version and 354 are located in California. In August 2015, Accela announced a new UI enhancement release which was deployed in late October. Based on the timing of this RFP, Accela is proposing Version 8, our most recent version of software with the UI enhancement. Accela considers our customer list to be confidential information. We appreciate the City’s effort to keep our competitors from accessing the client list below:

**Exhibit 3: A selection of Accela Land Management Clients in the State of California**

<b>Agency Name</b>	<b>Agency Population</b>
Alameda, CA	75,641
Benicia, CA	27,426
Berkeley, CA	115,403
Ceres, CA	45,719
Contra Costa County, CA	1,079,597
Culver City, CA	39,313
Downey, CA	113,242
Eastvale, CA	57,251
Grass Valley, CA	12,840
Hermosa Beach, CA	19,506
Livermore, CA	85,160
Los Gatos, CA	30,141
Manhattan Beach, CA	35,135
Martinez, CA	36,673
Menifee, CA	81,474
Monterey County, CA	426,762
Monterey Park, CA	60,269
Moreno Valley, CA	186,365
Napa County, CA	139,045
Newport Beach, CA	87,266
Oakland, CA	406,253
Ontario, CA	167,211
Palo Alto, CA	66,363
Paradise, CA	26,216
Perris, CA	69,967
Placer County, CA	361,682
Pleasant Hill, CA	33,831
Port of San Francisco	837,442
Rancho Cucamonga, CA	170,746
Roseville, CA	124,519
Sacramento, CA	475,516

Sacramento County, CA	1,450,121
San Diego, CA	1,345,895
San Diego County, CA	3,177,063
San Dimas, CA	33,371
San Francisco City and County, CA	744,041
San Leandro, CA	86,071
San Mateo County, CA	739,311
Santa Barbara County, CA	431,249
Santa Clarita, CA	177,000
Santa Monica, CA	91,812
Santa Rosa, CA	157,468
Solano County, CA	420,757
Stanislaus County, CA	525,491
State of California - Coastal Commission	1
State of California - Lands Commission	38,041,430
State of California - Natural Resources Agency	38,400,000
State of California - OSHPD - Statewide Health Planning and Development	0
Stockton, CA	296,357
Ventura County, CA	835,981
Ventura County, CA - Fire District, CA	1
Walnut Creek, CA	64,173
West Sacramento, CA	49,523

We would also refer the reader to the research report From Planning to Permits, Zoning to Compliance in section 8.0 of this proposal for research results on the 50 largest U.S. cities' use of automated land management systems for a high-level view of Accela's client base.

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## Section 3.0 References

*The Proposer must provide a minimum of five (5) references, with at least three (3) of the references for systems that have been implemented in the last three (3) years. The City strongly prefers references from California agencies that provide services of similar size and complexity to the City. The Proposer's reference information must include the following information and be presented in a substantially similar format as the table below.*

Our solution has built a global presence helping over 2000 customers worldwide ranging from population size of 9,000 to 1.23 million to better manage more than 250,000 projects. We encourage the C evaluation committee to contact the following Accela references for more details in assistance to your assessment of our overall qualifications and past project performance.

Reference 1	
Customer Name	Alameda, CA
Customer Contact Name, Title, Address, Phone, and E-mail	Erin Garcia, Accounting Technician 2263 Santa Clara Ave, Rm 190 Alameda, CA 94501 Phone: (510) 747-6816 Email: <a href="mailto:egarcia@alamedaca.gov">egarcia@alamedaca.gov</a>
Brief Project Description	Accela Land Management Implementation
# of Users	31
Current Status of Project	Completed- customer is live
Current Software Release Version	7.3.3.3.4
Database Environment	Oracle 10G
Modules Implemented	Accela Land Management, Accela Citizen Access; Accela GIS; CivicData.com
Go-Live Date	2/26/2008
Implementation Period (months)	12 months
System Cost (including software, hardware, data conversion and implementation)	\$347,000

Reference 2	
Customer Name	Perris, CA
Customer Contact Name, Title, Address, Phone, and E-mail	Clara Miramontes Director of Development Services 135 North D" Street Perris, California 92886 Phone: (951) 943-5003 ext. 272 Email: <a href="mailto:cmiramontes@cityofperris.org">cmiramontes@cityofperris.org</a>
Brief Project Description	Accela Best Practice Implementation and upgrade from legacy Accela system Permits Plus
# of Users	20
Current Status of Project	Completed- customer is live
Current Software Release Version	7.3.3.3.4
Database Environment	unknown
Modules Implemented	Accela Land Management, Accela Citizen Access, Accela GIS, Accela Mobile Office
Go-Live Date	3/11/2015
Implementation Period (months)	7 months
System Cost (including software, hardware, data conversion and implementation)	\$198,900

Reference 3	
Customer Name	Palo Alto, CA
Customer Contact Name, Title, Address, Phone, and E-mail	Peter Pirnejad Director of Development Services 250 Hamilton Ave, Palo Alto, CA 94301 Phone: (650) 329-2349 Email: <a href="mailto:peter.pirnejad@cityofpaloalto.org">peter.pirnejad@cityofpaloalto.org</a>
Brief Project Description	Upgrade from legacy Accela product, Permits Plus
# of Users	20
Current Status of Project	Completed- customer is live
Current Software Release Version	7.3.3.3.4
Database Environment	Oracle 10G

Modules Implemented	Accela Land Management, Accela Citizen Access; Accela GIS; Accela IVR; CivicData.com, Legislative Management; Public Stuff - CRM
Go-Live Date	6/1/2004
Implementation Period (months)	12 months
System Cost (including software, hardware, data conversion and implementation)	\$300,000

#### Reference 4

Customer Name	Livermore, CA
Customer Contact Name, Title, Address, Phone, and E-mail	Lorraine Purcell, GIS Specialist and Civil Engineer 1052 S. Livermore Ave Livermore, CA 94550 Phone: (925) 960-4555 Email: <a href="mailto:lwpurcell@cityoflivermore.net">lwpurcell@cityoflivermore.net</a>
Brief Project Description	Upgrade from legacy Accela product, Permits Plus
# of Users	15
Current Status of Project	Completed- customer is live
Current Software Release Version	7.3.3.3.4
Database Environment	Oracle 9i
Modules Implemented	Accela Land Management, Accela Citizen Access; Accela GIS; Accela Mobile Office
Go-Live Date	7/28/14
Implementation Period (months)	12 months
System Cost (including software, hardware, data conversion and implementation)	\$984,800



Reference 5	
Customer Name	Stanislaus County
Customer Contact Name, Title, Address, Phone, and E-mail	Denny Ferreira Supervising Building Inspector 1010 10th Street, Suite 3400 Modesto, California 95354 Phone: 209-652-0471 Email: <a href="mailto:ferreirad@stancounty.com">ferreirad@stancounty.com</a>
Brief Project Description	Upgrade from legacy Accela product, Tidemark.
# of Users	20
Current Status of Project	Completed- customer is live
Current Software Release Version	Agency Hosted
Database Environment	Agency Hosted
Modules Implemented	Accela Land Management, Accela Citizen Access; Accela GIS, Government Outreach - CRM
Go-Live Date	12/15/2012
Implementation Period (months)	12 months
System Cost (including software, hardware, data conversion and implementation)	\$385,000

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## Section 4.0 Proposed Solution

### 4.1 Solution Overview

*4.1 - Proposed solution overview identifying origin of system, release history, current release being proposed, and number of operational installations for the proposed software solution.*

To read specific Land Management customer success stories, visit <http://bit.ly/1OxdZqg>.

To hear why our customers love Accela, visit <http://bit.ly/1N5bLN5>.

4 out of 5 of the top five best run cities use Accela software.

Source:  
<http://bit.ly/1DfkVF6>

Throughout the State of California, cities and counties are using Accela's solutions to manage processes from pre-planning to Certificate of Occupancy and beyond. This footprint in the local government software market assures the City of Paso Robles of on time project delivery within budget range, as well as a strong and robust regional user community of over 35 Accela customers, including.

Compared to other vendors, Accela and the Civic Platform stand out from the competition because we are:

- Dedicated to innovation and partnerships.
- The only Land Management solution that is 508 Compliant.
- The only Land Management solution that supports multiple languages out-of-the-box with our language packs.
- Over 30+ years of experience in Land Management solutions.
- The first Land Management solution to offer side-by-side and overlay comparison Electronic Document Review functionality.
- The only vendor that ships Bing maps as part of the GIS offering.
- Committed to creating discrete spaces for departments and workgroups. Building and Planning, for example, should never have to share a module just because they both issue permits. With Accela, each has their own module as well as controlled access for others as needed, and with no limit to the number of solutions.
- The industry's most robust business rules engine defines integrated workflows in Accela solution. Agency users do not need any duplicate entry branching and looping back in the workflow.
- The industry's only data and document global indexing engine that enables powerful global search capacity. Staff and customers can enjoy quick and ease data access across the agency.
- The only vendor with a fully open platform for developers to build civic engagement apps that extend Accela solutions across all ecosystems, including Apple, Microsoft, and Android.
- The home of an efficient Customer Success team exclusively tasked to ensure that customers achieve success with the solutions we implement.

## Plan Check Tracking

Our Civic Platform delivers a complete end-to-end solution for tracking and managing the most critical regulatory functions – permitting, licensing, and more with our Electronic Document Review functionality. Designed to fit seamlessly into a project workflow, EDR allows you to track your important documents every step of the way or assign new tasks or deadlines directly using Accela Automation's powerful workflow designer.

## Fees

With Accela's Civic Platform, City system administrators can easily create new fee schedules; search for or modify existing fee schedules in a few easy steps. Additionally the City can have specific fee schedules for particular modules that are specific to that module and even create multiple versions of fee schedules that relate to effective dates. Drop-down lists allow end users to select which fee schedule and version to apply for fee calculations.

## Web Portal

Accela's Citizen Portal is a customizable Web-based application that works with Civic Platform applications or databases to provide citizens with on-line access to government services and information 24/7. From application to renewal, to payment of fees, application tracking, updating, document review, notification alerts or scheduling inspections, the City can decide what functionality it wants to provide to the public.

## 4.1.1 Land Management

### **Build better communities by moving from plan consideration to Certificate of Occupancy faster**

Accela, our partners, and the developer community have the capability to build, configure, deploy and manage civic solutions and applications. Accela Automation is the heart of Accela's Civic Platform, and it is surrounded by a complete set of platform services that address development and customer lifecycles. Whether installed on premise or in the Cloud, the Civic Platform provides a complete infrastructure to automate and streamline civic processes related to Land Management, Licensing and Case Management, Asset Management, Finance & Administration, Environmental Health and Safety, Legislative Management, Recreation and Resource Management, Right of Way Management, and Citizen Relationship Management.

Accela's Land Management makes it easy for state, county and city agencies of all sizes to coordinate activities for the consideration and approval of land use and building permits, inspections and enforcement to meet your jurisdiction codes. The solution saves time, increases productivity and connects government agencies to the businesses, professionals and citizens they serve.



### Land Management



**Exhibit 4: Accela’s Civic Platform architecture allows the creation of cloud solutions to serve government, the business community and citizens**

**What does the Civic Platform make possible?**

- Transforms civic participation through mobile and cloud-based technology
- Empowers collective action for better and healthier communities
- Brings trust and flexibility to citizen interaction with government
- Streamlines processes and handles data management with ease
- Revolutionizes the way contractors engage with the government
- Creates open space for innovation

Accela’s Land Management:

- ➔ **Streamlines planning and development.** Regulate the growth of your community and ensure that existing and proposed land use complies with zoning designations, building codes and other laws. Track and manage entitlements, historical and environmental issues, plan and departmental reviews from planning through certificate of occupancy. The Land Management Best Practice Templates allow an agency to deploy e-government services right out of the box, including pre-configured workflows, data structures, fees, business logic, standard reports, and web forms. These templates are a culmination of over 34 years of experience of Accela working with government agencies to streamline and make government services more efficient.
- ➔ **Simplifies the permit process.** Manage your entire permitting process including application check-in, plan reviews, fee calculation and collection, inspections, sign-offs, task lists, and more. Easily manage both the proposed plan and the relationships to the project – including imposing restrictions on

transactions, property or individuals until compliance measures and fees are satisfied.

- ➔ **Engages your citizens 24/7/365 days of the year.** Accela's Citizen Portal and IVR capabilities provide quick and easy access to information about permits and inspections directly from any telephone, web browser, or mobile device.
- ➔ **Visualizes information** with built-in GIS capabilities, which deliver mapping and routing functionality to the enterprise. This overlays government data onto GIS maps, and allows customers to initiate and manage permit activities from a geospatial platform.
- ➔ **Provides online access** to save time for agency staff out in the field. Productivity apps, such as Analytics, Inspector, and Contractor Central, connect and equip agency field workers with the right mobile device for the job.

For more details, visit <http://www.accela.com/solutions/land>. We are also on [Facebook](#), [YouTube](#), and [Twitter](#).

#### 4.1.1.1 Land Management Solutions

Specific solutions include:

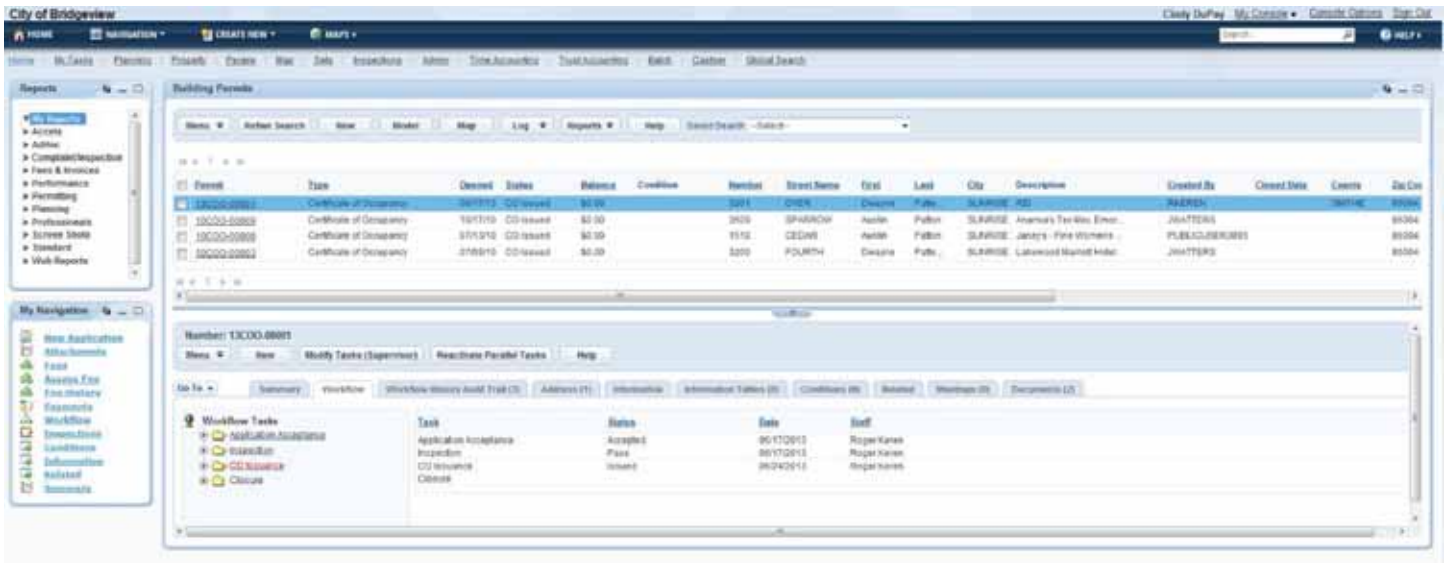
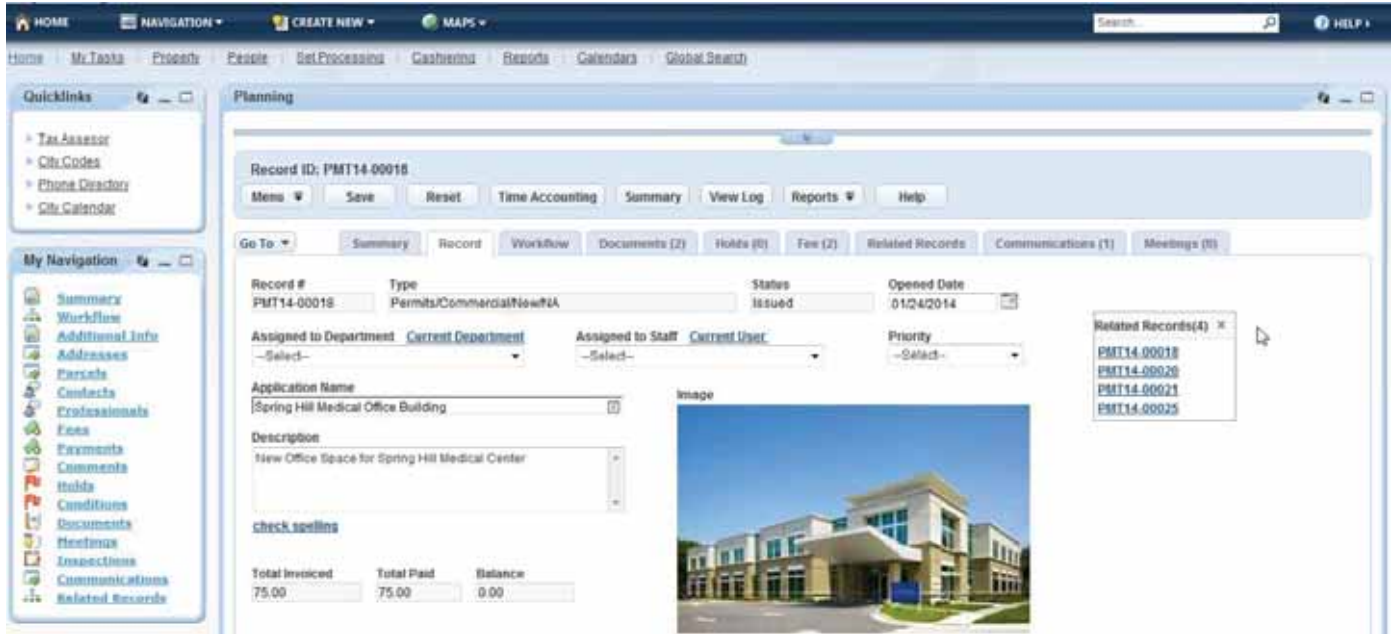
- ➔ **Planning and Zoning** – Provide your agency with a comprehensive solution for electronic plan submittal, review, public notification and approval of land use. Manage designated land use based on zoning and building laws. Track zone changes, variances and easements. Assign documents to multiple departments for parallel review that allow plans to move quickly to certificate of occupancy.
- ➔ **Permitting and Inspection** – Provide online customer permitting application processing and payment, and manage overall processing flow, data collection, fee collection and inspections for ICC Building Code compliance. Inspectors can interact with complete case information, access their daily inspection schedules, create new cases in the field, and submit inspection results remotely. Our award-winning GIS integration helps your staff map their day, optimally routing their visits to bring the business of government from behind the counter directly to the public.
- ➔ **Code Enforcement** – Enable your code officers to create and manage cases using their mobile devices – whether they are performing proactive sweeps or following up on issues reported by police, fire professionals, citizens or other community partners. Integrated picture mark-up makes it easy to snap a picture to include visuals of difficult to explain situations in field reports.

For video demonstrations, visit:

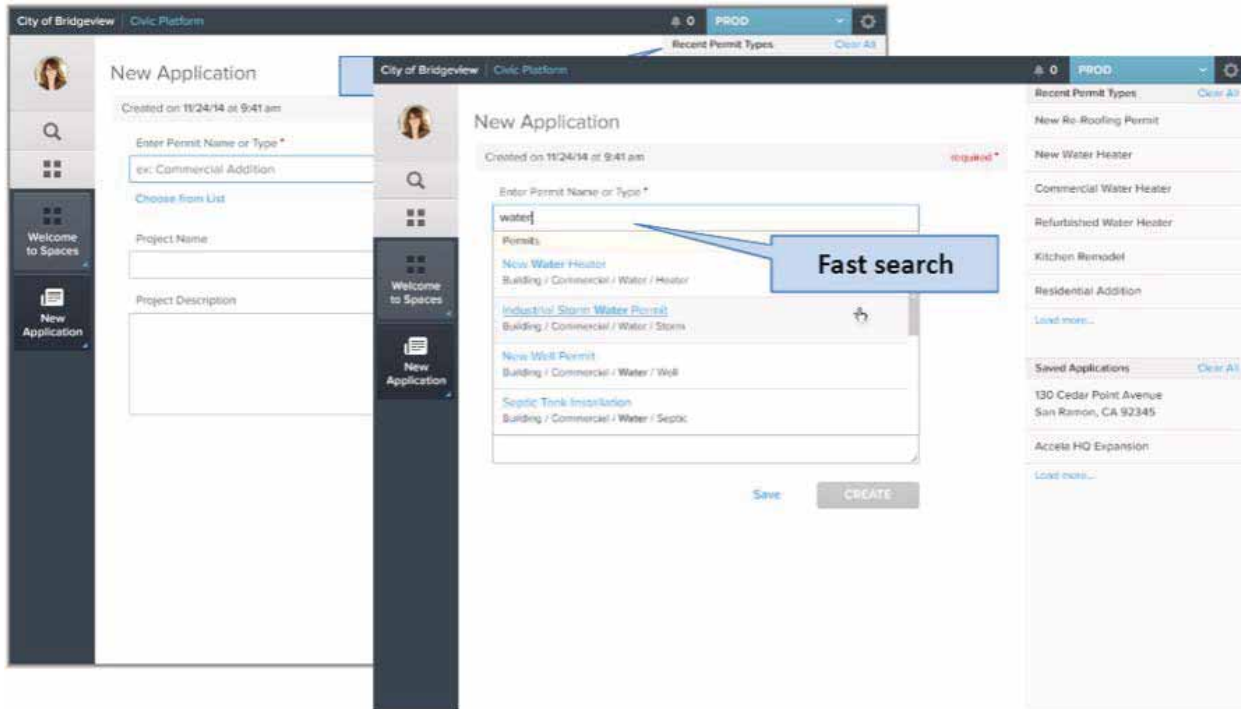
<http://bit.ly/1OxHRCT>

See how our Civic Platform empowers an agency's service request and code enforcement processes at <https://vimeo.com/10236715>

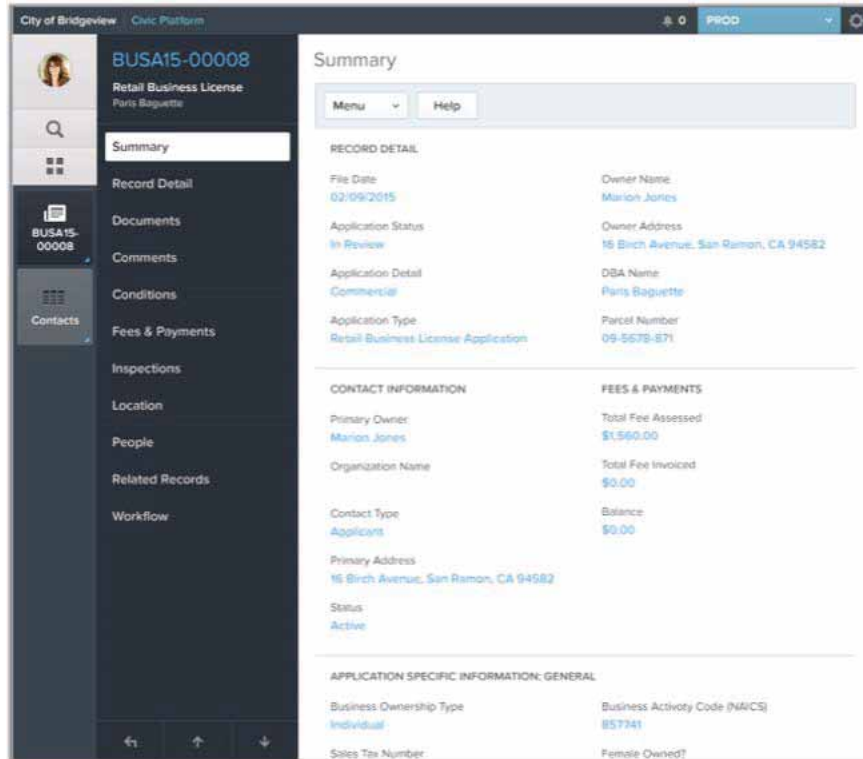
The flexible configuration of Land Management lets customers define and manage the sequence and requirements of the hundreds of steps involved in a workflow, including initial applications, plan reviews, code enforcement, fee calculation/collection, inspections, notices, and approvals. The solution manages all types of regulatory activities—one-time processes such as residential construction permitting and pesticide application permitting, or annually renewable activities such as elevator permits and air quality permitting.



**Exhibit 5: Land Management Certificate of Occupancy**



**Exhibit 6: Intake Form and Search**



City of Bridgeview Civic Platform

**BUSA15-00008**  
Retail Business License  
Paris Baguette

Summary

Record Detail

Documents

Comments

Conditions

Fees & Payments

Inspections

Location

People

Related Records

Workflow

Summary

Menu Help

RECORD DETAIL

File Date 02/09/2015	Owner Name Marion Jones
Application Status In Review	Owner Address 16 Birch Avenue, San Ramon, CA 94582
Application Detail Commercial	DBA Name Paris Baguette
Application Type Retail Business License Application	Parcel Number 09-5678-871

CONTACT INFORMATION

Primary Owner Marion Jones	Organization Name
Contact Type Applicant	Primary Address 16 Birch Avenue, San Ramon, CA 94582
Status Active	

FEES & PAYMENTS

Total Fee Assessed \$1,560.00
Total Fee Invoiced \$0.00
Balance \$0.00

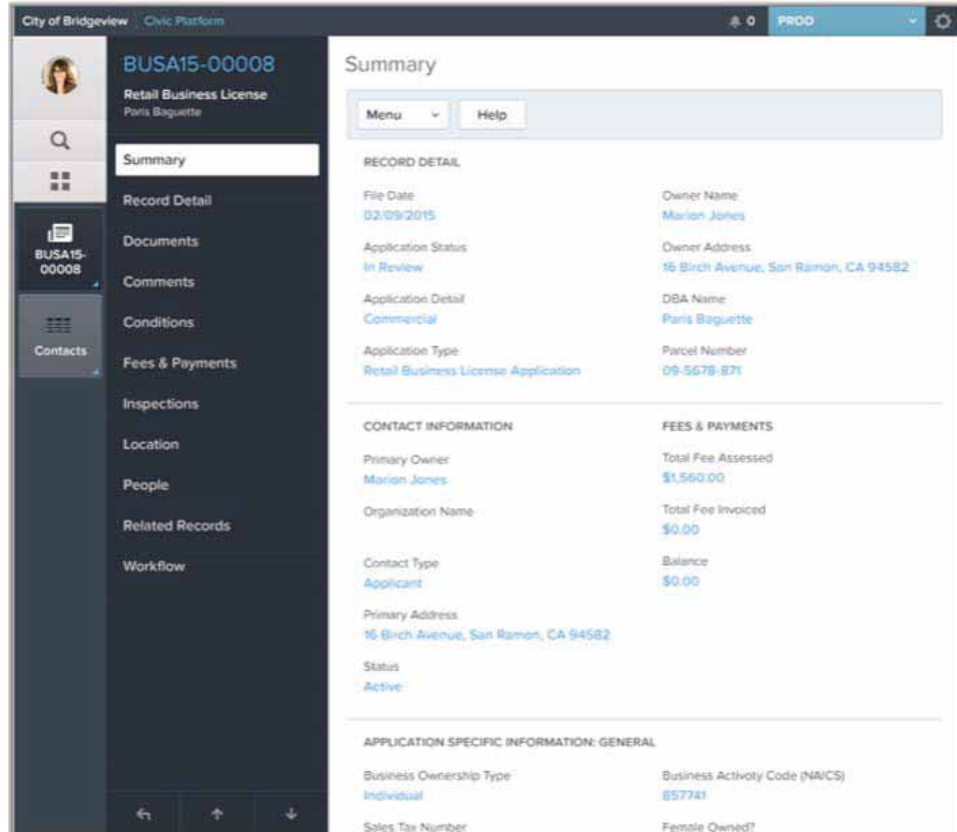
APPLICATION SPECIFIC INFORMATION: GENERAL

Business Ownership Type Individual	Business Activity Code (NAICS) 857341
Sales Tax Number	Female Owned?

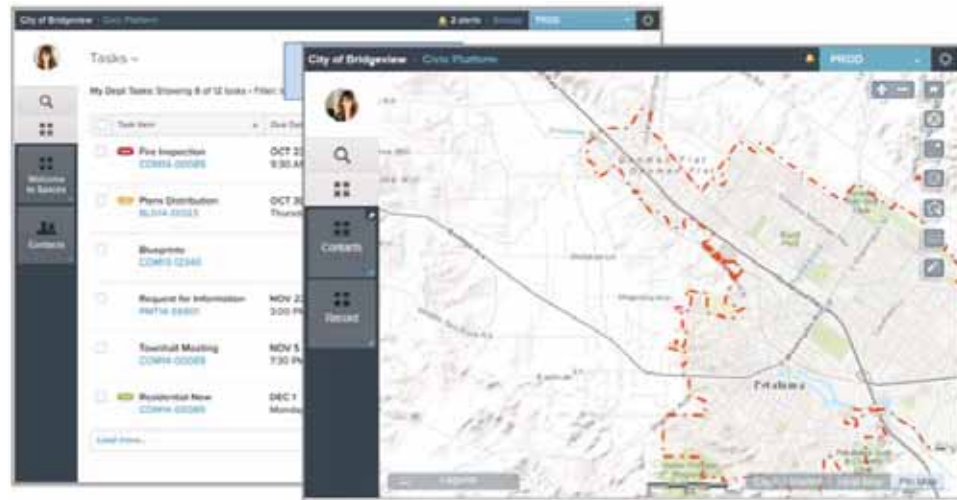
**Exhibit 7: In-Process Application**

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**Exhibit 8: In-Review Application**



**Exhibit 9: The Map Dashboard allows users to start transactions, review spatial data, view records, create new geometry, generate routes, and much more**

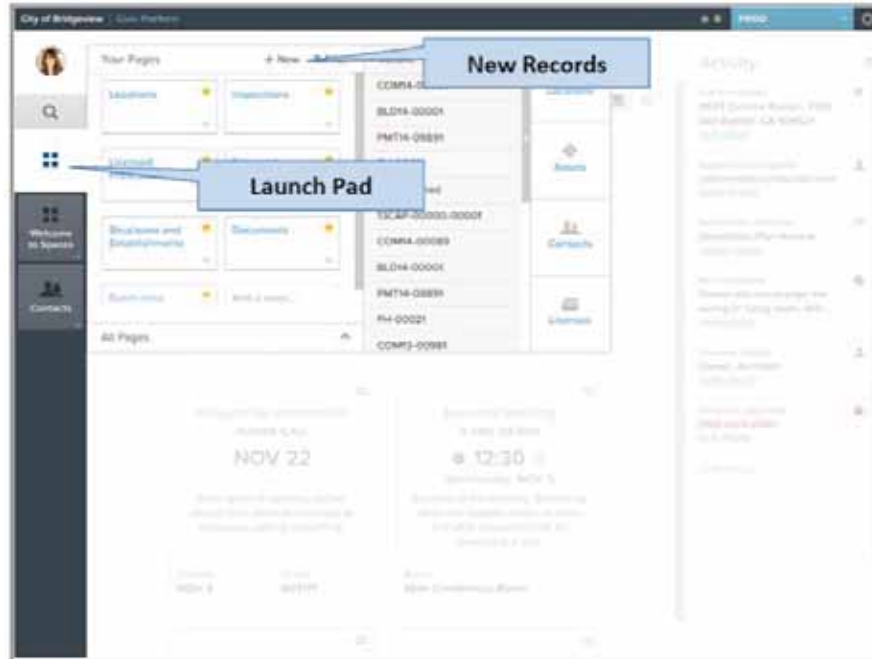


Exhibit 10: Using the Launchpad, Agency staff can quickly and easily jump to pages—from a single location.

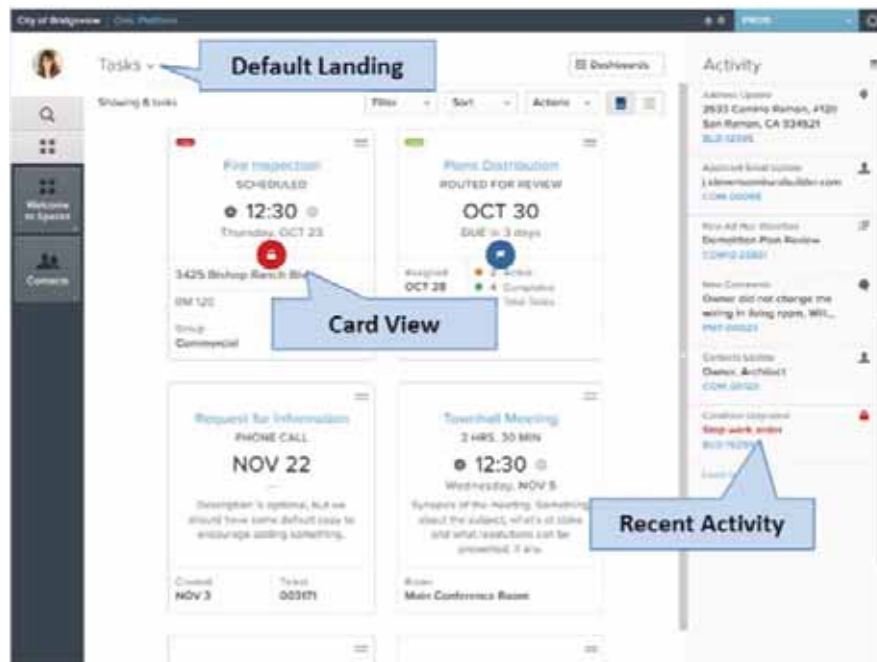


Exhibit 11: MyTasks Dashboard provides at-a-glance information, filters, and recent activity pertaining to records in a user's task list.

## Certificate of Occupancy

### City of Bridgeview

502 E. 9TH STREET

Bridgeview, AZ 86001 Phone: 888-722-2352

This certificate is issued pursuant to the requirements of the adopted building code, certifying that at the time of issuance this structure was in compliance with the various ordinances of the City Of Bridgeview regulating building construction and use.

July 09, 2013

Permit Number: 13COO-00001

Property Owner: SMITH JOHN AND JANE

Owner Address: 3201 DYER ST  
SUNRISE, AZ 86004

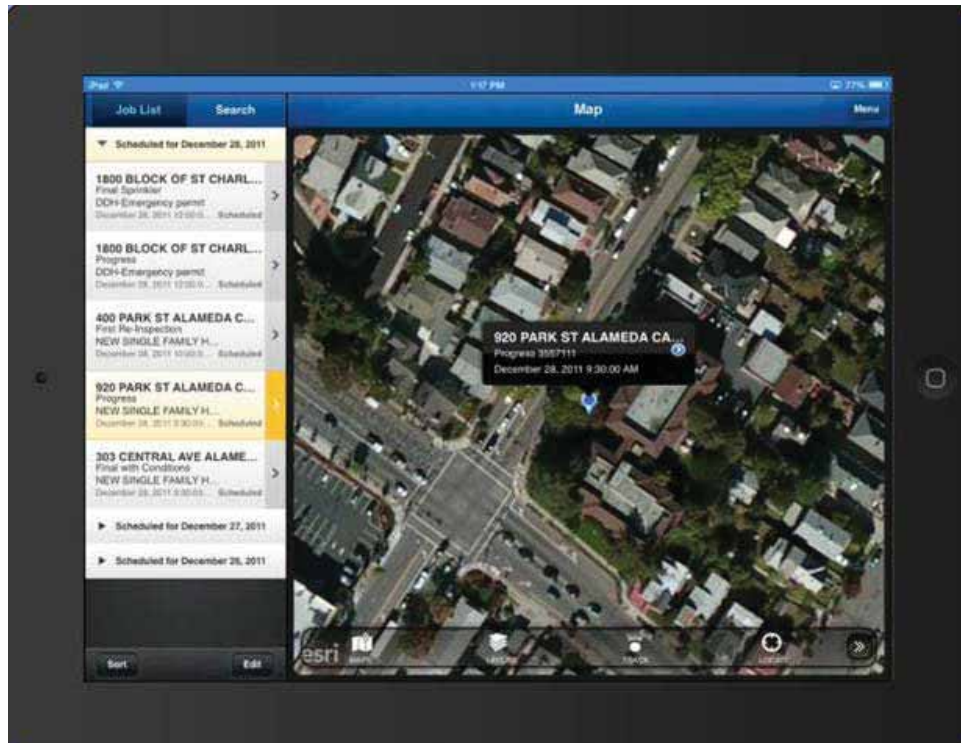
Site Address: 3201 N DYER  
SUNRISE, AZ 86004

Type of Building: Retail

Certificate Requested For: Change of Business

THIS CERTIFICATE ISSUED PURSUANT TO THE  
REQUIREMENTS OF THE STANDARD BUILDING CODE  
CERTIFYING THAT AT THE TIME OF ISSUANCE THIS  
STRUCTURE WAS IN COMPLIANCE WITH THE VARIOUS  
ORDINANCES OF JURISDICTION REGULATING BUILDING  
CONSTRUCTION OR USE.

### Exhibit 12: Example Generated Certificate of Occupancy



**Exhibit 13: Land Management Inspection Details from Mobile Device**

#### 4.1.1.2 User Interface

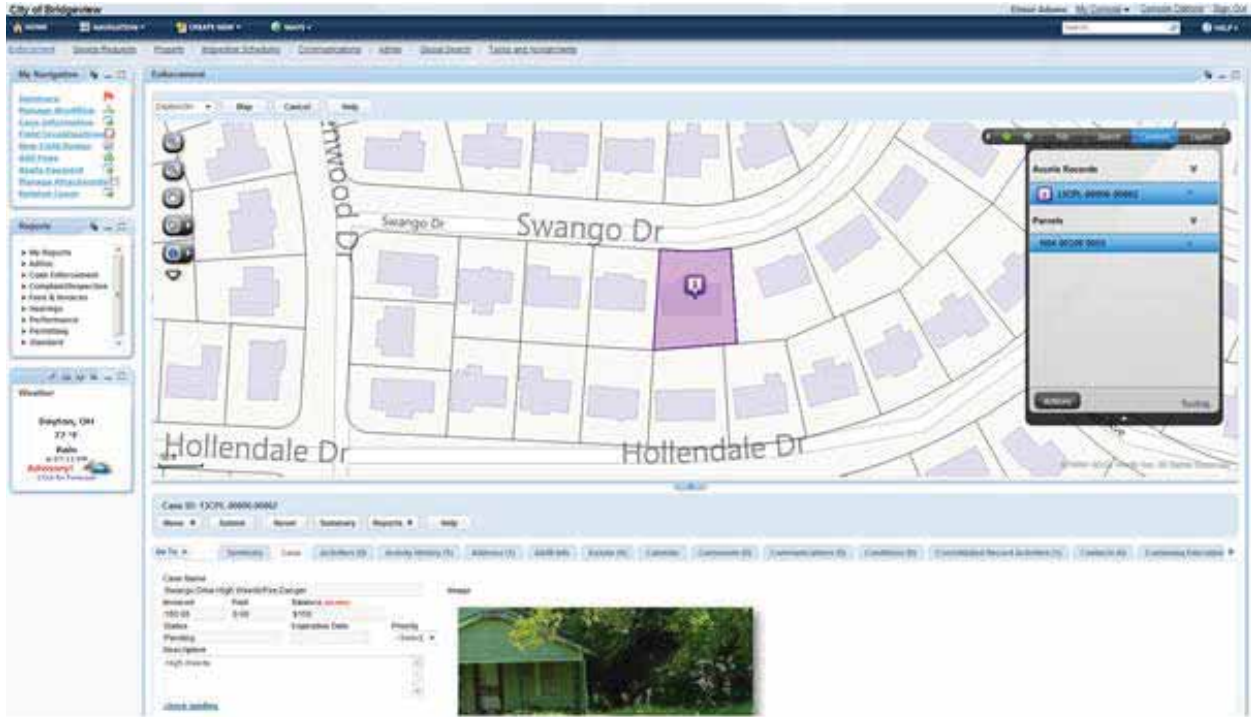
Accela’s web-based Civic Platform user interface shows several screens on a single page and are configured to meet the needs of individual user roles.

Among the most frequently used screens are those presenting alerts and notifications, upcoming and overdue tasks, performance-based charting, and frequently used data queries. When used with Accela’s GIS capabilities, government activity data is viewable through a map screen, confirming the solution’s versatility in how data is represented.

When used with Accela’s mobile capabilities, all land management activity data is available to field staff, enabling a full mobile field office solution. Inspector assignments, schedules, routes, status reports, and inspection results are all logically presented. Data collected in the field is recorded electronically and uploaded to the solution for immediate availability throughout the enterprise.

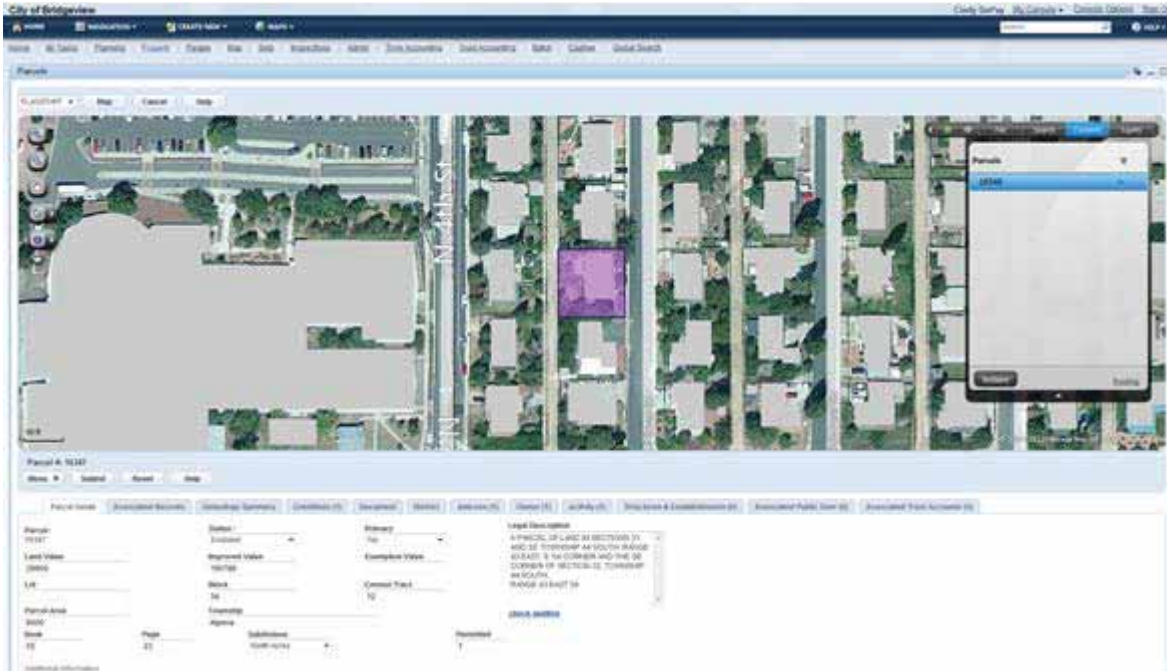
Further extending Land Management offerings to the public are Accela’s Citizen Portal and IVR solutions, which promote true government transparency and citizen self-service by bringing government services to the public 24/7. Self-service options may include property information, online applications, fee collection and inspection scheduling. In eliminating the need for in-person and

paper processing, these solution components unite governments and their constituents through accessible technology while reducing costs.



**Exhibit 14: Accela Land Management Code Enforcement screen**

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**Exhibit 15: Accela Land Management Parcel screen**

#### 4.1.1.3 Solution Attributes

The overall flexibility of Accela’s Civic Platform is supported by business intelligence that maintains vigilance over these processes. Among the many solution attributes are the following features:

- **Audit Trails** document changes made to critical areas;
- The solution’s **Business Rules Engine** offers action/inaction based automation capabilities;
- **Required Conditions** confirm that all requirements are met prior to an activity occurring;
- **Fees and Cashiering** functionality employs many GAAP principles, offers full account reconciliation, and may be used with cashiering solutions or used with cash drawers to complete the payment process for all fee-based activities;
- Abundant use of **Reference Data Tables** appropriately reuse solution data, eliminate duplicate data entry, and reduce the chance of errors; and
- Robust **Administrator Tools** support ongoing management of data and processes, ensuring all activities adhere to the specific business rules in place.

## 4.1.2 Electronic Document Review (EDR)

With Accela's Electronic Document Review, any record may have a plan review without the hassle of creating a separate plan review record for each permit – it is built in and easy.

Accela's Electronic Document Review (EDR), also known in the industry as Plan Check Systems, included and integrated at no additional cost, provides a comprehensive enterprise document and plan review and management solution for various types of regulatory documents – plans, architectural drawings, etc. – required to be submitted in support of a variety of projects, applications and renewals.

Accela EDR is designed to enable review staff to incorporate document review and markup directly into the existing Civic Platform processes that automate, organize, and track reviews. This adds end-to-end management of electronic documents assuring adherence to agency policies and codes. Electronic Document Review is a fully integrated feature within the Civic Platform that leverages different technologies to the agency's choice, enabling users to review regulatory documents faster and more easily. For the City of Paso Robles, we recommend the agency take advantage of Adobe Acrobat Pro, the classic plan review software that most Accela clients use to enjoy the full spectrum of benefits of Accela EDR.

Accela's Civic Platform APIs and third party adapters allow agencies to use any electronic document review solution available in the marketplace.

Primary features of Accela EDR include:

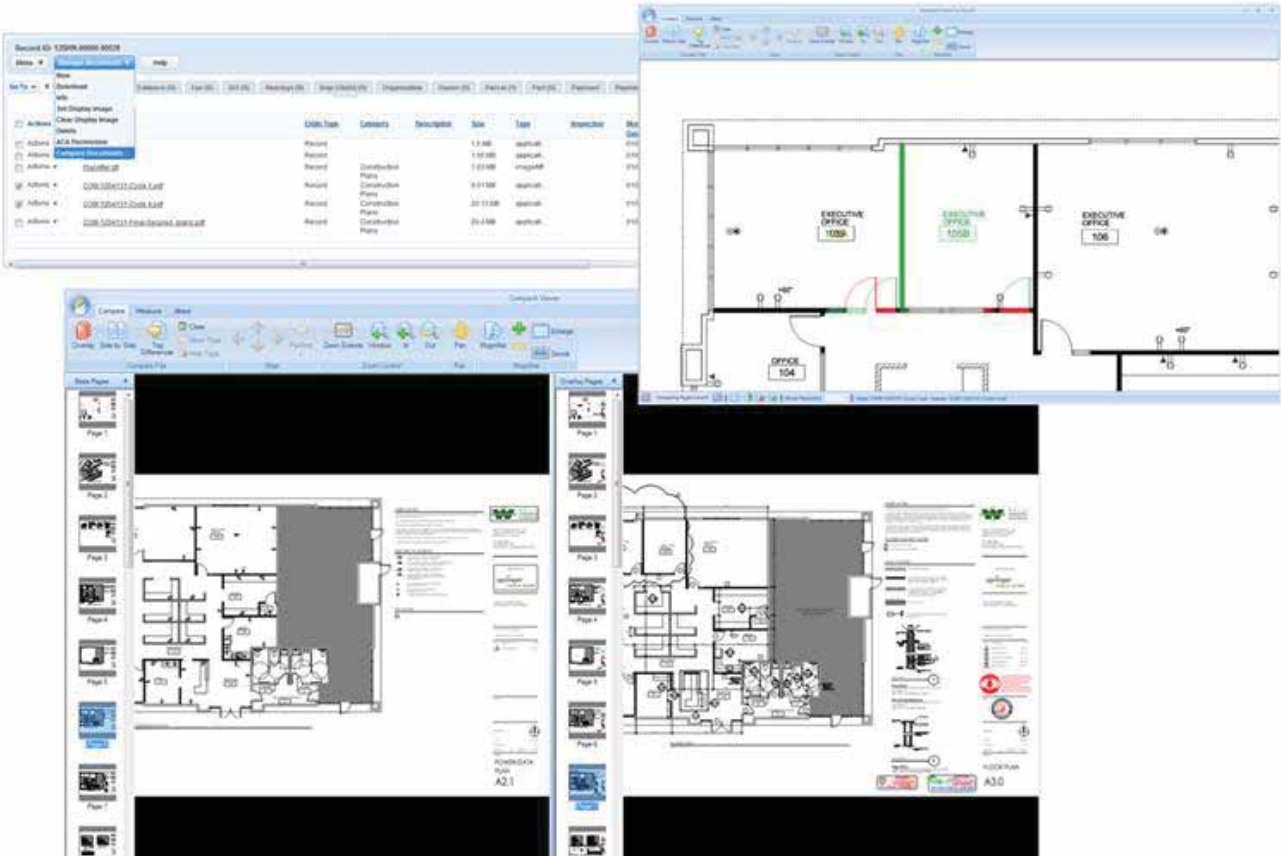
- ➔ Side-by-side comparison display
- ➔ Overlay comparison display with one document transparently overlaying the other
- ➔ Manage security profiles for users and to check-in and markup documents
- ➔ Manage resubmissions of documents and versioning
- ➔ Upload multiple documents simultaneously
- ➔ Alert internal users of resubmittals
- ➔ Ability to track progress of reviews
- ➔ Alert public users that a document has been reviewed, approved, or require revisions
- ➔ Support hyperlinks to documents for one click access
- ➔ Provide configurable attribute fields by document type
- ➔ Store document comments in the Civic Platform and generate correction notices
- ➔ Assign documents to review outside of a workflow

### **Side-by-Side and Overlay Displays**

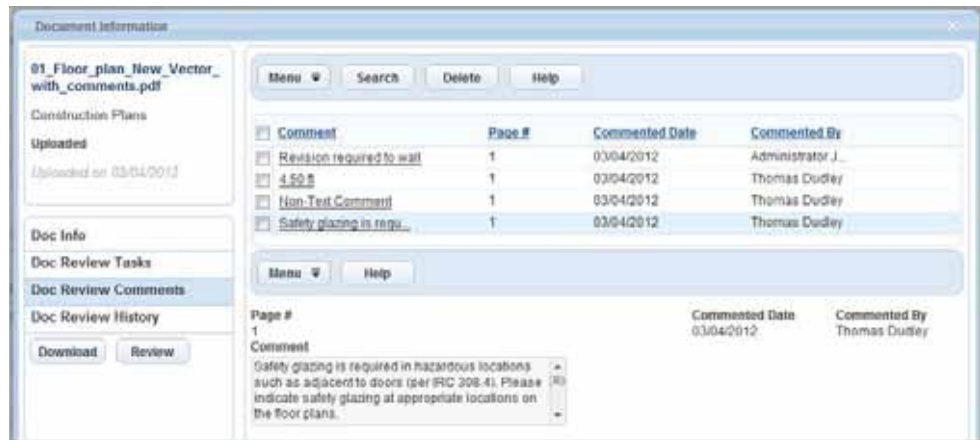
User defined colors easily identify what has been added and what has been removed on each page. The user can isolate the objects they are looking for using the Differences tool bar. For example, users may view only differences, deleted objects, added objects, or objects both documents have in common. In Overlay mode, the user can tag differences to create placeholders that can be quickly revisited and examined more closely or to indicate where the annotations and revisions may be required. The multi-page documents viewing capability allows for easy transition between pages, comparison between documents where the pages do not align, and comparison of a single document against itself. Additional features include the ability to zoom, rotate, magnify, measure, and adjust resolution.

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**Exhibit 16: Accela Civic Platform's Electronic Document Review has been specifically engineered to support the comparison of large, multi-page PDF documents, a capability unparalleled in the industry**



**Exhibit 17: Accela's Electronic Document Review allows users to review tasks, comments, and history from all reviewers**

“There are environmental benefits, achieved by not having to print multiple copies of different versions of thick site development plans. Countless trips to the government center are also eliminated. Plans can be submitted via email around the clock, adding another layer of convenience for applicants. The new process is also much quicker, saving time due to a more coordinated city response.

Government Technology --  
Charlotte, NC Digitizes  
Commercial Planning  
Process

With Electronic Document Review, users can attach single or multiple PDF documents to a record, and then assign them for review to one or more reviewers, who are able to access and manage their assigned documents either via the record or via their individual My Tasks screen. Users can also use the Global Search screen to search for specific documents as needed. Attached PDF documents can be opened in Adobe Acrobat Pro directly from the Civic Platform. Once opened, users can utilize Acrobat Pro’s easy-to-use annotating tools to review, comment, and mark up documents.

Accela provides a set of standard review stamps as a quick start feature, allowing users to stamp plans. When the review is done, the commentary and annotations are saved back to the Civic Platform application server. The toolbar provides configurable online access to [ICC eCodes](http://www.icc.org), the world’s primary source of regulatory design and construction compliance standards, as well as state and local codes as required, giving reviewers the ability to look up codes and regulations and use standard copy/paste functionality to cite regulations via annotations added to the PDF. To better manage the life cycle of documents, a Document Audit log is available. It records all changes made to attached documents, including the moment a document is attached to a record, as well as annotations and comments that have been added/modified and saved.

For more details, visit <http://www.accela.com/electronic-document-review>.

**Exhibit 18: Agency challenges and the benefits of using Accela's Electronic Document Review**

Challenges	Electronic Document Review	Results
<ul style="list-style-type: none"> <li>▪ Reduced budgets</li> <li>▪ Staffing constraints</li> <li>▪ Doing more with less</li> <li>▪ Meeting public demands for speed, access, and transparency</li> <li>▪ Commitment to green solutions</li> <li>▪ Physical storage of large plans</li> </ul>	<ul style="list-style-type: none"> <li>▪ Integrated, single-source solution for document submission, review, markup, and management</li> <li>▪ Leverages key features of the Civic Platform</li> <li>▪ Introduces document review and markup functionalities</li> </ul>	<ul style="list-style-type: none"> <li>▪ Documents where and when users want them</li> <li>▪ Seamless support for third-party EDMS for storage and retrieval of documents</li> <li>▪ Flexible solution that supports a variety of agency-driven standards for document submission and review</li> <li>▪ Collaborative plan review process facilitated via Accela Citizen Portal</li> </ul>

### 4.1.3 Accela Mobile

With the widespread adoption of mobile devices, we offer mobile capabilities for iOS or Android-based smart phones and tablets to bring processing to the field through our cloud-based Civic Platform.

Our proven solutions for operational efficiency and civic engagement through mobility apps combine to provide extensibility by employing a dynamic cloud-based platform to support the needs of both agency employees and their user community.



**Exhibit 19: Accela solution offerings can be deployed on diverse mobile devices including laptop, tablet and smartphone.**

Accela is the only vendor in our market with a fully open platform for developers to build web, mobile, and social solutions across all ecosystems, including Apple, Microsoft, and Android, with a free developer community and software development kits with sample code for rapid app development.

Mobility is more than an application—it is a complete strategy central to our government-centric development efforts. Our mobile strategy is to develop role-specific productivity and engagement solutions for every role in government, on every platform, while allowing public agencies to leverage our Software Development Kit.

We are committed to providing industry-leading applications on the “big three” platform providers of Apple (iOS), Google (Android) and Windows (Mobile and Windows OS). Furthermore, our applications are designed to work natively in tablets, smartphones and laptop operating systems leveraging those operating systems. We welcome agencies to try these applications on their chosen mobile devices as all of **our mobile applications include a complementary Preview Mode** that allows users to experience the features and functionality that can help empower their field personnel to deliver a higher level of service to your constituents.

“Empowered citizens are increasing demand for more government transparency... ushering in the age of the citizens. Social and mobile technologies have recast citizens’ expectations for service...”

*The Age of The Citizen  
Forrester Report  
June 2014*

The overall approach and maturity of our mobile strategy relative to all other vendors is evident based on the following:

1. **Accela is the only vendor in our market with role-specific apps publicly released for inspectors, code enforcement officials, work crews, contractors, and Executive/Department Managers.** To see a current list of Accela’s mobile apps, visit <http://www.accela.com/civic-apps>.
2. **Accela is the only vendor in our market that has iOS and Android apps that all include a preview feature, allowing anyone to download apps from any of the major app marketplaces for testing purposes.**
3. **Accela has an extremely aggressive development and release schedule.** The iOS version of Accela’s Inspector app benefited from rapid releases, and works on the Android operating system. The ability to support rapid release schedules across multiple device operating systems is important as mobile hardware and software is continually evolving.
4. **Accela is the only vendor in our market with a published mobile application development kit allowing third party developers, including current clients, to develop custom mobile applications to work with our Civic Platform.** We understand mobile applications are an environment supporting evolving creativity and innovation. Accela makes it easy for third party developers to build custom mobile apps that work against our Civic Platform.

*Read how Westminster, CO cut manhole inspection time by 90 percent at <http://bit.ly/RiF6MZ>.*

#### 4.1.3.1 Apps built on the Civic Platform

##### Create Your Own Apps



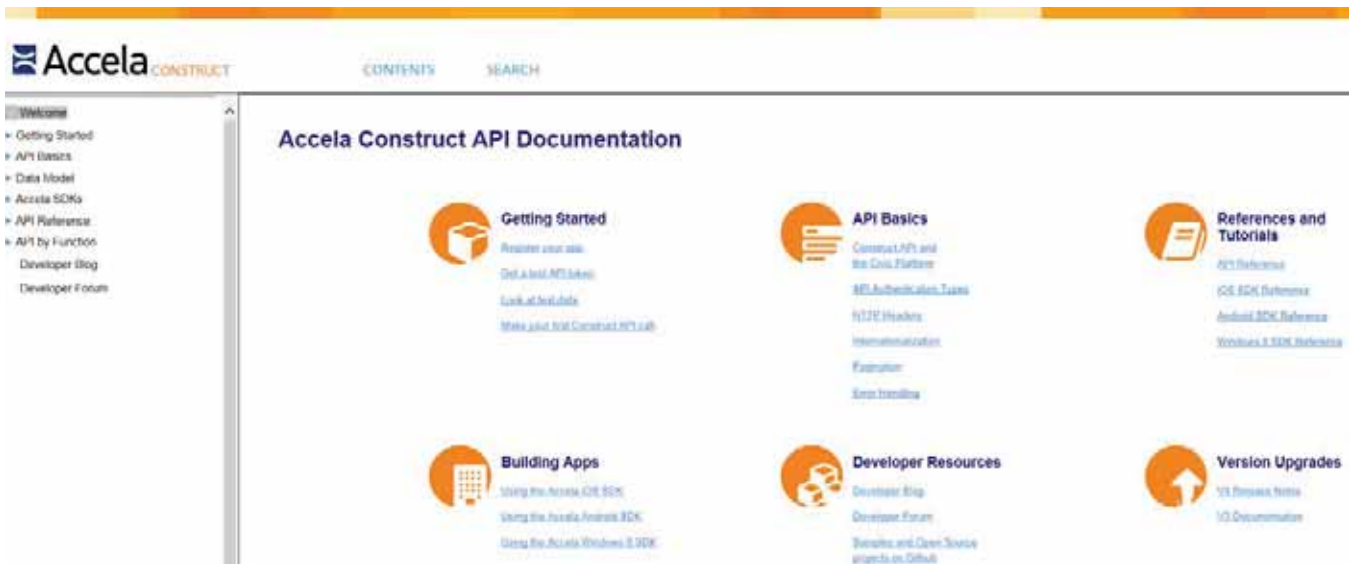
The core of our software platform is powered by open source technologies, and Accela, developers, and partners are working together to build and deliver apps and services that improve productivity for professionals, address community issues, and connect and engage citizens with their governments. We are working with organizations like [Code for America](#) and [Tumml](#) to spur innovation and build a vibrant ecosystem around our platform.

We make it easy for developers and partners to build, sell, and deploy mobile and social applications to engage industry professionals and citizens in their communities. With Accela’s Mobile Software Development Kit (SDK), we provide the ability for developers and partners to build, sell, and deploy mobile and social applications to engage industry professionals and citizens in their communities. This improves the quality of the applications and fosters usage.

### 4.1.3.2 Developer Community

Accela’s Developer Community includes people from across the nation—from individual developers, to software companies, to government IT professionals. They are actively developing and publishing apps for the Civic Platform, many of which are available today at app stores (right alongside the Accela-built apps). Each SDK includes:

- ➔ APIs
- ➔ Getting Started Guide
- ➔ Platform Libraries
- ➔ Accela Civic Platform Test Environments with recommended process configurations
- ➔ Sample Code
- ➔ Sample Apps
- ➔ Documentation



**Exhibit 20: Accela’s Mobile SDK can be downloaded at <https://developer.accela.com/> after a quick and free registration process.**

The following are samples of the modern, innovative, easy to use solutions built by Accela and our developer partners, both responsive HTML5 Web Apps as well as native mobile apps for Apple, Android, and Microsoft. Each of these solutions are fully integrated with the Civic Platform, providing extended capabilities and often targeted, task specific point solutions for the staff and citizens of agencies enjoying the huge benefits of the Civic Platform.

Accela's Construct has 1,200+ registered developers using 350+ publicly available APIs.

Some of these solutions are fully dependent on the Civic Platform for use, while others are amazing in their own regard, but become much more valuable as an integrated extension to the Civic Platform. All serve as great examples of the power and flexibility of the Civic Platform and its Construct API in supporting innovative solutions by third parties as well as agencies themselves.

### 4.1.3.3 Productivity Solutions

#### Analytics App

Accela provides a free Analytics app for iOS devices that allows agency staff to have real-time access to role-specific information on an iPad. The Analytics app leverages information from the Civic Platform database and displays trends and activities happening within an agency. The data can be displayed in graphical format allowing users to interact with it and drill into specific records for details. The Analytics app provides a number of ways for registered Civic Platform users to easily access the information they need via the Home screen, Watch Lists, Charts and Maps:



- ➔ **Home** – The Home screen provides an integrated dashboard of key performance indicators including charts of activity over designated time periods, displays average and daily total values, and a map view showing the locations of permits, licenses and other records using color-coded push pins.
- ➔ **Watch Lists** – The Watch Lists screen allows creation of a customized list of specific items of interest. Lists can be easily modified or removed without affecting any back-end data.
- ➔ **Charts** – The Charts screen includes large, easy to read charts displaying application and inspection trends. Users can choose a timeframe of interest or other selection criteria to customize the display. Charts allow administrators to see how their organization is performing over time. Drop-down menus allow user-defined searches, and color-coded lines in the charts represent the various kinds of data selected, such as application trends and inspections workloads.
- ➔ **Maps** – The Maps screen displays locations of records on a map using color-coded pushpins to differentiate building permits, code enforcement cases, service requests, and business licenses. Map markers linked to the pushpins provide additional high-level record information.

iOS users reap the benefits of the Civic Platform's tight integration with Esri's ArcGIS Server. This connects to agency map data (published from ArcGIS Server or supplied by Esri's ArcGIS Online cloud infrastructure). Esri's powerful maps are infused into the Civic Platform in two ways—via Esri base maps (such as street, satellite or topographic views); and map overlays. The overlay can depict zoning impacts (e.g., color-coded city limits, special assessment districts, flood zones, school zones) as well as

user-selected physical assets (such as hydrants, manholes or utility lines) in superimposed layers.

- ➔ Analytics' rich mapping environment allows government managers and field-based workers to better understand the terrain, environment or other attributes affecting current projects. For instance, specific functions allow a fire captain to view maps showing hydrants and gas lines, a building inspector to utilize flood zones or topographic information, and a public works employee to see locations of manhole covers and storm drains.

### Accela Analytics

[View More by This Developer](#)

By Accela, Inc.

Open iTunes to buy and download apps.



#### Description

Preparing for a big meeting? Planning your resource allocation for the week? Accela Analytics lets you easily access and analyze the Accela Automation® enterprise data behind your government operations — anytime, anywhere, and on the go from your iPhone or iPad. The dashboard highlights trends and activity for permit applications, licenses

[Accela, Inc. Web Site](#) [Accela Analytics Support](#) [Application License Agreement](#) [More](#)

#### What's New in Version 7.3.3

- Bug Fixes

[View in iTunes](#)

This app is designed for both iPhone and iPad.

#### Free

Category: Business  
Updated: Nov 22, 2014  
Version: 7.3.3  
Size: 69.9 MB  
Language: English  
Seller: Accela, Inc.  
© Accela, Inc. 2014  
Rated 4+

**Compatibility:** Requires iOS 6.1 or later. Compatible with iPhone, iPad, and iPod touch. This app is optimized for iPhone 5.

#### Customer Ratings

We have not received enough ratings to display an average for the current version of this application.

All Versions:  
★★★★ 10 Ratings

#### More by Accela, Inc.



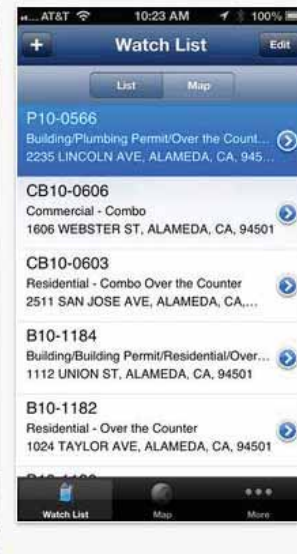
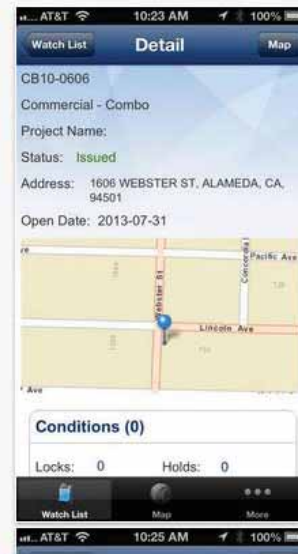
Accela Inspector  
[View in iTunes](#)



Accela Code Officer  
[View in iTunes](#)

#### Screenshots

iPhone | iPad



**Exhibit 21: Analytics App**

The Analytics app requires a Mobile Office license. *To learn more, visit <http://www.accela.com/civic-apps?id=519>.*

## Inspector App



Accela’s Inspector app provides permitting, licensing, and code enforcement professionals with functionality designed to perform onsite inspections or investigations using their smartphone or tablet. Integrated with the Civic Platform, Inspector connects mobile workers to their back-office accounts, enabling them to work from their desk, vehicle, or on site using their preferred device. Users can perform a complete onsite process – from initial inspection to submittal - and can also view and update their inspection details including checklists, attachments and comments.



Inspector provides numerous capabilities for easy and efficient onsite inspection or investigation management, prior to synchronization with an agency’s Civic Platform solution, including:



- ➔ **Comment Management** – For faster access, the app enables inspectors to add custom comments and mark frequently used comments as favorites. The comments section also aggregates all comments entered in any section of the inspection or investigation.
- ➔ **Image Annotation** – Users can take photos, access existing images, and make simple annotations. They can add comments directly to the image. All this saves time and reducing the likelihood of errors in data collection.
- ➔ **Geo-Centric Job List** – In the map view, the job list automatically centers to the user’s current location and displays the nearest jobs on a map.
- ➔ **Batch Updates to Checklist Items** – Checklist items can be updated individually or in batches from the list view. The view can be changed to a detailed view to add more information such as comments, attachments or scores.
- ➔ **Single-Click Calling** – All phone numbers and locations can be accessed with a single click, enabling inspectors to quickly reach primary contacts or other relevant parties.
- ➔ **Free Preview Mode** – The app provides access to a simulated demo agency, allowing agency users to “test drive” the app and become familiar with its full range of functionality prior to using in a live setting.

“We’ve found Inspector as simple to use and as intuitive as the iPad itself. It’s easy to comment and get results on inspections, and the app is very fast and responsive. Being able to take and attach pictures automatically saves our inspectors a lot of time in the field.”

*City of Oklahoma City, OK*



## Accela Inspector

[View More by This Developer](#)

By Accela, Inc.

Open iTunes to buy and download apps.



### Description

The Accela Inspector app gives government agency inspectors and investigators access to a core set of functionality for performing inspections and investigations using their mobile device.

[Accela, Inc. Web Site](#) [Accela Inspector Support](#) [Application License Agreement](#) [More](#)

### What's New in Version 3.2.6

- Bug fixes.

[View in iTunes](#)

This app is designed for both iPhone and iPad.

### Free

Category: Business  
 Updated: Jan 23, 2015  
 Version: 3.2.6  
 Size: 16.6 MB  
 Languages: English, Arabic  
 Seller: Accela, Inc.  
 © Accela, Inc. 2015  
 Rated 4+

**Compatibility:** Requires iOS 6.0 or later. Compatible with iPhone, iPad, and iPod touch. This app is optimized for iPhone 5.

### Customer Ratings

We have not received enough ratings to display an average for the current version of this application.

All Versions:  
 ★★★★★ 13 Ratings

### More by Accela, Inc.

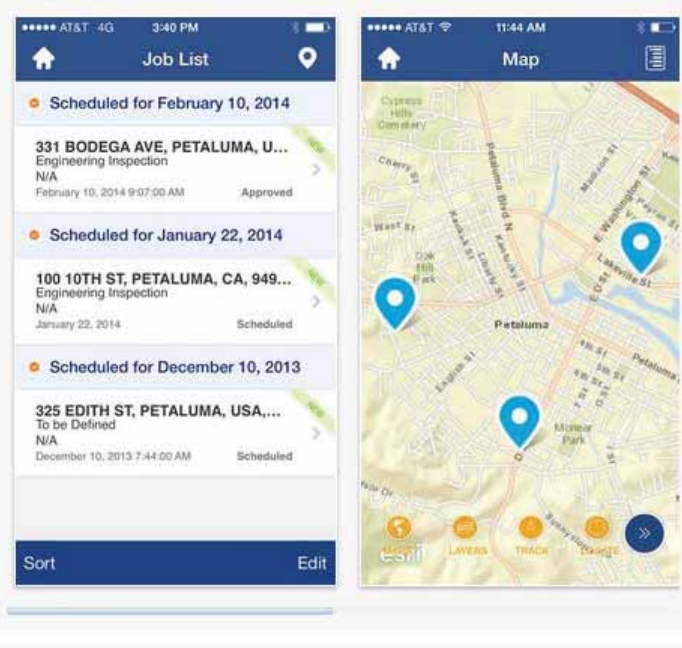


Accela Code Officer  
[View in iTunes](#)



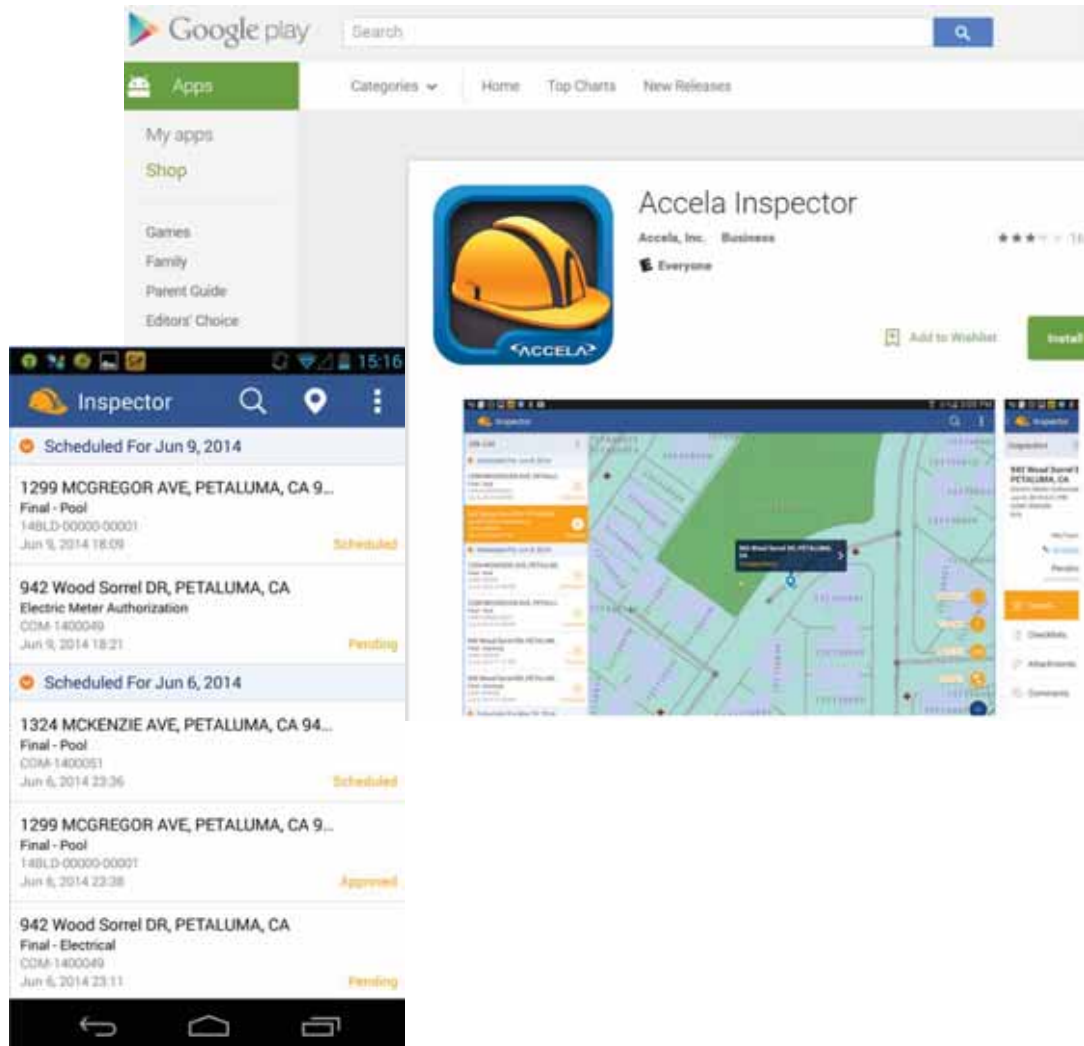
Accela Inspector  
[View in iTunes](#)

### Screenshots



**Exhibit 22: Inspector Map screen on the iPad and iPhone**

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**Exhibit 23: Accela Inspector on Android**

Inspector requires a Mobile Office license. For more details, visit <http://www.accela.com/civic-apps?id=515>. Inspector for Android can be downloaded at the [Google Play Store](#) and for iOS at the [Apple iTunes Store](#). Anyone can preview the app for free.

#### **4.1.3.4 Engagement Solutions**

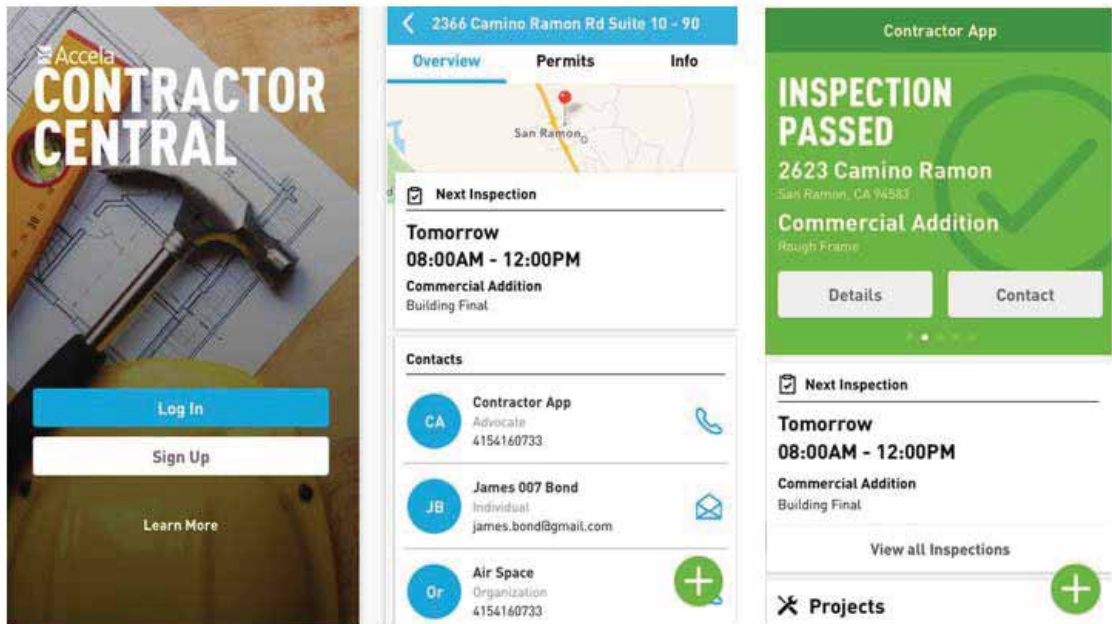
##### **Contractor Central App**

As a free, added benefit to our Land Management solution, the Contractor Central app provides another way for agencies to speed up the inspection



process. Following the same permissions configured for Land Management, this app benefits contractors by allowing them to:

- ➔ Schedule inspections from anywhere, in minutes
- ➔ See instant updates on inspections and projects
- ➔ Focus on the job at hand with quick access to a permit's contacts, professionals, and dues



**Exhibit 24: Contractor Central app**

## Contractor Central

[View More by This Developer](#)

By Accela, Inc.

Open iTunes to buy and download apps.



[View in iTunes](#)

Free

Category: Business  
Released: Aug 25, 2015  
Version: 1.0.0  
Size: 6.7 MB  
Language: English  
Seller: Accela, Inc.  
© Accela, Inc. 2015  
Rated 4+

**Compatibility:** Requires iOS 8.0 or later. Compatible with iPhone, iPad, and iPod touch. This app is optimized for iPhone 5, iPhone 6, and iPhone 6 Plus.

### Customer Ratings

We have not received enough ratings to display an average for the current version of this application.

More iPhone Apps by Accela, Inc.



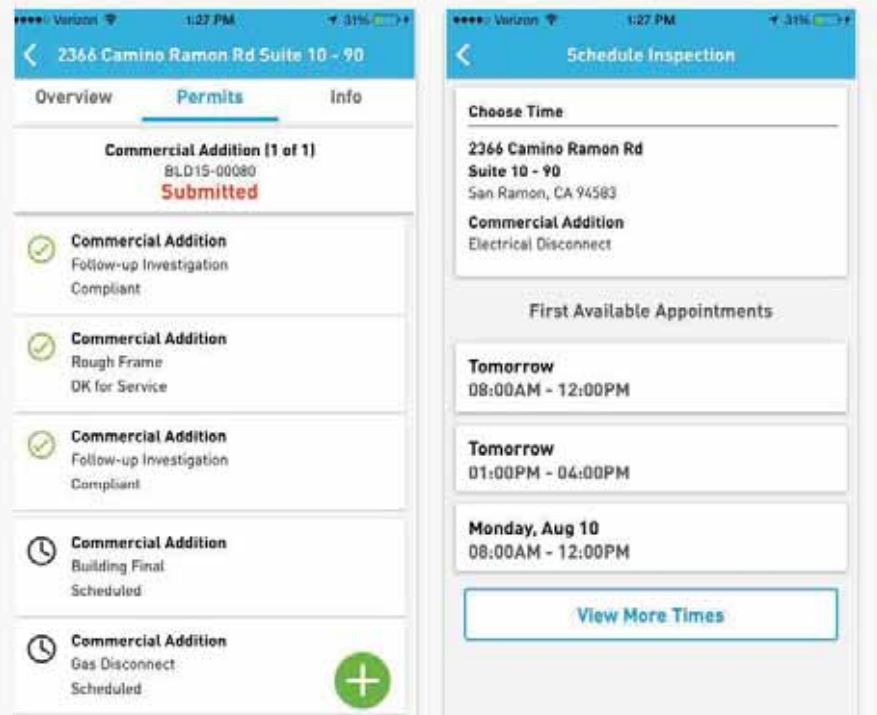
### Description

Accela's new Contractor Central app, available in Fall 2015 to Accela-powered agencies, is an added benefit of the Civic Platform Land Management Solution.

[Accela, Inc. Web Site](#) [Contractor Central Support](#) [Application License Agreement](#)

[More](#)

### iPhone Screenshot



**Exhibit 25: Permits and Schedule Inspection screens on Contractor Central**

Contractor Central requires a Mobile Office license. For more details, visit <http://www.accela.com/civic-apps/contractor-central>. Contractor Central for Android can be downloaded at the Google Play Store and for iOS at the [Apple iTunes Store](#). Anyone can preview the app for free.

All Accela-developed apps support portable printers. On an iPad, the user may print reports using AirPrint printer on the Wi-Fi network, or choose the Brother PocketJet Ad Hoc Wi-Fi Printer option. Android version supports the Brother PocketJet Bluetooth printer.

#### 4.1.4 Citizen Portal

To watch how Palo Alto, CA empowers citizens by moving permitting and inspections online, visit <http://bit.ly/1NcvdWA>.

- Allows customers to estimate the cost of a permit
- Allows customers to save partially completed permits
- Allows for the incorporation of multiple jurisdictions to participate with their own business rules under a prime agency

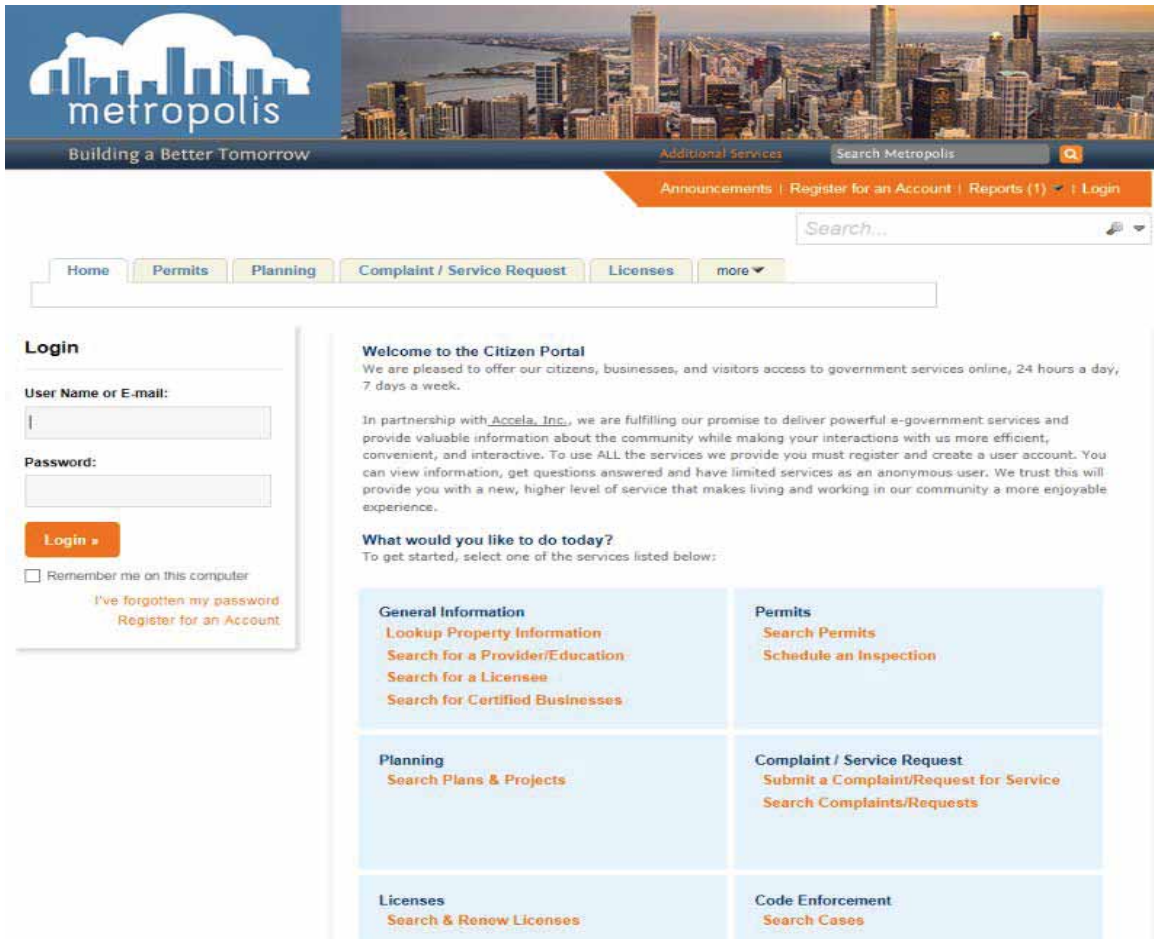
Accela has long been cognizant of the need for transparency and accountability. For the first time, public agencies can provide their applicants with online permitting and inspection scheduling. The web portal also provided the ability to view real-time status of agency projects and applications. Our goal has since been to provide applicants with more information, greater flexibility, and the ability to interact with government 24/7 in diverse languages.

Citizen participation and collaboration is now one of the most urgent needs facing our government. The ability to put processes online greatly assists this mission in two key ways—by allowing applicants to take advantage of self-service and by increasing agency staff productivity. Another obvious advantage is the solution’s inherent ability to address budgetary concerns and help government do “more with less.”

Through a self-service web portal and an open user interface, Citizen Portal extends government services to the public 24-hours a day by providing members of the public with online access to apply for land development applications, permits, licenses, schedule inspections, request services, and perform tasks from the convenience of their home, office or jobsite. This presents a useful way for public users to interact with your agency in an efficient manner.

By configuring a custom welcome page and designing page flows that are intuitive, easy-to-use, and come with agency defined context specific help agencies can better engage and connect with their public. This enables truly transparent government operations. Citizen Portal supports IE 11 and the latest stable versions of Firefox, Safari, Chrome, and Opera browsers.

*(The remainder of this page left intentionally blank)*



The screenshot shows the top of the Citizen Portal. At the top left is the 'metropolis' logo with the tagline 'Building a Better Tomorrow'. To the right is a cityscape image. Below the logo is a navigation bar with 'Additional Services' and a search box. Further right are links for 'Announcements', 'Register for an Account', 'Reports (1)', and 'Login'. Below this is a search bar with the text 'Search...'. A secondary navigation bar contains buttons for 'Home', 'Permits', 'Planning', 'Complaint / Service Request', 'Licenses', and 'more'. On the left side, there is a 'Login' section with fields for 'User Name or E-mail' and 'Password', a 'Login' button, and links for 'Remember me on this computer', 'I've forgotten my password', and 'Register for an Account'. The main content area is titled 'Welcome to the Citizen Portal' and includes a welcome message, a paragraph about the partnership with Accela, Inc., and a section 'What would you like to do today?' with a list of services: 'General Information' (Lookup Property Information, Search for a Provider/Education, Search for a Licensee, Search for Certified Businesses), 'Permits' (Search Permits, Schedule an Inspection), 'Planning' (Search Plans & Projects), 'Complaint / Service Request' (Submit a Complaint/Request for Service, Search Complaints/Requests), 'Licenses' (Search & Renew Licenses), and 'Code Enforcement' (Search Cases).

**Exhibit 26: Citizen Portal Welcome Page**

*(The remainder of this page left intentionally blank)*

Hello, Lizzie

Action Required (3)

[Hide](#)

Due Date	Record Name	Record ID	Action
05/22/2015	Liquor License	15CAP-00000251	<a href="#">Renew</a>
05/25/2015	Liquor License	15CAP-00000253	<a href="#">Renew</a>
05/27/2015	Liquor License	15CAP-00000252	<a href="#">Renew</a>

Saved in Cart (1)	View Cart
<p>15TMP-000426 <small>05/15/2015</small></p>	\$100.00
<b>Cart Total</b>	<b>\$100.00</b>

My Collection (3)	View Collections
<p><b>2</b> records <b>Test3</b> Last Updated 05/15/2015</p>	
<p><b>2</b> records <b>Test2</b> Last Updated 05/15/2015</p>	
<p><b>2</b> records <b>Testing</b> Last Updated 05/11/2015</p>	
<p><b>8</b> records <b>Coll</b> Last Updated 05/10/2015</p>	

Work in Progress	View All Records			
Record Name	Record ID	Module	Creation Date	Action
Licenses/ACA/Lizzie/Child renewal	15TMP-001252	Licenses	5/18/2015 12:00:00 AM	<a href="#">Resume Application</a>
Licenses/ACA/Lizzie/Child renewal	15TMP-001235	Licenses	5/17/2015 12:00:00 AM	<a href="#">Resume Application</a>
Licenses/ACA/Lizzie/Child renewal	15TMP-001216	Licenses	5/12/2015 12:00:00 AM	<a href="#">Resume Application</a>
Licenses/ACA/Lizzie/Child renewal	15TMP-001340	Licenses	5/6/2015 12:00:00 AM	<a href="#">Resume Application</a>
Licenses/ACA/Lizzie/Child renewal	15TMP-001335	Licenses	5/6/2015 12:00:00 AM	<a href="#">Resume Application</a>
Licenses/ACA/Lizzie/Child renewal	15TMP-001129	Licenses	5/6/2015 12:00:00 AM	<a href="#">Resume Application</a>
Licenses/ACA/alice/alice1	15TMP-001304	Licenses	5/5/2015 12:00:00 AM	<a href="#">Resume Application</a>
Licenses/ACA/alice/alice1	15TMP-001059	Licenses	4/20/2015 12:00:00 AM	<a href="#">Resume Application</a>
Licenses/ACA/alice/alice	15TMP-001019	Licenses	4/14/2015 12:00:00 AM	<a href="#">Resume Application</a>
Licenses/ACA/Lizzie/Child renewal	15TMP-001027	Licenses	4/14/2015 12:00:00 AM	<a href="#">Resume Application</a>

Exhibit 27: Citizen Portal Dashboard

[General Information](#)
[Licenses](#)
[Building](#)
[Planning](#)
[Legislative Management](#)
[Home](#)
[more](#)

[Dashboard](#)
[My Records](#)
[My Account](#)
[Advanced Search](#)

---

**Advanced Search Options**

Global Search	Product Search	Search Records/Applications
---------------	----------------	-----------------------------

**Search for Licenses**

Select the search type from the drop-down list and then use the parameters below to search:

- Site Address
- Record Information
- License Information
- Licensed Professional Information
- Trade Name
- Contact Information

[Licenses](#)  
[Building](#)  
[Planning](#)  
[Case Management](#)  
[AMS](#)

---

**General Search**

[Search All Records](#)

Record Number:  Record Type:

Project Name:

Start Date:   End Date:

License Type:  State License Number:

First:  Last:  Name of Business:

Business License #:

---

Street No.:  Direction:

Street Name:  Street Type:

Unit Type:  Unit No.:  Parcel No.:

City:  State:  Zip:

**Exhibit 28: Advanced Search in Citizen Portal**



“Permits Online (Accela Automation) also has created workflow efficiencies that allow TTB to process electronic applications nine days faster than paper applications that the Bureau receives at the same time. Industry members who use Permits Online also save approximately six days on mailing delays from the time they submit their applications to the time they receive their approval documents.”

U.S. Alcohol and Tobacco Tax and Trade Bureau *Annual Report*

Among the many citizen privileges available external users can take advantage of the following capabilities:

- ➔ Apply for permits
- ➔ Research parcels using Esri GIS
- ➔ Submit complaints
- ➔ Submit requests for service
- ➔ Check status of applications, permits, and inspections
- ➔ Upload electronic plans and other documents or photographs
- ➔ View solution generated alerts and notifications
- ➔ View a history of all complaints/requests
- ➔ Conduct searches
- ➔ Pay fees
- ➔ View data on maps
- ➔ Search addresses/parcel information
- ➔ Access government documents
- ➔ View all parcel history

Citizen Portal is available in English (U.S. and Australian), Spanish, French, Arabic, Chinese, Portuguese, and Vietnamese language packs. Additionally, we developed the solution so that all financial transactions are PCI DSS compliant. Furthermore, our solution is Section 508c compliant, to make our products accessible to people with disabilities—such as blindness and low vision.

Purchase of Citizen Portal includes the mobile application, Mobile Citizen Portal, which further enhances accessibility options for public users. **Constituents now enjoy a truly mobile access to government data, using iOS or Android devices.**

Citizen Portal inherits the exact business rules established in Land Management. System administrators simply select which service request activities are to be made available to the public. Additionally, the Civic Platform utilizes one central database—data submitted through Citizen Portal is immediately available for processing by back office users in Land Management.

For a video showing how Baltimore County, MD is automating its code enforcement processes using Citizen Portal, visit <http://bit.ly/1xvV3mP>.



Accela was selected as the recipient of the 2013 Esri Partner Conference Award for Private (Internal) Web Application for Accela Automation, a GIS-infused platform for government. The award is given to the company that demonstrates practical yet innovative solutions with ArcGIS 10.1. Partners were nominated by various Esri staff and distributors.

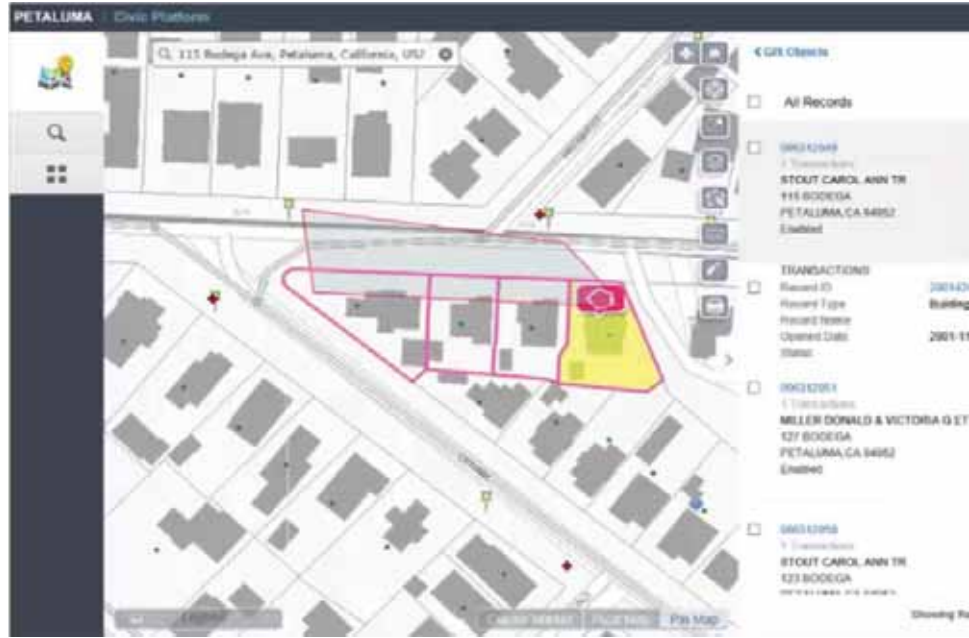
## 4.1.5 GIS

Accela is an Esri Gold Partner and has been an Esri partner for 20 years. This has given Accela access to Esri staff and valuable information for creating tight integration with the GIS industry leading technology. The Civic Platform map component is built using the Esri JavaScript map control and consumes GIS services published from the agency's ArcGIS Server or ArcGIS Online, as well as can consume Open Geospatial Consortium Web Mapping and Web Feature Service map services.

GIS also provides visualization of an agency's government data geographically by plotting locations of activities captured in the Civic Platform on the map. GIS provides enhanced user experience with:

- Optimal server response times
- Smooth panning
- Context sensitive commands and menu items
- Drag and drop functionality
- Client side graphic rendering

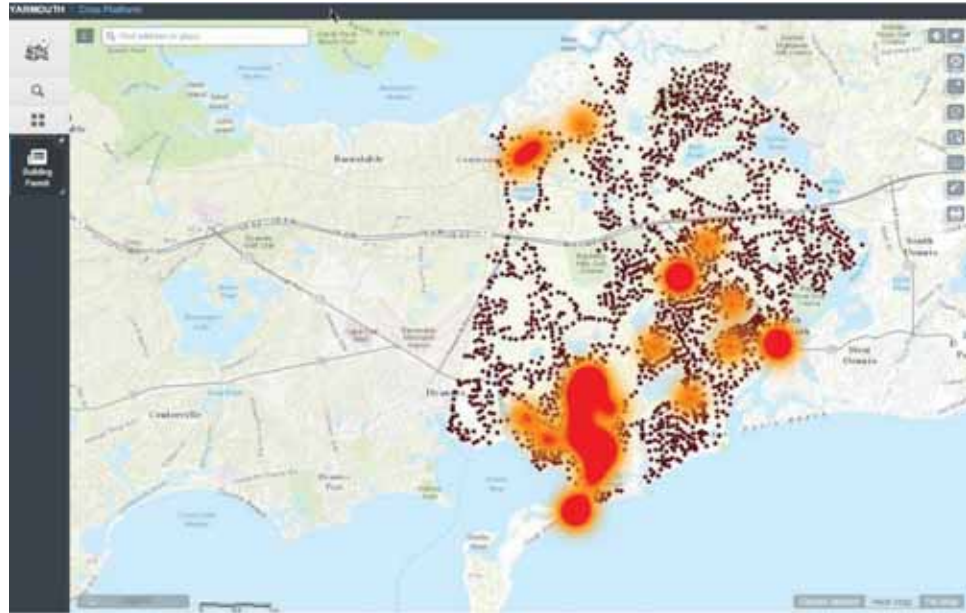
Accela's GIS gives users the option to initiate and manage all land management activities from a map interface. GIS is a bi-directional interface enabling viewing, interaction and presentation of both tabular and spatial information. It leverages an agency's GIS database and map services published by one or more ArcGIS Servers. Base maps published from one agency can be combined with map data from another agency to provide a comprehensive view of geographic information.



**Exhibit 29: Accela GIS bi-directional interface**



**Exhibit 30: Share the Civic Platform data in Esri ArcGIS Online**



**Exhibit 31: GIS Heat Map**

Optional map editing tools empower end users to draw new features using points, lines, or polygons to represent actual geographic elements or assets. Once these new features are created, they can be associated to transactions in the Civic Platform database. GIS supports efficient fieldwork through its routing features. Inspection schedules can be automatically routed or users can choose to optimize inspection schedules based on shortest distance or travel time.

See how our GIS capabilities empower agencies to leverage their GIS investment at <https://vimeo.com/10157970>

Bing Maps are included with Accela’s GIS map viewer. Customers may enhance user views by adding the agency’s ArcGIS map layers to the map viewer. Together, these data sources, united with Accela transaction data, offer the most comprehensive visual representation of government and location data available. Users can manage, edit, and update data from the map viewer. The map viewer presents reference data and context-based action items for a selected parcel(s) (i.e., create record, show record, create inspection, etc.).

When deployed with Mobile, routing capabilities are available whether connected or disconnected from the network. Routes and driving directions can be saved and printed as needed. Optimized routing can be done one of two ways:



**GIS is not just integrated; it provides infused mapping at great speeds and capabilities, including the ability to buffer of any distance around a property and get results in record time.**

- ➔ To use an agency’s street file, that agency needs ArcGIS Server Network Extension and a published routing service. The agency typically creates the network via ArcGIS Desktop and the Network Analyst extension.
- ➔ The agency may not have a quality street file in an Esri GIS format or does not have the additional Esri software list noted in #1 above. Alternatively, an agency may use Bing Maps, which is included in Accela’s GIS solution at no additional cost.

The following is a list of features/functions that are available out of the box in Accela’s GIS solution:

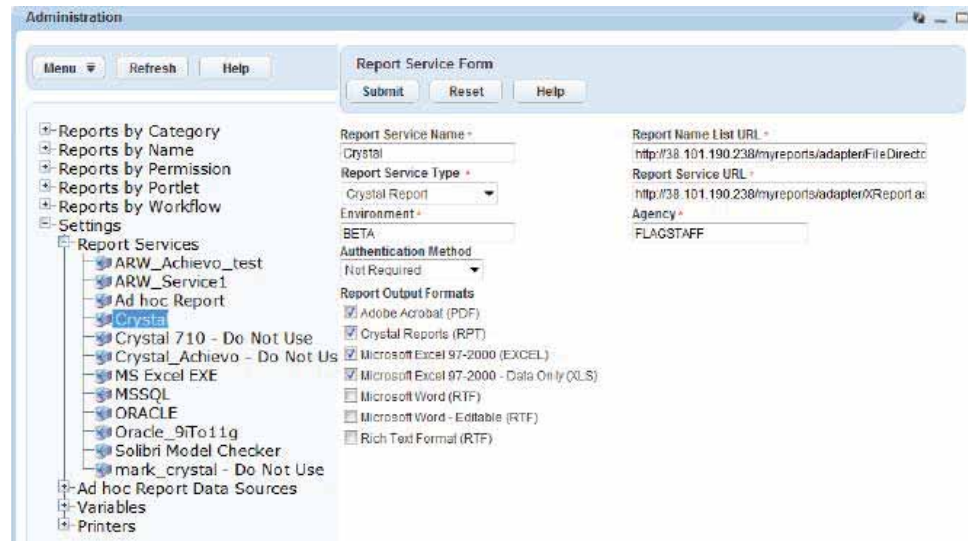
- |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"> <li>➔ Plotting event locations (address, parcel or asset matching)</li> <li>➔ Start new application/transaction from selected map feature</li> <li>➔ Navigation (pan, zoom in/out, zoom to scale/selected/full extent)</li> <li>➔ Select (by line, polygon, rectangle)</li> <li>➔ Buffer selection</li> <li>➔ Attach/associate feature to transaction record</li> <li>➔ Add selected features to a Set in Accela</li> <li>➔ Redlining (point, line, polygon and text box)</li> <li>➔ Identify (click on map and see attributes of features)</li> <li>➔ Reverse geocoding for mobile mapping</li> </ul> | <ul style="list-style-type: none"> <li>➔ Measure (linear and area)</li> <li>➔ Search for address, parcel, asset, and GIS feature</li> <li>➔ Routing &amp; driving directions (either via Network Extension and street centerline or via Bing Maps)</li> <li>➔ GIS editing (create new simple features, modify feature geometry, edit attributes)</li> <li>➔ Mash up multiple map services</li> <li>➔ Proximity alerts (non-visual spatial querying in the workflow process)</li> <li>➔ Dynamic themes (real-time queries displaying results on the map- connectivity dependent)</li> <li>➔ Mobile mapping/offline mapping</li> <li>➔ GPS locator</li> </ul> |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

### 4.1.6 Reporting

Accela understands reporting can be one of the most difficult, time consuming functions – while critical and necessary for measuring, scheduling and determining business decisions. Accela’s Civic Platform includes 100+ standard reports that can be used with our Best Practice Templates. The reports are created

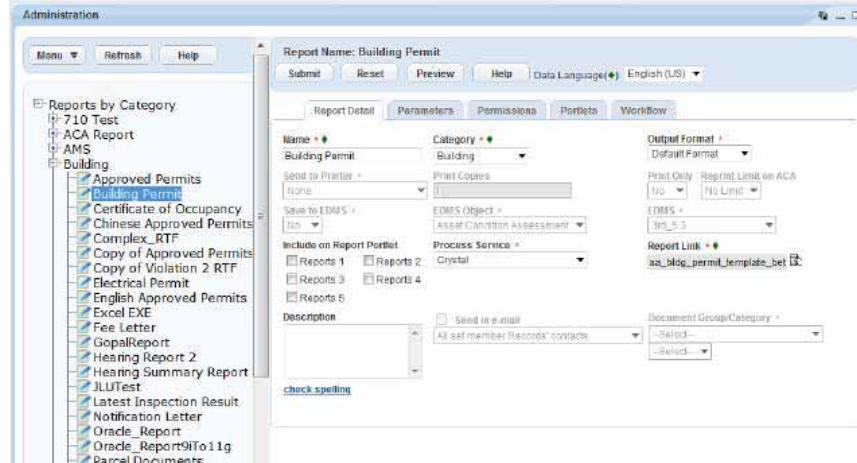
in a fashion that are dynamic and adjust to the data that is being fed to the report/letter.

In addition, the Civic Platform's Report Manager allows agencies to leverage their investment in such third-party reporting tools as Crystal Reports (RAS Edition), MS SQL Server Reports, and Oracle Reports via an adapter. This integration adapter includes basic function such as authentication, HTTP request to retrieve report names, HTTP requests to pass parameters to a BI report engine and to execute the report, and return the report result in predefined formats. Accela's Report Manager is the centralized portal that manages all report related configuration.



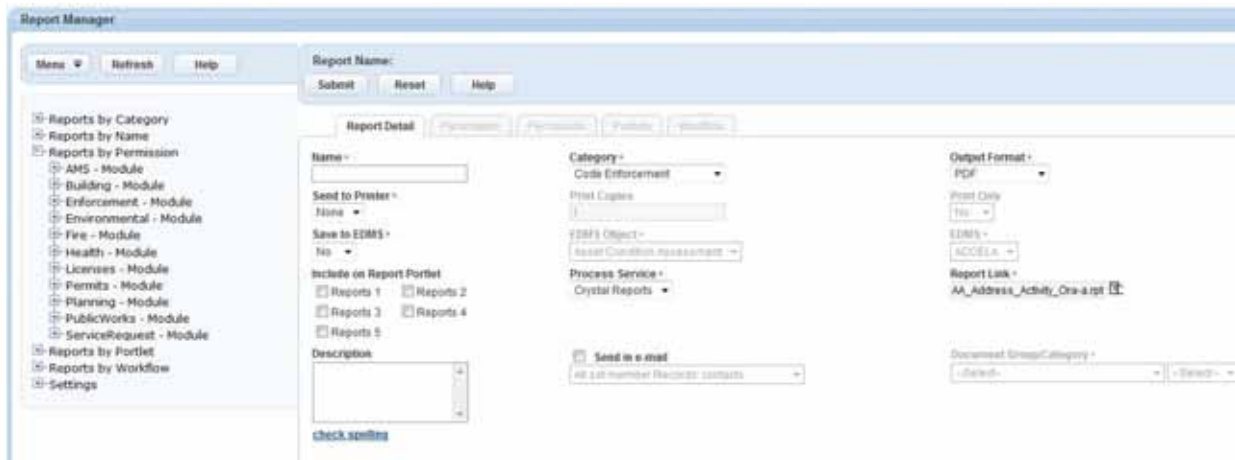
**Exhibit 32: Configuring the default behavior of Crystal Reports in Accela's Civic Platform**

Once the Service Settings have been established individual reports can be linked and assigned to Report screens, printers and set to Save automatically to the EDMS (EDRM) when generated.



**Exhibit 33: Accela's Report Manager settings for an individual report**

The system can provide reports to be generated in multiple formats depending on the need including Hypertext Markup Language (.html), Adobe Acrobat Portable Document Format (.pdf), Microsoft Word (.doc), Rich Text Format (.rtf), delimited text by tab or comma, Microsoft Excel Spreadsheet format (.xls), and XML. Reporting tools provide services to format, spell check and design documents from simple to detailed designs.



**Exhibit 34: The Accela Civic Platform's Report Manager**

Accela's Ad hoc Report Writer provides an easy point-and-click user interface and user-friendly views of the Civic Platform data. Due to its ease of use, report writers do not need specialized report-writing skills or an in-depth knowledge of the Civic Platform data schema. Authorized users have the ability to design, deploy and manage its own dashboards, reports and documents (i.e., form letters)

without requiring any third party reporting tools such as Crystal reports. A basic tabular report can be written in 15 minutes or less.

Reports may be immediately published in the Civic Platform without the assistance of the IT team or administrative staff. Tabular reports automatically provide hyperlinks that allow users to launch and view related Record data in the Civic Platform from within a report. In addition to creating tabular reports, users may also create formatted forms and documents such as contracts, permits, rental agreements, etc. Comprehensive administrative functions are available for these reports, forms, and documents, such as controlling access to creating/running reports, controlling access to data views, managing report menu visibility, automated generation of reports, automated emailing of reports, automated saving of reports to a document management system, etc.

Accela's Ad Hoc report writer empowers novice users to easily create reports and documents in record time with an intuitive interface without specialized database or report writing skills. What would take a trained SSRS or Crystal report writer hours to write can now be accomplished in minutes, by any end user.

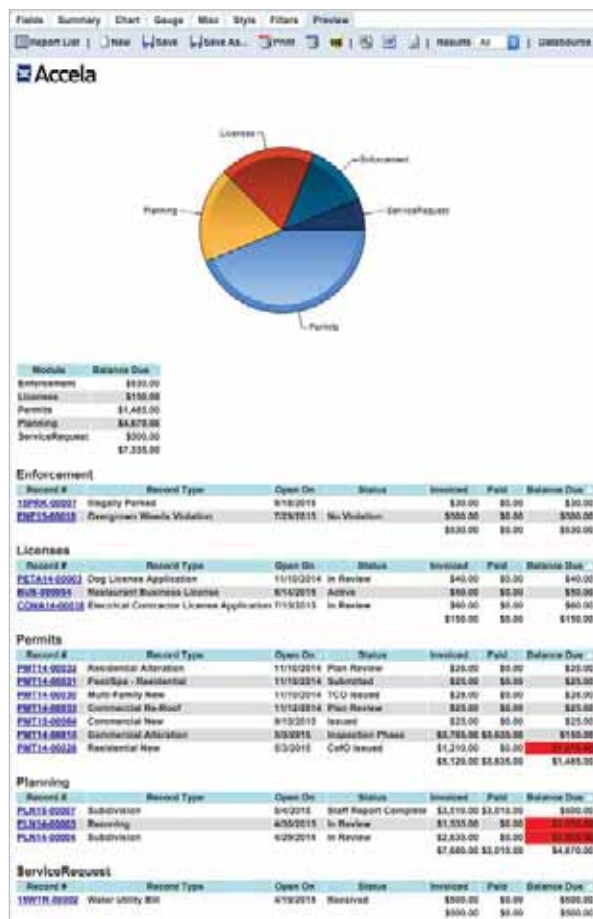


Exhibit 35: Accela's Ad-Hoc Reporting Tool

Users can create, save, organize and maintain an unlimited number of reports from the Report Manager. Report parameters can be established, permissions assigned, and reports can be attached to screens and associated with workflow tasks (for example, "print permit" for a specific record). Report Manager

See how easy it is to create powerful reports at <https://vimeo.com/99651162>



manages the printing of all reports, including permits, documents, statistics, analytics, and form letters. Hard copy permits may be printed manually, as part of a workflow task, or as part of a batch process. Other types of reporting functionality include:

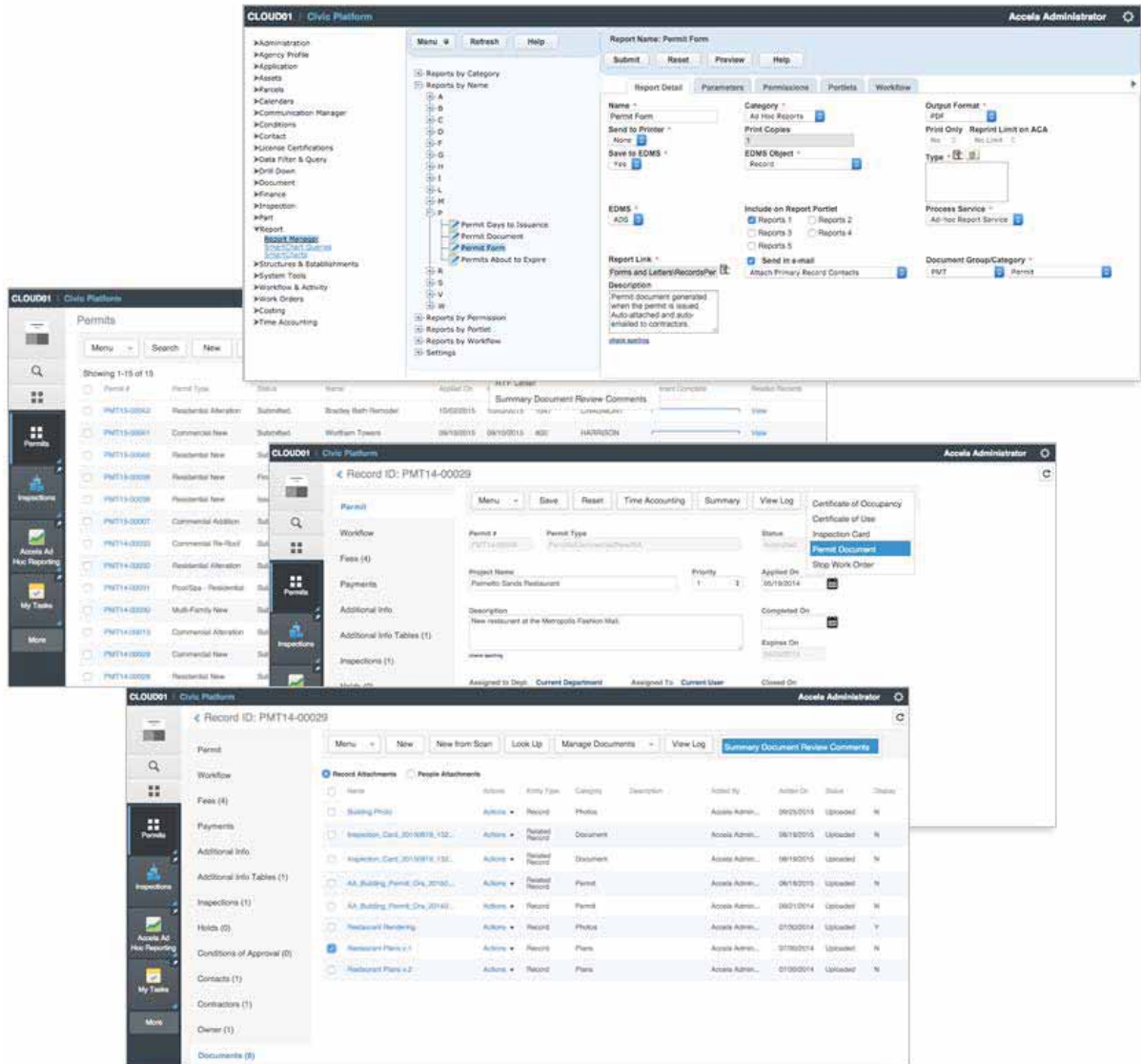
- ➔ **CSV Export** – End users can export the contents of any List screen directly to an Excel™ spreadsheet for reporting and analysis activities.
- ➔ **Filters and Global Searches** – Filters and Global Searches let end users see data they need to see, in the way they want to see it. This allows end users to do their jobs more effectively. Administrators configure role-based Filters, thus allowing end users to see only authorized data. Global Searches are dynamic queries that either administrators or end users can configure and save. For example, a call center agent may set up a Global Search for an Electrical Plan Check due within the next ten days.
- ➔ **SmartCharts** – SmartCharts provide at-a-glance summarized business information so end users can view actionable data and take steps to improve agency operations. SmartCharts provide multiple charting objects (bar, line, gauge, odometer, et cetera) that appear on an end user console to provide key business indicator information. During implementation, Accela Services customizes SmartCharts to display key agency-specific information.
- ➔ **Analytics** – Analytics is a free app that leverages information from an agency’s Civic Platform database and displays trends and activities happening within an agency. The data can be displayed in graphical format allowing users to interact with it and drill into specific records for details. This app provides a number of ways for registered Civic Platform users to easily access the information they need via the Home screen, Watch Lists, Charts and Maps.

To foster sharing of best practices across to all its customers, Accela also provides a site for sharing of ideas, configurations, and suggestions for enhancements, reports and much more in Accela Success Community. This site provides a benefit to our customers to share reports as a library of documents using best practices across the country.

#### **4.1.6.1 Standard Reports**

Since each agency operates in different ways using unique procedures, reporting is largely considered unique output—what is standard to one agency may not be standard to another. Due to their dynamic design, Accela’s Report Manager and ad-hoc report writer can produce an unlimited number of reports regarding permits, inspections, licensing, workloads, audit logs, and staff performance, among others. Reports and other types of electronic documents attached to case records like permits and inspections, for instance, can be viewed in their native formats by authorized end users. Reports can be segmented via security rights to

show available to specific groups. This provides an agency the ability to display a list of reports that are applicable to each user group. For example, financial clerks only see reports that apply to revenue processing, while investigators only see reports relating to enforcement actions. Accela clients can also collaborate and share report templates on Accela’s public community website (<https://accela.force.com/success/CustomerCommunityLogin>).



**Exhibit 36: Examples of Reports deployed within a Record List, Permit Form and Permit Documents List**

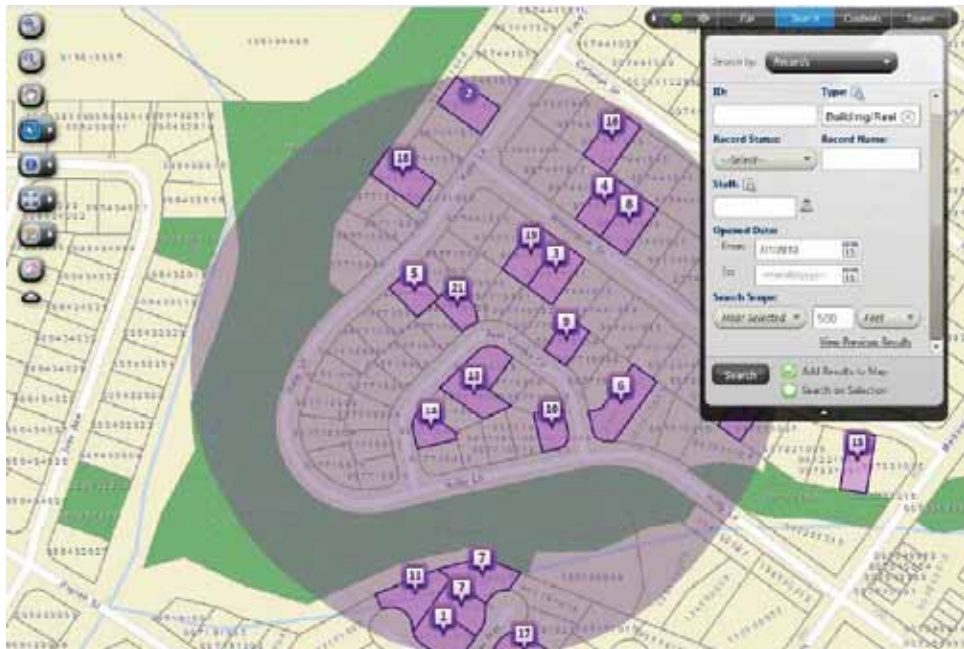
Citizen Portal provides additional time saving features by offering agencies the ability to publish reports to the web for both citizens and registered users. By using third party systems and those reporting tools in the system, the City will

have immense opportunities to present data in a wide variety of formats for personal, administrative or publication purposes.

The following search capabilities augment our reporting functionality:

- Location-intelligent searching allows users to find records that are:
  - Within the map extent (visible geographic area)
  - Within a boundary (polygon)
  - Near a selected feature (asset, parcel, GIS object)

- Soundex Search Support uses phonetic algorithms to account for misspellings, producing better search results when searching for records by

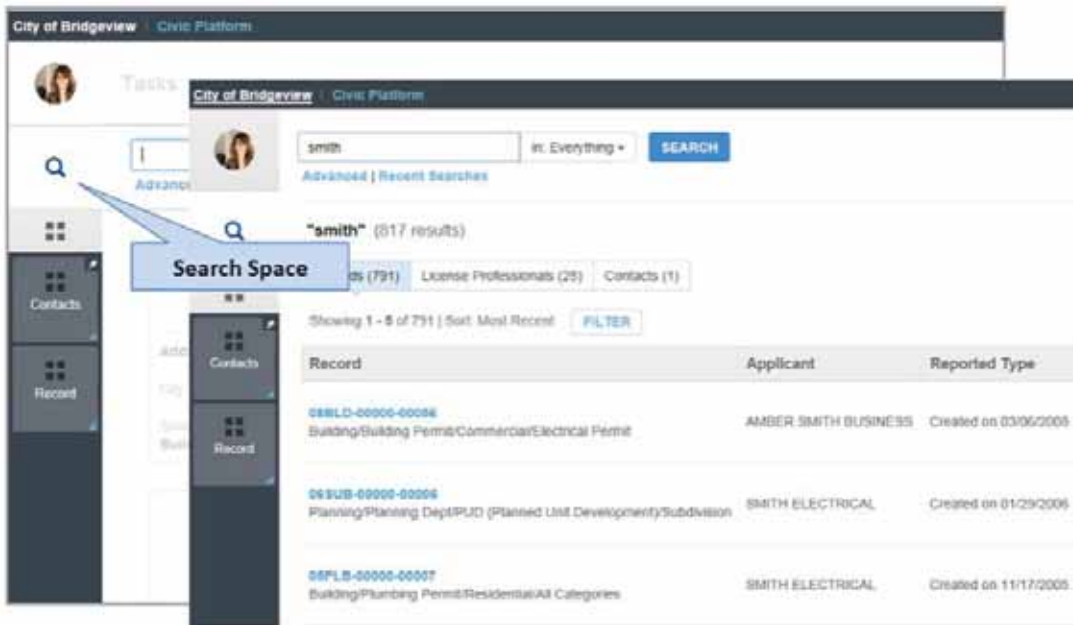


contact name or address

- Search for records with disabled record types
- Application Specific Information (ASI) fields can be used to filter the Record List and My Tasks screen using Data Filters and Global Searches
- Search for records, address, parcel, and owner data by template fields
- Search multiple levels of related records hierarchy
- Search for records using the record Expiration date range.
- Search date ranges for certified businesses
- Search by Doing-Business-As (DBA) as well as company name from Citizen Portal

Only Accela provides agency staff and customers quick and easy access to data across the agency via our powerful global search capability with the industry's only data and document global indexing engine.

➔ Search for documents quickly using Global Search



**Exhibit 37: Global Search: The search space is where you can save searches, see recent searches and run advanced searches**

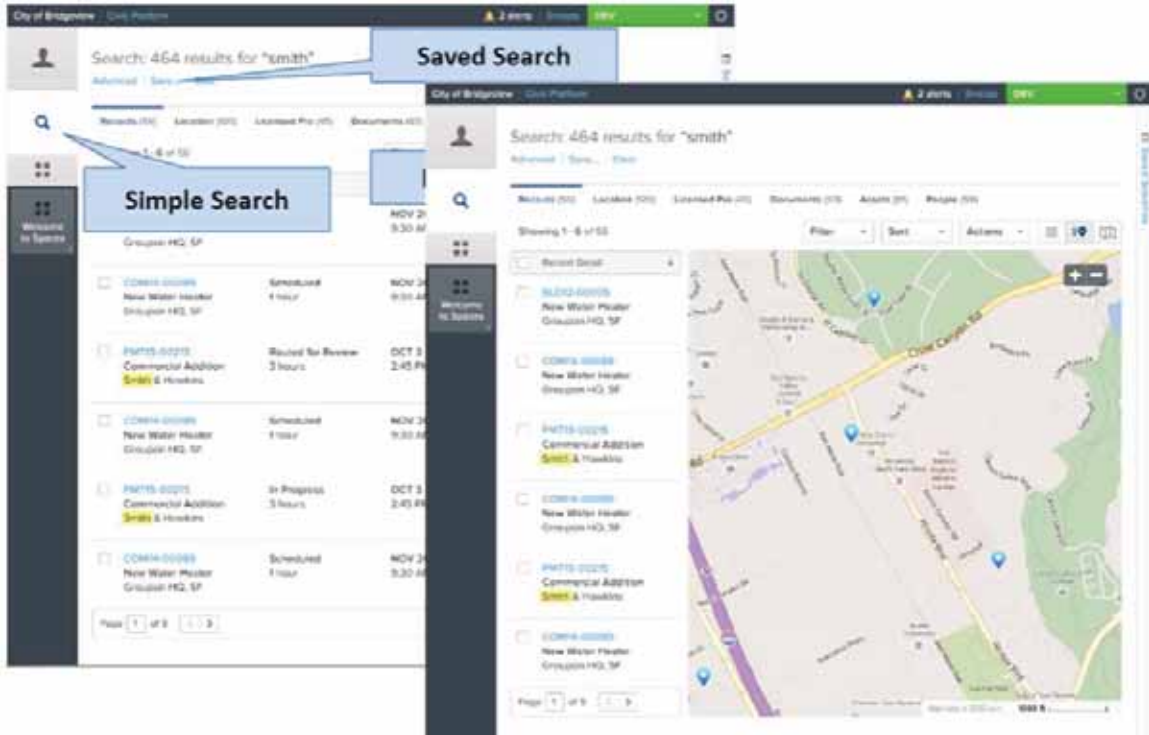


Exhibit 38: Mapping Search Results

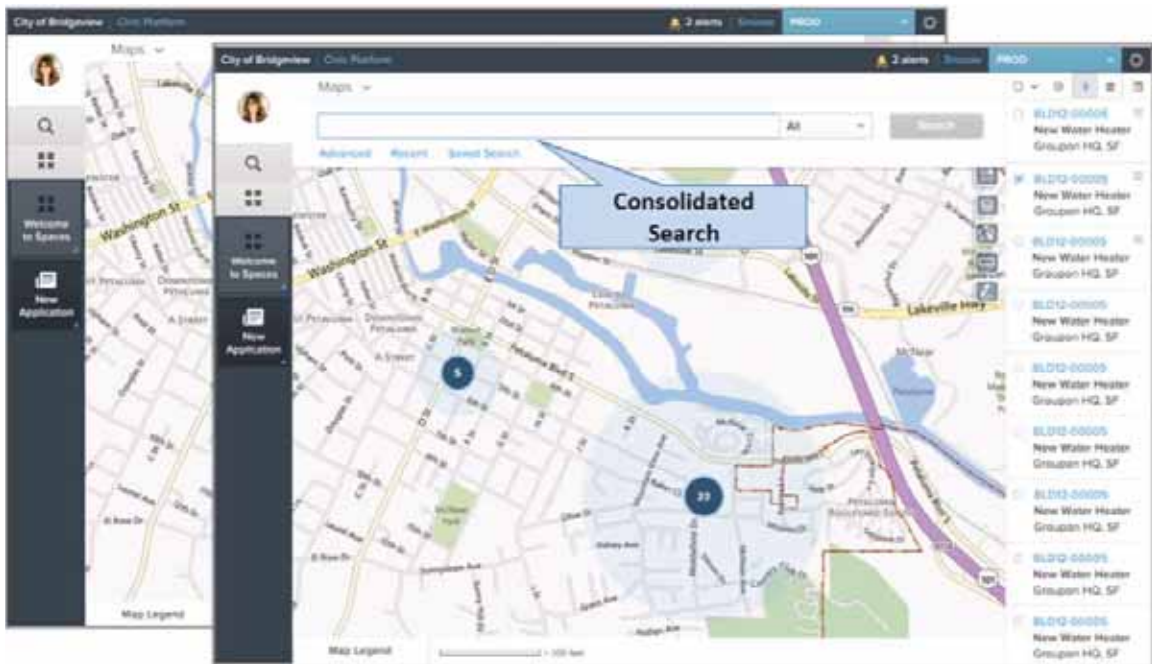


Exhibit 39: Map-Based Global Search

smith

"smith" (817 results)

Records (791) License Professionals (25) Contacts (1)

Showing 1 - 5 of 791 | Sort: Most Recent

Record	Applicant	Reported Type	Location
08BLD-00000-00056 Building/Building Permit/Commercial/Electrical Permit	AMBER SMITH BUSINESS	Created on 03/06/2006	
06SUB-00000-00006 Planning/Planning Dept/PUD (Planned Unit Development)/Subdivision	SMITH ELECTRICAL	Created on 01/29/2006	3200 N FOURTH ST, SUP
05PLB-00000-00007 Building/Plumbing Permit/Residential/All Categories	SMITH ELECTRICAL	Created on 11/17/2005	3200 N FOURTH ST, SUP
05SUB-00000-00029 Planning/Planning Dept/PUD (Planned Unit Development)/Subdivision	SMITH ELECTRICAL	Created on 11/10/2005	3200 N FOURTH ST, SUP
05SDP-00000-00007 Planning/Site Plans/SPD - Site Plan Development/N/A	SMITH ELECTRICAL	Created on 11/10/2005	3200 N FOURTH ST, SUP

Page 1 of 159

**Exhibit 40: Search**

- ➔ Search Contact records or records by Business Name/Organization name
- ➔ Search Contact records by Business Name using Global Search
- ➔ Search for Records by Record and Contact Activity data
- ➔ Use the new Inspection Type value picker or Inspection Status drop-down list to locate inspections

#### 4.1.6.2 Custom Reports

Custom reports are created as part of every Civic Platform implementation, as these documents not only comprise what are normal “reports”, but also include other system outputs such as citations, permits, licenses, letters, etc. The Accela team will work with the City’s project team in identifying the needed reports that will be developed using third party reporting systems and also jointly determine if these reports should be developed by Accela, the City or both.

#### 4.1.7 Workflow Designer

A workflow is set of tasks an agency defines and follows to process a permit application or other case type. Workflow functions are more than a simple

Accela’s Workflow Designer is the industry’s most robust rules engine, fully supporting branching and loop backs with ease. Full integration means zero duplicate entry by users.

“checklist” but behave as an integrated tool to track, monitor and activate the processing of an application. Each application can have a unique workflow process; therefore, an agency’s system has multiple to-do lists, at least one for each application type. Workflows provide an efficient way to keep track of these lists and to help users complete their tasks on time. By regularly reviewing an application’s workflow, users can stay current with their workload. To ensure that a task is completed, someone must be assigned as the Task Owner and have responsibility for that task.

Task Management is an inherent component of the workflow element in Automation. We developed one of the first workflow engines in the land management marketplace allowing its governmental clients to determine and configure what tasks or activities would comprise the necessary steps to process a permit, license, complaint, or other configured process from initiation until final completion or resolution. **The Workflow Designer revolutionized the industry since it is the primary driver to task management and to how many other automated features are engaged to control who needs to do what and when.**

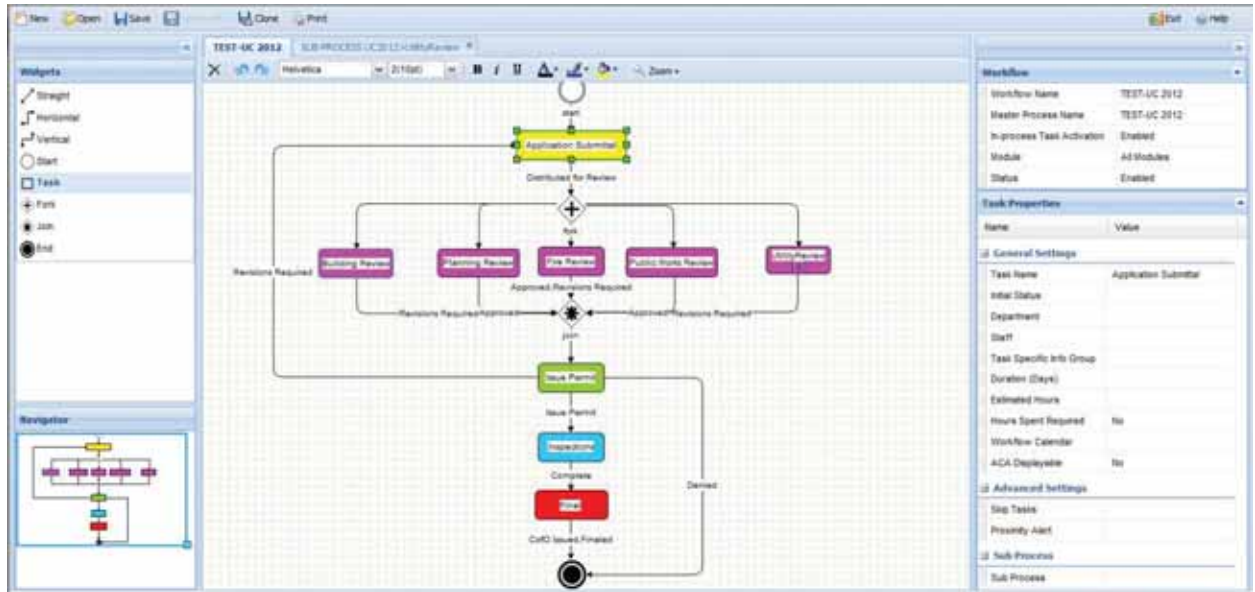
Automation’s Workflow Designer has the ability to mimic any agency’s simple or complex workflow, and allows every aspect of each key business process to be configured in Automation. This tool efficiently guides each process from task to task, from initialization to completion, but it also:

- ➔ Facilitates key task assignments
- ➔ Allows the definition of duration for each of the tasks
- ➔ Automatically sets due dates based on task durations
- ➔ Task tracking: who is assigned to handle the task, task status, location of pertinent data about the completion of the task.

This workflow engine is the most universal element in the Accela client space, acting as the eyes and ears to a myriad of public processes in city, county and state governments. Accela’s Workflow Designer has expanded this graphic design tool for workflow configuration to include the following major features:

- ➔ **Support administrators to drag and drop widgets onto the canvas to visually build or edit a workflow process.** The widgets may be process start and end points, forks, joins, flow lines, and tasks (including sub process).
- ➔ **Support administrators to design workflow and processes,** and define tasks in processes, including setting task basics, associating task specific-information group, setting task status, proximity alert, and e-mail notification.

- ➔ **Automatically synchronize** with the workflow settings in Accela’s Automation Classic and the existing workflow administration functions in Automation Vantage360.



**Exhibit 41: Workflow Designer**

The key components of the Workflow Designer feature include:

- ➔ **Workflow Tasks:** Each workflow process consists of a series of logically ordered, user-defined tasks that comprise a specific business process. The Workflow Designer allows these tasks to be handled one at a time or concurrently. It can change based on each task’s status, for example, skipping certain tasks as appropriate, branching and/or looping to other tasks as needed, or repeating tasks when necessary.
- ➔ **Task Statuses:** Each task may have a series of Task Statuses that update and direct the task within the Workflow Designer process. These statuses are user-defined and control the various paths the workflow process takes using flow controls. However, because a task is just one component of an application, the task status may be different from its application’s status. For example, if there are six tasks required for one application, all six tasks need to be completed before the application status can be “complete.” Therefore, it is possible to have the status of one task be “complete” while the application status is still “in process”.
- ➔ **Application Status:** Task Statuses can drive an overall application status; providing a high-level view of the progress of the workflow process. This is



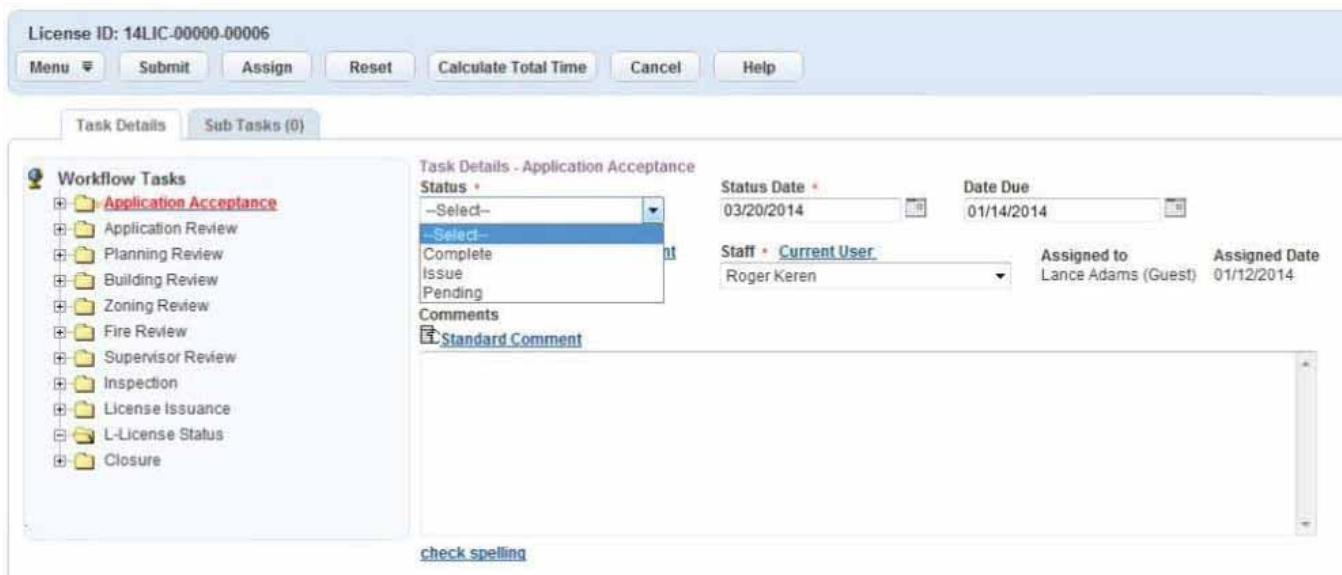
particularly useful in managing process timelines and high-level management reporting.

- ➔ **Task Specific Information:** Task Specific Information is key data entered during the Workflow Task update process. This component also drives task specific checklists that are often critical components of workflows. Task Specific Information fields can be marked as searchable for easy searches.

Workflow Designer is a powerful feature that is integrated with an agency's organization structure. This lets administrators assign each task to an individual that works for the agency. Administrators can also add sub-tasks, also known as activities, to each task. Sub-tasks can help create a more detailed workflow process or outline the steps involved in each main level task. Administrators can also associate any type of document with a sub-task. Documents can give further instructions about a sub-task or record the results of the sub-task. For example, users can attach a report of the results of the plan review or upload the actual plans. A workflow process represents all of the tasks that an agency is responsible for in relation to a certain application type. Users can determine the view, assignment, and search settings for workflow tasks for the My Tasks user screen.

For each task in a workflow process, users can set up a series of appropriate and user-defined task statuses, such as "Active," "In Progress," or "Complete." Task statuses allow users to accurately describe the current situation of a workflow task. As users update workflow tasks, Automation knows which tasks to activate next, depending on how users set up the statuses. In this way, the process moves forward or where needed following user input. When users update a certain task, Accela Automation will update the task in the workflow for the record. However, because a task is just one component of an application, the task status may be different from its application's status. For example, if there are six tasks required for one application, all six tasks need to be completed before the application status can be "complete." Therefore, it is possible to have the status of one task be "complete" while the application status is still "in process".

Every step in the Workflow Process is recorded in Workflow History so that any user with assigned rights can view the history and assess the progression of the Workflow for any given work order. Task assignments and due dates are automatically viewed through Automation's My Task feature. Individual users can view their specific assignments and due dates through a Task portal; and supervisors can view assignments and due dates across the entire department.



**Exhibit 42: Workflows provide clear processing status transparency between back office and self-service.**

## 4.1.8 Accela Cloud

Whether by a perpetual or subscription license, agencies can significantly reduce their infrastructure costs by choosing to host their system in the Accela Cloud, which provides 99.9 percent uptime and full disaster recovery over a standard internet connection. This means agency IT staff can focus on things other than maintaining new hardware and software. Because the Accela Cloud is elastic and scalable, Accela is able to easily expand capacity as demand spikes occur. In addition, the Accela Cloud has full integration capabilities with Esri, Selectron, and other third-party applications that will allow the City to offer a fully functional web-based, cost efficient solution on a 24/7/365 basis while still owning the data that can be exported quarterly to our Cloud customers (at the customer’s request).

For the City’s cloud solution, Accela will leverage its long history of providing cloud solutions for governmental clients. The proposed primary cloud data center is [Equinix](#)—an industry leader for managing complex, mission critical solutions. Our cloud facility located in San Jose, CA is 24/7/365 and **has several certifications including SSAE 16, ISO, and LEED. Over 90% of all Internet routes pass through Equinix data centers.** As outlined below, Equinix’s care and datacenter design provide unparalleled reliability and protection for the Accela Cloud solution:



- Accela Cloud Advantages
- Quick deployment
- Test drive
- Strength of experience
- Disaster recovery
- Secure
- No loss of data ownership
- Scales to annual needs
- Price structure more advantageous for larger agencies

- ➔ 99.9% SLA for Accela’s Civic Platform
- ➔ Thousands of vulnerabilities tested monthly by independent vendor
- ➔ HP WebInspect part of development process
- ➔ Veteran staff with multiple industry certifications (Oracle, Microsoft, VMWare, Java)
- ➔ 25,000+ monthly man hours of development
- ➔ Zero successful security attacks over history

Deployment Options	 <b>On Premise</b>	 <b>Accela Cloud</b>
	(Delivered By)	(Delivered By)
<b>Accela Automation Application Admin</b>	Agency	Agency
<b>Physical data center</b>	Agency	Accela
<b>Disaster recovery facility</b>	Agency	Accela
<b>Hardware</b>	Agency	Accela
<b>Software</b>	Agency	Accela
<b>Upgrades</b>	Agency	Accela
<b>Staff</b>	Agency	Accela

**Exhibit 43: On-Premise versus Accela Cloud**

**In 2014, Accela solutions processed 6,515,531 permits and licenses in the Accela Cloud.**

Benefits of our Cloud solution include:

- ➔ A reliable and cost effective solution for mission-critical business needs handled in the Civic Platform.
- ➔ Load-balanced web servers to handle the needs of all users
- ➔ Multiple middle tier application servers
- ➔ Two node Oracle Real Application Cluster database
- ➔ No single points of failure in any hardware device from the external firewalls through the backend database.
- ➔ Redundant database backups (database is backed up five times daily)
- ➔ Redundant archive log storage
- ➔ Synchronized disaster recover site in the event of a site wide outage

100+ clients of varying size use the Cloud model supporting over 6,000 agency end users and 691,200 public users.

#### 4.1.8.1 Deployment Model

Our Accela hosted environment contains a staging, support, and production environment. There is a two-week testing window for each environment when a new version is applied. This allows clients a chance to preview and validate new features prior to its push into production. Accela follows an annual cycle between major releases with hot fixes and patches provided as needed in the interim. There is also a configuration or support environment available to Accela Cloud clients where new configurations can be created and tested.

Each release of the Accela software follows an internal development and QA process prior to making the new version generally available to customers. The City is responsible for any configuration or changes needed as well as testing each release prior to applying the update to a production environment.

Accela Cloud customer sites are updated in one-week intervals to allow customers adequate time for testing and research prior to the version being applied to the production environment. This allows for a two-week test interval before any release is added to the Production environment.

- ➔ Week 1 – Hosted Test Environment Upgraded
- ➔ Week 2 – Hosted Support Environment Upgraded
- ➔ Week 3 – Hosted Production Environment Upgraded

#### 4.1.8.2 Impact to the City's Network and Bandwidth

As a Cloud model, the impact to the City's network will likely be negligible as the traffic is web oriented.

#### 4.1.8.3 Partners involved in Service Delivery

Other than using the offsite cloud facility, Accela does not require any partners to provide cloud services to the City.

#### 4.1.8.4 Accela Cloud Service Level Agreement

Briefly, the overall service level package under this option is as follows:

- ➔ Identical services and products as City-hosted option
- ➔ Accela and City cloud contract – not a third party cloud provider
- ➔ Hosted at a physically-secure and redundant data center
- ➔ Dedicated Accela cloud staff

- ➔ System administration and support duties for the application and the system database
- ➔ Provisioning of 99.9% application uptime each calendar month, excluding the events described in our attached hosting agreement
- ➔ Advanced notice of planned maintenance (performed late/early morning during off-business hours)
- ➔ Exclusive data ownership by the City

#### **4.1.8.5 Accela Cloud Support Model**

Under Accela Cloud projects, Accela provides a wide variety of services and products as part of its service level agreements. These services are rendered as part of our standard Services Agreement executed yearly.

- ➔ Included as part of our standard maintenance and support, the City will have up to four scheduled after hours incidents. Accela's standard hours of operation for our Customer Support are 4:00 a.m. to 6:00 p.m. PST. Included with our standard maintenance agreements are response time guarantees based on our Customer Support team applying a Low, Medium, or High severity level.
- ➔ In a City-hosted environment, following the recommended hardware and software configurations, the City should expect the same application response time as they should from the Accela Cloud environment. If properly configured, the system should perform in a timely fashion without any latency issues. Also, following the recommended hardware and software configurations, and excluding the events described in our attached hosting agreement, Accela warrants that the Cloud environment will be generally available no less than 99.9% of each calendar month.
- ➔ Customer Support is the key client contact for all post-implementation services provided. Customer Support has responsibility for all client related service calls and inquiries and a staff of 25 experienced personnel trained in all aspects of customer support is available during normal business hours. Customers can also use other online channels such as the Accela Success Community to peruse responses to previously asked questions and to exchange information with the entire community of Civic Platform users nationwide.
- ➔ Standard warranties are offered as part of Accela's support and maintenance services and all services are provided in a professional and workmanlike manner consistent with the practices and standards of care generally accepted within Accela's industry.
- ➔ Version upgrades and other point releases are offered to all customers allowing each customer to decide what portions of these upgrades and

releases they desire to incorporate into their configured systems. Documentation supporting each version release or point release is also provided. All upgrades are designed to not affect any configuration accomplished by any client on the Accela Civic Platform.

Each Civic Platform site operates successfully within the local network environment provided by our clients and at acceptable performance levels to facilitate the transaction of business by each of our clients and their constituents. As a fully web-based system, Automation is available 24/7 and our agency-hosted clients use their own departmental or enterprise IT department staff to support the application after receiving specific training during the implementation process by Accela.

### 4.1.8.6 Accela's Cloud Data Center and Storage Facilities

#### Locations

Accela's primary cloud facility is located in San Jose, California, and operated by Equinix. **Over 90% of all Internet routes pass through Equinix data centers.**

#### Staffing

All staff at the primary cloud facility are employees of Equinix that maintain the IBX's primary features including security, power, cooling, and other facility work. Accela staff maintains the systems remotely using private VPNs and/or dedicated lines.

#### Physical Security

All Equinix facilities are outfitted with biometric palm scanners and require face- to-face verification with security personnel prior to entry. All personnel must present government issued identification and be on a preauthorized access list prior to gaining entry. All equipment is kept inside a biometrically secured private cage with onsite security personnel monitoring the cloud facilities 24/7 via indoor and outdoor video surveillance. Accela's private cage includes a dedicated video camera monitored by security personnel. *Equinix's security and privacy policies are available at [http://www.equinix.com/en\\_US/solutions/by-services/colocation/standards-and-compliance/iso-certified-data-centers/](http://www.equinix.com/en_US/solutions/by-services/colocation/standards-and-compliance/iso-certified-data-centers/).*



- Multilevel user tracking
- Detailed video tracking and archival
- Access by authorized ticket only
- 5 layers of security prior to cage
- Biometric hand scanners with pin codes
- Two-factor remote authentication
- 4 Accela employees have access to cage

## Environmental Controls

### *Cooling Features*



- ➔ Robust, N+1, HVAC provides stable airflow, temperature, and humidity
- ➔ N+2 redundancy for chillers
- ➔ 6 750 ton centrifugal chillers
- ➔ 6 cooling towers
- ➔ Variable frequency drives
- ➔ Chilled water pumps
- ➔ Condenser pumps
- ➔ CRAC air-handling units in the colocation area
- ➔ Cold aisle containment

### ***Flood Control Features***

- ➔ Built above sea level
- ➔ No basement
- ➔ Moisture barriers on external walls
- ➔ Dedicated pump rooms
- ➔ Moisture detection sensors

### ***Earthquake and Fire Features***

- ➔ Exceeds local building codes
- ➔ Can withstand 9.5 magnitude (only 1 recorded in modern history in Chile, 1960)
- ➔ Multi-zoned, dry-pipe, double-interlock, pre-action fire suppression system
- ➔ Very Early Smoke Detection and Alarm (VESDA)

### ***Power Features***



Equinix has some of the world's foremost experts on power management engineering their data centers. Equinix engineers have designed International Business Exchange™ (IBX®) power systems with built-in redundancy, full Uninterruptible Power Supply (UPS) systems with N+1 redundancy levels or greater, and backup generator systems in the event of a local utility failure. Accela currently uses redundant circuits to power every PDU and system within the cloud facility.

#### **Power Always Flowing**

- **Enhanced Workflow Designer**
- **Power feeds from multiple sites**
- **Multiple 2MW Diesel generators**
- **Dedicated fuel contracts**
- **48 hours of fuel on-hand to power site at full capacity**
- **>99.999% uptime**

#### **4.1.8.7 Data Retention and Backups**

At a minimum, Accela keeps two weeks' worth of backups available via the RMAN process for the Oracle database. Where possible, Accela strives to maintain longer backups of data up to one month. Database backups occur nightly and the backups are stored in two separate geographically distinct. All production databases run in archivelog mode and all archive logs are backed up nightly. Traffic between the datacenters is via an encrypted VPN tunnel.

*Encryption is not part of the backup process as no removable media is generated.*



Primary backups are stored on-site on disk. Backups are not stored with any other vendor.

### Disaster Recovery Capabilities

Disaster recovery is an integral part of maintaining business continuity should a catastrophic outage occur. Accela is committed to giving its Cloud customers access to their respective data and sites in a timely fashion should such an unlikely outage occur.

- Second datacenter in Salt Lake City, Utah
- Oracle DataGuard
- Oracle Streams
- Replication Technology
- 15 minute health checks
- Annual data switchover testing

The hosted production database is mirrored using Oracle DataGuard to a geographically distinct failover site in Utah. Great care, planning, and expense has been taken to ensure that no single points of failure occur within the cloud environment itself. All network and I/O paths are redundant and all services are available via load-balanced environments. Accela employs virtualization via VMWare vSphere that allows for dynamic migration of any failed virtual guests to a live physical host the moment an outage is detected. This ensures continuity of business services should a single physical server go offline. Additionally, load-balanced pool members are isolated to different physical hosts further ensuring that a virtual service remains available even if a single pool member goes offline.

A two-node Oracle Real Application cluster provides high availability for the key production Oracle databases. This cluster allows for both dynamic and manual relocation of key services insomuch that the associated web and business services can always connect to a live node. The cluster itself consists of physical servers that also use multipath I/O and aggregated NICs to ensure high availability

Database backups follow a standard weekly full/nightly incremental schedule using Oracle's Backup and Recovery Manager (RMAN).

In any scenario involving data loss, there are multiple paths that can be followed to recover the data. The first involves using Oracle's flashback technology at either the query or table level. The second involves using the logical export to restore the data to a new database to export it. The third involves using RMAN to perform a point-in-time recovery of the data files and archive logs to an isolated cloned instance. The fourth involves using RMAN to perform a point-in-time recovery of the database proper (this being the most drastic).

If a site-wide outage occurs that is projected to be sustained and lasting but the data itself within the datacenter is retrievable, Accela employees will transfer any outstanding archive logs to the physical standby site and activate the standby site as the primary cloud facility. External DNS entries will then be updated to reflect the failover site.

## Database Management Protocols

Database management occurs via Oracle tools such as Oracle's Enterprise Manager, SQL Developer, and SQLPlus. End user connections to the database are unique to a given system. For example, a business/application server with the hostname of BIZ1 that connects to the database server using JDBC will connect with an Oracle username similar to BIZ1 or BIZUSER1. A second application server with the hostname of BIZ2 would connect as an Oracle user named BIZ2 or BIZUSER2. In this way, each server is given credentials and privileges concomitant with its role. Reporting applications are provided read-only privileges by default.

Named database user accounts also exist to identify users such as database administrators, report developers, and conversion team members. Password complexity is enforced.

Database patches occur on an as-needed basis once said patches have been properly vetted to not cause potential disruptions with the database. Accela does not automatically migrate to the latest version of a given database or patch once it is issued as this is not an industry best practice.

At the Oracle level, parameter settings are defined at instance creation and only modified if a real and established need presents itself to which parameter modification would yield a significant measurable result.

Since Accela mirrors its primary database with a physical standby database using Oracle DataGuard, scripts run every 15 minutes that alert on the status of the mirror including its current synchronization level. In this way, the physical standby site is assured to be available in case of an actual disaster.

## 4.2 Functional Matrix

*4.2 - Provide a written response to each module/item identified in Section 3, using the format in Appendix C. The level of detail must be sufficient to allow the evaluators to understand your product's features, functions, and capabilities. Proposers are allowed to supplement their response to Section 3 using additional product information as an attachment to their proposal. However, at a minimum, Proposers must provide a written summary response at the module level such that the evaluators can obtain an adequate understanding to score a response. The response must identify any features described that are not included in the most current release level including the expected release date. If the Proposer is selected to provide a product demonstration, the current application release level in production must be used - piloted or beta tested application versions are not acceptable.*

Please find our completed Response Requirements Template in the following pages.

*(The remainder of this page left intentionally blank)*

**Exhibit 44: Response Requirements Table**

RFP Requirement Number	Requirement
3.1	<b>General System Characteristics</b>
	<p>Permit Lifecycle Management</p> <ul style="list-style-type: none"> <li>• System management from pre-submittal through multi-department and external agency processing, plan checking, conditions, rejections, resubmission, notes, fee calculation and ability to attach documents</li> <li>• Simple indexed search functionality for any keyword</li> <li>• Provide a simple and unified solution to create, track and view all submitted documents, corrections, permits, conditions, fees, inspections, resolutions, and ordinances associated with a permit</li> <li>• Manage and track permit expirations</li> <li>• Scalable system that allows for additional modules and functions to be added over time</li> </ul>
	<p><i>The Accela Civic Platform is a web-based and web-accessed solution that has its roots in over 30 years of land management solution history by Accela. Hundreds of agencies nationwide, at City and County as well as State level, are employing this enterprise solution and its components to transact all manner of permits from their initiation to their completion. All bullets contained in this requirement are inherent to the Civic Platform and have existed for at least 10 years.</i></p>
	<p>Robust Plan Check tracking capabilities throughout all modules</p> <ul style="list-style-type: none"> <li>• Ability to track date received, routed, due date for review for internal and outside reviewers and provide real-time status reporting for individual and overall permit process plan check timeframes</li> <li>• Ability to track dates including application received, all plan review steps, public noticing, public hearings, California Environmental Quality Act (CEQA), etc.</li> <li>• Automated document tracking processes – e.g. barcoding for all permit documents submitted or generated for a project</li> </ul>
	<p><i>Plan Check capabilities are afforded by the Accela Electronic Plan Review component. Accela Electronic Document Review (EDR) is designed to enable review staff to incorporate document review and markup directly into the existing Civic Platform processes that automate, organize, and track reviews. This adds end-to-end management of electronic documents assuring adherence to agency policies and codes. Electronic Document Review is a fully integrated feature within the Civic Platform that leverages different technologies to the agency’s choice, enabling users to review regulatory documents faster and easier. The solution also provides bar coding capabilities. Bar Code readers can be used as an input device in the same fashion as your keyboard and mouse. Data scanned by the bar code reader will populate the currently active field. Some bar</i></p>

RFP Requirement Number	Requirement														
3.1	<b>General System Characteristics</b>														
	<i>code readers have ability to do additional actions. For example, the reader can be programmed to tab after a successful bar code read. This will help the system move the active field to the next field in tab order, saving the user keystrokes.</i>														
	Customer Access – Web Portal <ul style="list-style-type: none"> <li>• Online self-service to view status of planning and permit applications, request inspections, view inspection results, report code violations, and make payments</li> <li>• Ability for customers to electronically submit applications and plans for permits</li> </ul>														
	<p><i>The online portal of the Civic Platform (Citizen Portal) is currently available to over 150 citizens of the US through their local communities. Among the many citizen privileges available external users can take advantage of the following capabilities:</i></p> <table border="1" data-bbox="409 755 1902 1182"> <tbody> <tr> <td>• <i>Apply for permits</i></td> <td>• <i>Research parcels using Esri GIS</i></td> </tr> <tr> <td>• <i>Submit complaints</i></td> <td>• <i>View a history of all complaints/requests</i></td> </tr> <tr> <td>• <i>Submit requests for service</i></td> <td>• <i>View solution generated alerts and notifications</i></td> </tr> <tr> <td>• <i>View data on maps</i></td> <td>• <i>View all parcel history</i></td> </tr> <tr> <td>• <i>Conduct searches</i></td> <td>• <i>Search addresses/parcel information</i></td> </tr> <tr> <td>• <i>Pay fees</i></td> <td>• <i>Access government documents</i></td> </tr> <tr> <td>• <i>Check status of applications, permits, and inspections</i></td> <td>• <i>Upload electronic plans and other documents or photographs</i></td> </tr> </tbody> </table> <p><i>Citizen Portal is available in English (U.S. and Australian), Spanish, French, Arabic, Chinese, Portuguese, and Vietnamese language packs. Additionally, we developed the solution so that all financial transactions are PCI DSS compliant. Furthermore, our solution is Section 508c compliant, to make our products accessible to people with disabilities—such as blindness and low vision.</i></p> <p><i>Purchase of Citizen Portal includes the mobile application, Mobile Citizen Portal, which further enhances accessibility</i></p>	• <i>Apply for permits</i>	• <i>Research parcels using Esri GIS</i>	• <i>Submit complaints</i>	• <i>View a history of all complaints/requests</i>	• <i>Submit requests for service</i>	• <i>View solution generated alerts and notifications</i>	• <i>View data on maps</i>	• <i>View all parcel history</i>	• <i>Conduct searches</i>	• <i>Search addresses/parcel information</i>	• <i>Pay fees</i>	• <i>Access government documents</i>	• <i>Check status of applications, permits, and inspections</i>	• <i>Upload electronic plans and other documents or photographs</i>
• <i>Apply for permits</i>	• <i>Research parcels using Esri GIS</i>														
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• <i>Pay fees</i>	• <i>Access government documents</i>														
• <i>Check status of applications, permits, and inspections</i>	• <i>Upload electronic plans and other documents or photographs</i>														

RFP Requirement Number	Requirement
3.1	<b>General System Characteristics</b>
	<p><i>options for public users. Constituents now enjoy a truly mobile access to government data, using iOS or Android devices.</i></p> <p><i>Citizen Portal inherits the exact business rules established in Land Management. System administrators simply select which service request activities are to be made available to the public. Additionally, the Civic Platform utilizes one central database—data submitted through Citizen Portal is immediately available for processing by back office users in Land Management.</i></p> <p><i>For a video showing how Baltimore County, MD is automating its code enforcement processes using Citizen Portal, visit <a href="http://bit.ly/1xyV3mP">http://bit.ly/1xyV3mP</a>.</i></p> <p><i>In summary, this component fulfills all bullet descriptions of this requirement.</i></p>
	<p>Mobile Access for City Staff</p> <ul style="list-style-type: none"> <li>• Ability for the system to support smart phones, iPads or similar mobility-related devices, laptops or other devices</li> <li>• Ability to access real-time data in the field, including applications, inspection history, fees, payments, plans and GIS data layers, and other relevant information</li> <li>• Ability to update information from the field and have the field data immediately update the project history files</li> </ul>
	<p><i>Accela Mobile provides both the end user at the agency and citizens many ways in which to conduct business 24/7/365. Overall, this component of the Civic Platform and the apps that have been developed by Accela and by numerous local developers for their communities extends Accela Mobile to outreach far and wide beyond those provided by other competing vendors. GIS accessibility is also supported in the field providing field inspectors and others with maps and other graphical representations of land areas.</i></p> <p>With the widespread adoption of mobile devices, we offer mobile capabilities for iOS or Android-based smart phones and tablets to bring processing to the field through our cloud-based Civic Platform.</p> <p><i>Our proven solutions for operational efficiency and civic engagement through mobile apps combine to provide extensibility by employing a dynamic cloud-based platform to support the needs of both agency employees and their user community. For complete details please see <a href="#">Section 4.1.3</a> of this proposal.</i></p>

RFP Requirement Number	Requirement
3.1	General System Characteristics
	<p>Financial Integration / Project Tracking and Reporting</p> <ul style="list-style-type: none"> <li>• Provide real-time tracking of project expenses and costs, including staff hours worked (in quarter hour increments), billable hours for outside consultants and other entities (i.e. City Attorney’s office), account balances, billing statements, and other related data, all of which must interface directly with the City’s financial application (Tyler MUNIS)</li> <li>• Ability to track hours worked on specific projects, including ability to record hours from mobile locations in the field</li> <li>• Ability to receive applicant deposits for projects and to bill against those deposits for City staff time worked, along with City Attorney and outside consultant costs</li> <li>• Ability to issue statements, invoices and reports relating to specific projects</li> <li>• Ability to easily update permit fees and maintain multiple permit fee schedules</li> </ul>
	<p><i>The solution provides an integral fee and cashiering solution that stands by itself for all permitting and other land management needs or it can be integrated to financial and accounting systems which has been completed in numerous implementations of the system. In this instance, the solution will be interfaced to the Tyler MUNIS system as part of our implementation services. All transactions, financial or otherwise, are performed in real time.</i></p> <p><i>The solution can track hours of any staff member or other individual having access to the system for management or billing purposes. Input can be reached via the back office, via the online portal, or via the Mobile component.</i></p> <p><i>Accounts, including Trust accounts or those to which applicants or consultants establish deposits to which fees and other charges are deducted is inherent in the solution.</i></p> <p><i>All printed output of the system is achieved using the Ad Hoc Report Writer or any one of the supported and seamlessly integrated reporting engines.</i></p> <p><i>The ability to easily update information, fee schedules and other system components is achieved using the System Administration Tools – an inherent system feature allowing for maximum configurability of the system to meet present as well as future business needs. Accela will train your System Administrators, both formally and informally, into the use of these tools to allow the City of Paso Robles independency from either Accela or other third parties when reconfiguration</i></p>

RFP Requirement Number	Requirement
3.1	General System Characteristics
	<i>needs to take place.</i>
	<p>Reporting and Query Tools</p> <ul style="list-style-type: none"> <li>• Full repository of LMS standard reports</li> <li>• Flexible ad hoc query for non-technical users with the ability to download to MS Excel</li> <li>• Ability to create custom reports</li> <li>• Customizable dashboard views to provide management the ability to monitor real-time data including plan check status, staff workload, permit status, fees collected, etc.</li> </ul>
	<p><i>Each implementation client is provided with standard reports which can be used as-is or reformatted to meet more specific agency needs.</i></p> <p><i>The solution provides the most comprehensive solution for allowing all users the ability to create ad hoc reports. The Ad Hoc Report Writer is an easy to use and point and click system enabling users without technical abilities to create their own reports. Virtually every field in the solution, including those that have been user-defined, can be employed for the purposes of queries, searches and reporting. This information can be exported to MS Excel.</i></p> <p><i>Custom reports, as noted earlier, can be created using the Ad Hoc Report Writer and for more complex reporting, any of the reporting engines (MS Reporting Services, Crystal Reports, and Oracle Reports).</i></p> <p><i>Dashboard functionality abounds providing each user the ability to graphically represent key data in near real time across a wide variety of formats (pie charts, line graphs, odometers, etc.). Such dashboards can be saved or shared with others.</i></p>



RFP Requirement Number	Requirement
3.1	General System Characteristics
	<p>GIS Integration</p> <ul style="list-style-type: none"> <li>• Ability to view land management information from ESRI GIS</li> <li>• Ability to link to ESRI GIS from the land management system</li> </ul> <p>Ability to generate mailing labels based on GIS data</p>
	<p><i>All GIS integration is available between the Civic Platform and the Esri GIS system through the GIS component. Accela is an Esri Gold Partner and has been an Esri partner for 20 years. This has given Accela access to Esri staff and valuable information for creating tight integration with the GIS industry leading technology. Accela's GIS gives users the option to initiate and manage all land management activities from a map interface. GIS is a bi-directional interface enabling viewing, interaction and presentation of both tabular and spatial information. Any list screen that contains address information can utilize Accela's GIS solution to geospatially display the addresses for end users. Agencies need to provide GIS data for their jurisdiction for Accela's GIS solution to provide this functionality. For comprehensive details of Accela's GIS capabilities, please see <a href="#">Section 4.1.5</a> of this proposal.</i></p>
	<p>Electronic Plan Submittal</p> <ul style="list-style-type: none"> <li>• System will have available an electronic plan submittal module, which will likely be considered for future implementation</li> </ul>
	<p><i>The functionality now existing in the Civic Platform provides this capability for immediate use at the City of Paso Robles. This feature resides as part of the Accela Electronic Document Review element. Accela Electronic Document Review (EDR) is designed to enable review staff to incorporate document review and markup directly into the existing Civic Platform processes that automate, organize, and track reviews. This adds end-to-end management of electronic documents assuring adherence to agency policies and codes. Electronic Document Review is a fully integrated feature within the Civic Platform that leverages different technologies to the agency's choice, enabling users to review regulatory documents faster and more easily.</i></p>

RFP Requirement Number	Requirement
3.1	General System Characteristics
	<p>Outlook Integration</p> <ul style="list-style-type: none"> <li>• Ability to generate and send e-mails and calendar events directly from individual permit windows</li> <li>• Ability to generate e-mail from within the application to parties included on the application or to other contacts and to view the associated e-mail correspondence from within the application record (for example, a manager, when in a permit record, can e-mail a staff member about the permit, and the e-mail will contain a direct link to the permit record)</li> </ul>
	<p><i>All elements of this requirement are inherently provided in the solution and available out of the box and/or with simple system configuration.</i></p> <p><i>Emails can be manually and automatically configured for sending through MS Outlook which is leveraged by the Civic Platform. There is no need to leave the permit windows to accomplish this activity. Emails may be pre-configured by authorized users to contain any information desired by the City, including links that can be embedded within the email.</i></p>
	<p>Ability to import Word, Excel, PowerPoint and pdf documents to attach to the application, with the ability to view the attachments from within the application record</p>
	<p><i>The solution provides enormous flexibility by allowing for the attachment/linkage of any file or document that exists in an electronic format. This includes digital photos and other files. Attached files may be viewed in the system and opened by authorized users in their native formats. These documents can reside in the solution as part of Accela Document Services, or reside in interfaced third party electronic document management systems. Accela has vast experience and success in creating interfaces to EDMS systems and has developed an API to aid in the intercommunication needed between both systems.</i></p>
	<p>Ability to generate and easily customize MS Word documents, including form letters and project corrections documents, from individual permits</p>
	<p><i>Authorized users having been granted the appropriate security privileges from your system administrators have the ability to generate and customize all manner of documents, including letters, notices, permits, checklists, standard comments, and others that emanate from system data.</i></p>

RFP Requirement Number	Requirement
3.1	<b>General System Characteristics</b>
	Comprehensive search ability into active and historic records by street name, street number, APN, developer, contractor, plan check number, building permit number, owner name, general project description, tract number, parent parcel number, business name, etc.
	<i>The solution provides the widest capabilities in this realm by allowing authorized users to search any and all fields in both active and historical records by any fields available in the system.</i>
	Ability to view items identified in a search without having to open and close each item
	<i>This ability is inherent to the search capabilities provided by the Civic Platform. Users can also move columns and make other adjustments to data found from search criteria. Additionally, the solution provides a search screen with many features to allow authorized users to refine their search criteria.</i>
	Contain master files for architects, contractors, owners, tenants, engineers and developers including contact information (including multiple telephone numbers and e-mail addresses) and license numbers
	<i>A Contacts database exists within the solution to allow any client to designate and categorize an unlimited number of contact types and contact information. Configuration supports the generation of any and all user-defined fields to assist in tracking specific information regarding each contact type.</i>
	Interface with the State licensing database to determine if contractor licenses are active
	<i>Accela has created this interface numerous times as part of its implementation services for its California clients. Accela has included pricing in this proposal to account for this interface. See <a href="#">Pricing</a> section for details.</i>
	Ability to add warnings or flags with notices or restrictions to addresses or APNs
	<i>Flags, notices, warnings, notifications and other facets exist within the system to alert internal and external parties to key information, including those related to addresses and APN information. These exist through manual and direct user action or they can be configured to occur automatically based on system factors like time, events, statuses, etc.</i>
	Audit trails to record user activity

RFP Requirement Number	Requirement
3.1	<b>General System Characteristics</b>
	<p><i>With respect to transactional information, the System Audit Trail assures accountability and transparency by providing who did what and when information. Even updated, changes, deletions, etc. performed by system administrators and delegated others fall under this audit trail. Civic Platform provides transaction logging, or “audit history” throughout the product to show changes made to records and tasks. Transaction logs information including the change made, the date and time of change and the User ID as well as the listing the action itself. Once this information is saved, it cannot be changed by an unauthorized user and if it is changed by a system administrator for any reason, that administrator’s date and time stamp, logon ID and change will be reflected in the workflow assuring the strictest security to this aspect of every transaction. By the techniques inherent to the system, strict accountability is assured for all configured processes. The City can allow agency administrators, supervisors, and other users to view the transaction log of changes to status records within an application record. The Record Status History audit log displays when a user clicks the View Log button in the Application History tab in the user application view. Details recorded in the audit log include the status history number, record status, the person who updated the status record, and the date the status record was updated.</i></p>
	Workflow management tools for each user, with customizable dashboards to manage project deadlines
	<p><i>Accela Workflow provides the most flexible and highly robust mechanisms to follow business rules exactly and without vigilance. Accela’s Workflow Designer has the ability to mimic any agency’s simple or complex workflow, and allows every aspect of each key business process to be configured in the Civic Platform. This tool efficiently guides each process from task to task, from initialization to completion, but it also:</i></p> <ul style="list-style-type: none"> <li>• <i>Facilitates key task assignments</i></li> <li>• <i>Allows the definition of duration for each of the tasks</i></li> <li>• <i>Automatically sets due dates based on task durations</i></li> <li>• <i>Task tracking: who is assigned to handle the task, task status, location of pertinent data about the completion of the task</i></li> </ul> <p><i>As previously noted, Dashboard functionality provides each user with the ability to configure information key to their interests as administrators, supervisors, plan reviewers and others, in real time and under a wide variety of graphical presentation formats. Further details of workflow management are provided in <a href="#">Section 4.1.7</a> of this proposal.</i></p>

RFP Requirement Number	Requirement
3.1	General System Characteristics
	Role-based user security profiles
	<p><i>Accela's Civic Platform provides a multi-level security system where the system administrator has full control on user access. This control on user access is granted based on a single user logon ID and grants that user specific rights and privileges to the system. Our Civic Platform also allows system administrators to set up groups or roles and set security based on those such as read only, update or no access. Our security goes beyond this setup to the functional level, allowing administrators to set security down to a specified function. For example, an Investigator may have read-only access in Land Management, but no access to "Add Fees". These rights and privileges can be extended to internal users, other departments, outside agencies, and even public citizens and applicants to safeguard the sanctity of system information.</i></p> <p><i>Individuals as well as groups can have one or more distinct security rights and system administrators can have universal rights and privileges or assign such rights to other designated and duly authorized users. These rights and privileges can be extended to internal users, other departments, outside agencies, and even public citizens and applicants to safeguard the sanctity of system information.</i></p>
	Calculate applicable fees, accept payments (cash, check or credit card), and generate a payment receipt
	<p><i>The solution has had the ability to calculate flat, arithmetic and algebraic expressions since its very first legacy release over three decades ago. Payments can be accepted in various ways at the back office (check, cash, credit card, vouchers, e-checks, money orders, etc.) while Citizen Portal, the online web portal of the solution accepts checks, credit cards through interfaced payment providers. Accela will develop an interface to the City's recommended payment vendor as part of its implementation services.</i></p>
	Ability to issue refunds or adjustments to fees

RFP Requirement Number	Requirement
3.1	<b>General System Characteristics</b>
	<i>Administrators can configure Civic Platform to enable processing tools that allow for easy intake of payments across multiple records and Point of Sale (POS) items. Citizens can pay for fee items using multiple tenders at the agency's place of business. Agency cashiers handle payments for each record by manually entering the payment information, or using a magnetic card reader to read credit card information. The Civic Platform allows you to make adjustments to different accounts, for example, if you make an accounting error, you can make the necessary correction. Adjustments allow you to add or remove money from an account.</i>
	Utilize the City's accounting codes associated with fees
	<i>Every fee configured in the system can be associated with the appropriate accounting codes the City is now employing. The system allows for this configuration to occur providing every payment one or more categories of accounts to which all or a portion of the payment can be associated with.</i>
	Interface with the City's business license system to validate license existence
	<i>While the Accela Civic Platform inherently contains a licensing component that is being employed at city, county and state agencies, Accela will develop an interface to the City's business license system for the purpose of validating the existence of a current license.</i>
	Provide forms and applications that can be completed and submitted electronically
	<i>All information in the Civic Platform exists electronically. Forms and applications can be completed online and submitted through Citizen Portal, the web portal of the solution. The City has the ability to make any type of request, complaint, permit, license, or other application type available to applicants and citizens on this web portal.</i>
	Provide an online knowledge base to assist users with application use
	<i>All users of the solution have immediate access to Accela Community, an online site where a wealth of information is available regarding every aspect of the Civic Platform. This community also provides a forum where users can communicate with one another on aspects and issues of mutual interest. This site exists in addition to the Context Sensitive Help provided by the solution to assist users at precisely the point where such assistance is needed.</i>

RFP Requirement Number	Requirement
3.1	<b>General System Characteristics</b>
	Maintain multiple fee schedules with effective dates
	<i>Fee schedules may be created by authorized users with start and end dates as applicable. All records using a particular and historical fee schedule will maintain fees and calculations exactly as they existed at the time the fee/calculation was assessed/made to assure the validity of all information at that time.</i>
	Provide user defined fields for added information flexibility
	<i>The solution provides authorized users the ability to create as many user-defined fields as necessary to capture information. Such fields can exist as data entry fields up to full comment fields assuring that the City has the unique ability to capture all information needed for a given process or application.</i>

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RFP Requirement Number	Requirement
3.2.1	Building Permit Processing
	Robust Plan Check tracking capabilities - Ability to track date received, routed, due date for review for internal and outside reviewers and provide real-time status report for individual and overall permit process plan check timeframes
	<i>All of the unique elements of this requirement are achievable in the solution and are being accomplished by virtually hundreds of land management agencies across the country. Plan checking can be configured to strictly abide by the City's business rules regarding due dates, assignments, time durations, etc. The status of every task configured in Accela Workflow provides authorized users, including those that access the solution through its web portal, the ability to view this real-time status 24/7/365.</i>
	Provide a simple and unified solution to create, track and view all submitted documents, corrections, permits, conditions, fees, inspections, resolutions, and ordinances associated with a permit
	<i>The solution inherently fulfills all aspects of this requirement to authorized users, including those accessing the web portal, if deemed acceptable by the City. The solution is a holistic system providing an accurate record of all actions, documents, reviews, tasks, conditions, etc. Even actions to change, delete or modify transactional information is maintained in an audit log assuring the City that all participants and their actions are accountable and transparent to administrators and others.</i>
	Provide ability for the public to access project status via the web
	<i>The ability for the public to access and view the status of any application, permit, complaint, request or other configured record type is only one of many activities that can be undertaken by citizens on the online web portal.</i>
	Ability to utilize an automated document tracking process (e.g. barcoding) on all permit documents submitted or generated for a project
	<i>Agency reports and documents developed in Civic Platform can use barcodes to enhance process efficiency. Barcodes imprinted in the reports or invoices must follow code 39. Each barcode represents some field value, for example, record ID, receipt number, and invoice number. With the reports in the documents portlet, you can embed a hot key combination in a barcode. When users scan the barcode, the cursor automatically moves to the field indicated by the hot key setting, and the value in the barcode populates the field.</i>
	For over-the-counter building permit approvals, the ability to automatically generate an approval letter and invoice for payment



RFP Requirement Number	Requirement
3.2.1	<b>Building Permit Processing</b>
	<i>Letters, invoices and other needed documents can be configured to be automatically generated upon the selection of a given status (e.g. an Approval). These documents would be pre-generated as report templates using either of the two available reporting mechanisms (e.g. Ad Hoc Report Writer or Reporting Engines).</i>
	Ability to track the date plans were received and routed to all of the reviewers, along with the date the comments are due; and the ability to generate status reports
	<p><i>Dates such as those shown are typically handled as part of Accela Workflow in order to maintain reliable information as to their receipt and routing to others. Such configured tasks would also indicate the number of days the specific task can take (e.g. task duration). Other elements available for configuration that we have previously mentioned would include the task owner.</i></p> <p><i>The ability to generate status reports is available to all authorized users having been granted that authority by your System Administrators. Status, as noted earlier, is available for viewing 24/7 on a record-by-record basis, but reports can be generated to assess status at any time whether for one record or many.</i></p>
	Ability to accept payments online
	<i>Accela and its solutions have made online payment through the web portal for over 15 years. This ability is now available to over 150 citizens nationally through their local and state governments. The solution accepts credit cards, debit cards and e-checks through its online portal.</i>
	Ability to track the location of plans when corrections are required; i.e. the plans were picked up by the architect and the date the plans were picked up
	<p><i>Configuration can account for tracking the physical location of plans as needed. However, many public agencies are now requiring architects, engineers and others to submit their plans in an electronic format. Having such plans available electronically means that reviewers can easily access these plans (e.g. attached to the permit or application record) and employ the electronic plan review feature of the Accela Electronic Document Review functionality, described in an earlier response.</i></p> <p><i>Dates including those for plan submission, plan review, and plan pick-up can all be configured as part of Accela Workflow tracking these dates exactly and indicating responsibility for the individual who received the plans, individual(s) who participated in plan review, and the individual who returned the approved plans to the submitter.</i></p>

RFP Requirement Number	Requirement
3.2.1	<b>Building Permit Processing</b>
	Ability to track status of corrections by a reviewer, which may activate approval or redistribution / re-routing to applicable departments
	<i>Accela Workflow can very uniquely activate all additional reviews, routing and re-routing, by their configuration. The status that a reviewer assigns (e.g. an agency-determined terms such as Return to Applicant, Approved, etc.) will automatically direct the task to its next logical task owner. This will automatically cause the document and its corrections to be returned to the submitter for further input and resubmittal for as many times dictated by business rules, or move the task to the next task owner for their input (e.g. an approval from Structural section may move the plans to next be reviewed by the Mechanical section). The solution also allows for simultaneously reviews to take place if allowed.</i>
	Ability to automatically generate a report to identify applicants that have not responded to correction notices after a specified number of days
	<i>These types of cause and effect actions can be configured to take place in the solution to alert both staff and applicants of expirations, deadlines, and other time-dependent actions. A report can be generated that would be triggered by the system according to time parameters as described in this requirement.</i>
	Ability to automatically generate a report to identify applicants with issued building permits that have not requested an inspection after a specified number of days
	<i>This simple report can be easily generated and exists at many of our client sites and is typically a precursor to the notice of an expiration of a permit according to agency business rules.</i>
	Ability to generate warning letters to applicants whose permits will expire and update the record that the applicant was notified
	<i>Both the ability to create the warning letter using the Ad Hoc Report Writer and updating the record (can exist as a configured workflow task) are inherently available in the solution. In fact, the notification task can be configured to automatically print the warning letter.</i>
	Online ability to view permit history for an address
	<i>All authorized users have the ability to search for an address (every field in the solution exists as a search parameter) and once found, to click and immediately view the entire history of an application, permit or other configured active or historical case type.</i>
	Ability to enter new fee codes prior to the effective date of the rate change

RFP Requirement Number	Requirement
3.2.1	<b>Building Permit Processing</b>
	<i>This ability has existed since the time the first fee schedule was available in our solutions. Fee schedules and the information they contain (e.g. fee codes) can be pre-established and automatically engaged when such schedules come into effect.</i>
	Ability to a set of permits and associate them with one another
	<i>The Civic Platform offers public agencies and their authorized users the ability to associate any one record with any other record or records. This becomes useful for a large project that may contain many types of records that need to be linked or associated with one another. By linking, all records will be displayed to the authorized user and by simply clicking on a given record, the entire contents of that record will become available.</i>
	Ability to tag and filter permits by type (example: Green permits include solar and other subcategories)
	<i>This requirement can be fulfilled by conducting a query of those permit elements needed for viewing (e.g. all green permits).</i>
	Robust reporting capabilities that provide data including average number of days for plan check completion, average inspection times, etc., along with establishing “standard” reporting to be generated and distributed on a scheduled basis
	<i>Reports of this type are of strategic importance to managers and administrators and can be used to change or modify business rules and procedures to improve staff efficiency and effectiveness. Reports can be generated using the supported and seamlessly integrated reporting engines (MS Reporting Services, Crystal Reports, and Oracle Reports). Distribution of these reports can be made by manual intervention or configured to occur automatically as noted previously.</i>

RFP Requirement Number	Requirement
3.2.2	<b>Building Inspections</b>
	While working in the field, remote access to the system in real-time using a mobile device is desired to view the permit application, results of previous inspections, and to input the current inspection results
	<i>The Civic Platform provides a major component (Mobile) that provides complete functionality for all inspectors and other field personnel. Mobile can operate in both connected environments and in those in which connectivity is not present or available. Field staff have the ability to view all details of a permit application, previous inspections and their results and comments as well as allowing the input to scheduled or unscheduled inspections (e.g. ad hoc inspections). Mobile also provides GIS capabilities that greatly assist the inspection process in all communities. In our first response to Section 3.1, we described the complete capabilities of this mobile component.</i>
	While working in the field, ability to record inspections (with photos) directly into permit system and print inspection corrections for contractors
	<p><i>The Mobile component of the Civic Platform fulfills this requirement. Inspectors having devices that have the capabilities for our Mobile application as well as camera capabilities can easily take photographs at inspection sites and immediately associate them with the inspection record. If two devices are needed, the camera device would need to be able to load or transfer said images into the Mobile solution.</i></p> <p><i>Reports (e.g. inspection notices, inspection corrections, etc.) can be pre-configured and with portable printers provide the capability for field printing. This field process provides great efficiency by being able to directly provide any field document to pertinent parties while in the field.</i></p>
	Ability to complete an unscheduled inspection while in the field and enter the inspection results into the system using mobile access
	<i>Ad hoc or drive-by inspections (e.g. those which are not previously scheduled) can be completed with the same functionality, features and tools available to those that are previously scheduled using the Mobile component of the solution.</i>
	When the maximum number of inspection requests has been reached for the day, automatically schedule the inspection for the following business day

RFP Requirement Number	Requirement
3.2.2	<b>Building Inspections</b>
	<i>The solution allows for system administrators to determine the maximum number of inspections across any inspection type and according to agency requirements including maximum time per inspection and other factors. The system will track and not allow inspections to be scheduled above the configured maximum number and will direct the inspection requester to other future available inspection dates/times.</i>
	Provide a customer portal to request inspections, view inspection results and cancel requested inspections
	<i>As we have previously noted, Citizen Portal provides extensive functionality available to applicants, contractors, citizens and others including the ability to request inspection, view results (and comments, if allowed), and to cancel previously requested inspections. For the latter, the City can set how much time before the actual inspection takes place to allow for a cancellation and/or penalty to be assessed as applicable.</i>
	Ability to send inspection schedule updates to customers via text message and e-mail
	<i>The solution provides the functionality for authorized users to automatically and manually send inspection updates to customers using text messages and email.</i>
	Ability to track the expiration of a deferred plan check (i.e. trusses, stairs) and if expired, lock inspection requests for failure to submit deferred plans for approval in a timely manner
	<i>This type of cause and effect relationship is supported by the solution by system configuration and can be applied to many areas where the failure to accomplish a particular task results in the triggering of an action, in this case locking the ability to make inspection requests.</i>
	Ability to attach photos and videos to inspection records
	<i>The solution supports the attachment of any type of document or file that exists in an electronic format to be attached to a record, including photos and videos to inspection records.</i>
	A check-off in the system to confirm the inspector has received all paperwork
	<i>This can be configured as a user-defined field, or as a workflow task.</i>
	Centralized approval process; provide the inspector with the ability to identify any outstanding issues that prevent scheduling the final inspection

RFP Requirement Number	Requirement
3.2.2	<b>Building Inspections</b>
	<p><i>This requirement is inherently fulfilled by the Civic Platform. All approvals can be configured and conducted using Accela Workflow so that there is a auditable record of each action or task related to building inspections. In this fashion, the inspector in the field using Mobile, will have the ability to view and identify any outstanding issues or other matters directly affecting the site as well as any inspection, final or otherwise.</i></p>

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RFP Requirement Number	Requirement
3.3	<b>Planning Division</b>
	Ability to utilize the same plan check tracking module as the building system
	<i>Hundreds of planning agencies nationwide are using an Accela legacy solution or the Civic Platform to completely track, monitor and automate their planning activities. The land management component of the Civic Platform provides for full and complete functionality for both building and planning agencies employing a single database while allowing for the specific applications, processes, workflows, fees, inspections, etc. to be separated and defined according to business rules. The system is comprised of a series of components all under the banner of the Accela Civic Platform including plan checking.</i>
	Ability to identify a project by entitlement type and manage a unique process for each type of entitlement
	<i>Projects or any their sub-components (entitlements, etc.) may be configured and managed to strictly abide by the City's unique processes. This flexibility is an inherent feature of the land management and other components of the solution.</i>
	Ability to log and organize correspondence, technical reports (including large pdf documents), Environmental Impact Reports, project history, notes, site photos, public comments, resolutions, ordinances, and conditions of approval
	<i>Whether logged in the system into fields including comment fields and others, or as attachments to records, all manner of reports, notes, photos, etc. mentioned in this requirement are entirely supported and available for viewing by authorized users 24/7/365. The City also has the ability to make some of these documents and information available to applicants and others via the online web portal, Citizen Portal.</i>
	Ability to easily upload pdf's and plotter scans
	<i>The Civic Platform assigns the selected virtual folder group to the current record type. Folders contained within are available to users when they upload documents or scans to records of the current type.</i>
	Ability to track the dates that plans were received and routed for review, and the date plan review is due from each reviewer (Same Plan Check tracking capabilities as building module - ability to track date received, routed, due date for review for internal and outside reviewers and provide real-time status report for individual and overall permit process plan check timeframes)

RFP Requirement Number	Requirement
3.3	<b>Planning Division</b>
	<p><i>The City can configure all dates received, due, routed, out, etc. in Workflow capturing this data and thus making it a permanent record in the system.</i></p> <p><i>The ability to provide real-time status reports also exists although if configured in Workflow this status will be displayed to all authorized users, including those related to reporting on task durations (e.g. how long it took overall for the permit process to be completed).</i></p>
	Ability to track the date plans were received and routed to all of the reviewers, along with the date the comments are due; and the ability to generate status reports
	<p><i>The information contained in this requirement is inherent to data the system can track and display as part of its Workflow component.</i></p> <p><i>The ability to generate status reports on one or more records exists using either of the reporting mechanisms.</i></p>
	Ability to track the location of plans when corrections are required; i.e. the plans were picked up by the architect and the date the plans were picked up
	<p><i>System configuration can account for tracking the physical location of submitted plans in hard copy. With electronic plans, these can be simply attached to the application and thus made available to all reviewers and others to accomplish their predefined tasks and activities. In both cases, dates relative to who picked up the plans and when can be configured for entry into Workflow.</i></p>
	Ability to track status of corrections by a reviewer, which may activate approval or redistribution / re-routing to applicable departments
	<p><i>The Accela Electronic Plan Review element of the Civic Platform inherently allows corrections to plans and other documents to be made by authorized staff as well as being able to return such corrected or marked-up plans to architects, engineers, and other submitters. Like other workflow tasks, correction status may be obtained to authorized staff and online viewers. Such status selections may be configured to automatically engage other steps including new reviewers and others, all as defined by the City's business rules.</i></p>
	Ability to automatically generate a report to identify applicants that have not responded to correction notices after a specified number of days



RFP Requirement Number	Requirement
3.3	<b>Planning Division</b>
	<i>This requirement represents a simple report that can be generated and automatically triggered for printing after an elapsed number of days have passed from a given date or action.</i>
	Ability to automatically generate a report to identify applicants with issued building permits that have not requested an inspection after a specified number of days
	<i>This report is similar to the one directly above and can be generated using either of the two reporting tools previously noted. Configuration can cause the automatic generation of the report template.</i>
	Robust reporting capabilities that provide data including average number of days for plan check completion, average inspection times, etc., along with establishing “standard” reporting to be generated and distributed on a scheduled basis
	<i>Reports of the type noted can be generated using the supported and seamlessly integrated reporting engines.</i>
	Ability to track a variety of user-defined dates for noticing of meetings for Development Review Committee, Planning Commission and City Council <ul style="list-style-type: none"> <li>• Ability to track applications that will require the approval of the Planning Commission and/or City Council</li> <li>• Ability to associate applications with the scheduled Planning Commission and/or City Council meeting schedules and view the items associated with specific meeting dates</li> <li>• Ability to record the actions taken by the Planning Commission / City Council</li> <li>• Ability to generate letters to the project representative specifying action taken</li> </ul>
	<p><i>All of the dates shown in this requirement can be configured in the solution for data entry as well as for printing documents or serving other business purposes.</i></p> <p><i>Any type of application may be configured and subsequently tracked, monitored and reported upon.</i></p> <p><i>Applications may be associated with specific meeting groups and all can be associated with specific meeting dates. Details and results from those meetings may also be captured in Workflow, attached to the record or generated into applicable reports to project representative and/or others.</i></p>

RFP Requirement Number	Requirement
3.3	Planning Division
	<p>Ability to manage California Environmental Quality Act (CEQA) filing date, level of review, studies, notes, documents and deadlines</p> <ul style="list-style-type: none"> <li>Configurable system-generated “form letter” Public Hearing notices utilizing MS Word. Public hearing notices should include case / project number, applicant, locations, California Environmental Quality Act (CEQA) determination, and project description</li> <li>Ability to generate a mailing list utilizing the GIS buffering function. Public Hearing notices should include case / project number, applicant, location, California Environmental Quality Act (CEQA) determination, and project description</li> </ul>
	<p><i>Virtually all public agencies where the Civic Platform has been installed in California (over 50 in total) are using the solution to manage and report from CEQA data and information. All related documents, tasks, activities, actions, notes and deadlines can be configured in the application.</i></p> <p><i>Letters of an infinite variety may also be generated by authorized users consisting of form letters or including more specific letters with conditions and other details drawn from the save system data.</i></p> <p><i>Mailing lists may be developed by buffers or polygons for the purposes of noticing and mailing of information.</i></p>
	Allow simultaneous access for multiple users to input plan review conditions and comments
	<i>The solution allows for simultaneous access for as many authorized users as possible to the solution or to any of its components at all times.</i>

RFP Requirement Number	Requirement
3.4	<b>Engineering (Community Development City Engineer)</b>
	Ability to track the date applications were received and routed to all of the reviewers, along with the date the comments are due; and the ability to generate status reports
	<p><i>Dates such as those shown are typically handled as part of Accela Workflow in order to maintain reliable information as to their receipt and routing to others. Such configured tasks would also indicate the number of days the specific task can take (e.g. task duration). Other elements available for configuration that we have previously mentioned would include the task owner.</i></p> <p><i>The ability to generate status reports is available to all authorized users having been granted that authority by your System Administrators. Status, as noted earlier, is available for viewing 24/7 on a record-by-record basis, but reports can be generated to assess status at any time whether for one record or many.</i></p>
	Ability to accept payments online
	<p><i>The solution has had the ability to calculate flat, arithmetic and algebraic expressions since its very first legacy release over three decades ago. Payments can be accepted in various ways at the back office (check, cash, credit card, vouchers, e-checks, money orders, etc.) while Citizen Portal, the online web portal of the solution accepts checks, credit cards through interfaced payment providers. Accela will develop an interface to the City's recommended payment vendor as part of its implementation services.</i></p>
	Ability to track the location of plans when corrections are required; i.e. the plans were picked up by the architect and the date the plans were picked up
	<p><i>System configuration can account for tracking the physical location of submitted plans in hard copy. With electronic plans, these can be simply attached to the application and thus made available to all reviewers and others to accomplish their predefined tasks and activities. In both cases, dates relative to who picked up the plans and when can be configured for entry into Workflow.</i></p>
	<p>Ability to track status of corrections by a reviewer, which may activate approval or redistribution / re-routing to applicable departments</p> <p>(Same Plan Check tracking capabilities as building module - ability to track date received, routed, due date for review for internal and outside reviewers and provide real -time status report for individual and overall permit process plan check timeframes)</p>

RFP Requirement Number	Requirement
3.4	<b>Engineering (Community Development City Engineer)</b>
	<i>Accela Workflow can very uniquely activate all additional reviews, routing and re-routing, by their configuration. The status that a reviewer assigns (e.g. an agency-determined terms such as Return to Applicant, Approved, etc.) will automatically direct the task to its next logical task owner. This will automatically cause the document and its corrections to be returned to the submitter for further input and resubmittal for as many times dictated by business rules, or move the task to the next task owner for their input. The solution also allows for simultaneous reviews to take place if allowed.</i>
	Ability to automatically generate a report to identify applicants that have not responded to correction notices after a specified number of days
	<i>This requirement represents a simple report that can be generated and automatically triggered for printing after an elapsed number of days have passed from a given date or action.</i>
	Ability to automatically generate a report to identify applicants with issued building permits that have not requested an inspection after a specified number of days
	<i>This report is similar to the one directly above and can be generated using either of the two reporting tools previously noted. Configuration can cause the automatic generation of the report template.</i>
	Ability to generate warning letters to applicants whose permits will expire and update the record that the applicant was notified
	<i>Both the ability to create the warning letter using the Ad Hoc Report Writer and updating the record (can exist as a configured workflow task) are inherently available in the solution. In fact, the notification task can be configured to automatically print the warning letter.</i>
	Online ability to view permit history for an address
	<i>Every authorized user has the ability to easily view the entire history of one or more permits that exist for a given address or parcel.</i>
	Ability to enter new fee codes prior to the effective date of the rate change
	<i>This ability has existed since the time the first fee schedule was available in our solutions. Fee schedules and the information they contain (e.g. fee codes) can be pre-established and automatically engaged when such schedules come into effect.</i>
	Ability to “link” a set of permits and associate them with one another

RFP Requirement Number	Requirement
3.4	<b>Engineering (Community Development City Engineer)</b>
	<i>The Civic Platform offers public agencies and their authorized users the ability to associate any one record with any other record or records. This becomes useful for a large project that may contain many types of records that need to be linked or associated with one another. By linking, all records will be displayed to the authorized user and by simply clicking on a given record, the entire contents of that record will become available.</i>
	Ability to tag and filter permits by type (example: Green permits include solar and other subcategories)
	<i>This requirement can be fulfilled by conducting a query of those permit or planning application elements needed for viewing (e.g. all green permits/applications).</i>
	Robust reporting capabilities that provide data including average number of days for plan check completion, average inspection times, etc., along with establishing “standard” reporting to be generated and distributed on a scheduled basis
	<i>Reports of this type are of strategic importance to managers and administrators and can be used to change or modify business rules and procedures to improve staff efficiency and effectiveness. Reports are generated using the supported and seamlessly integrated reporting engines (MS Reporting Services, Crystal Reports, and Oracle Reports). Distribution of these reports can be made by manual intervention or configured to occur automatically as noted previously.</i>
	Ability to attach specifications, documentation and other files necessary for the applicant to be aware of the requirements and have a full understanding of the background of said requirement
	<i>Documents may be made available to individual applicants or to the public via the online web portal of the solution. This provides the ability for such individuals to have a complete understanding of any submission requirements or other information, to which the City desires them to have easy access.</i>

RFP Requirement Number	Requirement
3.5	<b>Counter Support Staff</b>
	Provide a complete and functional system to collect, bill to, and track applicant deposits. In addition to functionality for billing for staff, attorney, and consultant time against the applicant deposit, the system needs to include processes for automated notification of deposit amount available, the need to provide additional deposit amounts, and the ability to refund remaining deposit once project is complete
	<p><i>The solution provides complete fee and cashiering functionality. This feature allows for the collection of fees and other payments whether related to specific records or not. Information in the system can also be employed for the purpose of generate reports to form bills and invoices. Applicant deposits to trust accounts are also supported.</i></p> <p><i>All transactions accomplished in the solution are done so in real-time such that balances reflect actual balances against any deposits or debits transacted. Receipts, containing any information the City desires to include, can be generated and printed upon the completion of every successful transaction and automated notifications may also be configured to occur. For Trust Accounts, the City can establish minimum deposit levels such that any transaction bringing the balance below that threshold will cause an automatic email to be sent to applicable parties. If at project end, there are monies remaining in the trust account, or if there are funds made through overpayment previously, these funds may be refunded according to the City's business rules. Again, all such transactions will be reflected in real time and will be subject to audit trail provisions.</i></p>
	Provide an electronic interface between the new system and the City's Tyler MUNIS financial system to eliminate duplicative data entry
	<i>Accela will develop an interface to the Tyler MUNIS system as part of its implementation activities. Pricing to accommodate this interface has been included under this proposal. Please see <a href="#">Pricing</a> section for details.</i>
	Provide reporting for pending permit expiration, along with automatic generation of notification to applicant via the applicant's preferred notification method
	<p><i>Reports can be generated on all system data using both reporting tools, including that related to pending permit expiration.</i></p> <p><i>Applicants have the ability to designate their preferred notification method which can be captured in the system. All automatic notification from that point forward will follow that preferred method.</i></p>
	Include all permit types (building, encroachment, grading, etc.) as a part of the new system such that the tracking of permit expiration, completion, etc. is done through a single database accessible by all staff

RFP Requirement Number	Requirement
3.5	Counter Support Staff
	<p><i>Accela will configure all permit and application types that are included as part of its Final Agreement with the City of Paso Robles. The Civic Platform operates as a single database system allowing information across all departments and channels to be included, shared and reported upon. All authorized users having the appropriate privileges assigned by your system administrators have the ability to access the solution for the purposes of completing their work.</i></p>

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RFP Requirement Number	Requirement
3.6	<b>Public Works Department</b>
	Ability to incorporate a formal project review process for Water division, Wastewater division and all other areas of the Public Works Department that should be a part of the project review process
	<i>The solution provides the ability for an agency to configure any process from start to finish, including those related to other departments that have bearing on a land management application or permit. This universal ability allows Civic Platform clients the ability to orchestrate the inclusion of all applicable parties to any process whether existing within the agency or externally.</i>
	Ability to easily access and extract property owner / developer contact information
	<i>The system has the ability to capture any and all information the City desires regarding Contacts such as property owners and developers. This component is easily accessible to the authorized user and this information can be extracted using the reporting tools.</i>
	Ability to access approvals, plans, and other project related data
	<i>Access to a given record and the information contained within or associated with it is available to authorized users. Approvals are found in Workflow, plans and their corrections can be found as attached documents and related data may exist throughout the record.</i>
	Ability to utilize the new system for Public Works inspection activities, including Water, Wastewater and other Public Works related inspections
	<i>As we have noted in many of our responses, the system can fulfill the processing and inspection needs of any public agency through the flexibility offered by its system configuration. Therefore, Public Works activities may likewise be configured making use of all of the existing system components, features and functionality.</i>
	Ability to issue notice of violation related to Public Works inspection outcomes
	<i>The identical functionality available to issue NOVs for the City's permitting division exists for its Public Works division, including that related to inspection outcomes.</i>
	Ability to track and monitor public improvement plan check and infrastructure reviews, demand analysis reviews and utilities plans



RFP Requirement Number	Requirement
3.6	Public Works Department
	<i>In a likewise manner, the system provides its tracking and monitoring functionality to public improvement projects that encompass plan check and infrastructure reviews, demand analysis reviews and employing utility plans as part of this overall process.</i>

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RFP Requirement Number	Requirement
3.7	<b>Code Enforcement</b>
	Ability to track code enforcement cases in a system that is accessible to all City departments via dashboard functionality
	<i>Code enforcement processes may be configured, tracked and reported upon in full employing the Civic Platform. The City has the ability to configure as many different case types each with its own processes, hearings, fees, etc. This information can be made readily available to all City departments according to the licensing agreement between Accela and the City. Dashboards can also be created in a multitude of graphical formats for tracking information regarding these enforcement cases and made available to all authorized users.</i>
	Ability to auto-generate form letters in MS Word that can be customized as needed with auto-references to applicable City Municipal Code sections
	<i>Agencies can create frequently used letters and forms that use run-time variables to populate data from the Civic Platform database. Variables can be standard session variables such as today's date and your agency name. Variables can also be custom SQL queries that extract specific data. For example, a warning letter to a citizen about specific code violations can populate with the current date and your agency name using session variables. You can use custom variables for the agency contact information, owner contact information as well as the code violation case # and description. The letter can also include an image, such as the agency's logo. You can develop letters and forms using Microsoft Word templates that you save as Rich Text Format (RTF) files. You add these files to Report Manager; they are accessible from the Report Portlet or portlet specific reports menus. You can also save these files to an Electronic Document Management System (EDMS). You also define the EDMS object to save the report to a record, parcel, workflow, asset condition assessment, inspection, or set. For example, you can save an approval letter to build a new structure to the building permit record.</i>
	Ability to track City department(s) responsibility for code cases, and to be able to transfer and / or split responsibility between City departments
	<i>All types of code enforcement cases may be configured for tracking in the solution. Each activity element or task may have a unique task owner that may exist from any City department or even extend to allow participation by third parties who have been granted access to the system and can thus access it through a standard web browser. This functionality supports the ability to assign, transfer or split responsibility to those having that case/task responsibility.</i>
	Integrated e-mail – the ability to e-mail from the case and to view all e-mail activity in the case

RFP Requirement Number	Requirement
3.7	<b>Code Enforcement</b>
	<p><i>The solution supports email integration and the ability to view all associated emails sent/received. Accela’s communication management features improve communication and promote civic engagement by managing email, SMS text messaging and calendar integration. Communication Manager includes:</i></p> <ul style="list-style-type: none"> <li><i>• Microsoft Outlook integration enabled via Microsoft Exchange Server, which includes sending and receiving email communication to and from the Civic Platform, checking availability of users for meetings or events via their Outlook calendars, and displaying scheduled Civic Platform tasks, activities, inspections or other information on a calendar</i></li> <li><i>• The ability to send SMS text messages from an agency’s SMS text message provider account</i></li> <li><i>• An agency-level correspondence list to keep track of communications initiated from and received by the Civic Platform, including emails, text messages and meeting invitations</i></li> <li><i>• A record-level consolidated communication list containing a summary of emails, SMS text messages, meetings, activities, inspections, documents and workflow history applicable to each record</i></li> </ul>
	Ability to link photos, video and audio to the case
	<i>The solution inherently provides the ability for an authorized user to link any type of document or file in an electronic format to a case, inspection, etc. including photos, videos and audios.</i>
	Automated re-inspection scheduling
	<i>System configuration supports this requirement by allowing inspections to be automatically rescheduled according to business rules (e.g. failed inspection, etc.).</i>
	Ability to route the day’s inspections for each inspector, with the ability to add stops
	<i>Both of the listed elements of this requirement are inherently supported by the solution.</i>
	Ability for citation issuance to create an accounts receivable automatically, generate monthly statements and assess penalties for late payment
	<i>Configuration of the system using its System Administration Tools can account for the appropriate debit to exist, the generation of monthly statements and any penalties after a given citation has been issued.</i>

RFP Requirement Number	Requirement
3.7	<b>Code Enforcement</b>
	Ability to issue a receipt from the system
	<i>System configuration can be conducted to automatically issue a receipt any time a transaction is enacted in the solution. This applies equally to those individuals making payments over the online web portal. Receipts, as reports, can contain any needed information.</i>
	Ability to track appeal activity
	<i>The solution provides the City with the ability to completely track every task or activity (and their details, outcomes, etc.) related to one or more appeals on a given case.</i>
	Mobile access to the system; drop-down menus in the forms to allow the inspector to populate the letter in the field and then office staff can print the document and ability to generate and print correction notices in the field
	<i>Letters exists as pre-configured reports that draw data from the system database. Letters, forms, citations, etc., as report templates, can be issued in the field having portable printing devices (hardware not included as part of this proposal submission). Accordingly, any data the inspector enters in the field or which already exists in the solution, may be part of a report template that can be printed in the field.</i>
	Ability to generate and print correction notices in the field
	<i>Please see the response directly above where we have indicated the ability to print in the field. (Note: Reports cannot be generated by those accessing the system through its Mobile component).</i>
	Mobile access to GIS with the ability to view activity around a physical point, i.e. determine if a building permit is issued for a nearby location
	<i>GIS functionality is available through the Mobile component of the Civic Platform enabling field staff to use GIS to complete functions such as those noted in this requirement.</i>
	Ability to track lien issuance and lien release
	<i>All aspects of lien tracking including fees and fee reductions, and their release can be configured in the solution.</i>
	Ability to track multiple violations and types to one case with different due dates
	<i>Through the system's ability to track violations individually and to have them linked or associated together under one case, this requirement is inherently satisfied.</i>

RFP Requirement Number	Requirement
3.7	<b>Code Enforcement</b>
	Ability to consolidate multiple violations into one case letter
	<i>A letter, as a report template, may contain information from the entire system database (e.g. consolidating information from multiple violations).</i>
	Maintain history of citations by property and person (owner or tenant) including case timeline (opening, closing) and case type
	<i>Since the solution provides public agencies the ability to maintain a complete and verifiable history of properties, information such as that shown, may be viewed by authorized users on an individual case basis, or compiled into a report that spans many cases and case types.</i>

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RFP Requirement Number	Requirement
3.8	Fees
	Ability to update fees as needed without significant effort, and ability to maintain more than one fee schedule at a time
	<i>System Administrators at the City will be trained on how to complete this effort exactly as indicated.</i>
	System ability to calculate the City's fees (a copy of the City's Master Fee Schedule will be attached as an exhibit to the RFP)
	<i>Accela has met the fee calculation requirements of hundreds of public agencies and we would expect to have the same outcome at this proposed implementation.</i>
	Ability to change fee collection points, change fees, add or eliminate fees, and enter new fee schedules prior to the effective date.
	<i>Authorized users can be granted the privileges to complete the listed tasks.</i>

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RFP Requirement Number	Requirement
3.9	<b>Geographic Information System (GIS)</b>
	Ability to interface with the GIS platform such that the GIS database can continue to be used in its core format, without having to upload / download and change file structures
	<i>The Accela GIS component is inherently and seamless integrated into the overall solution without the need for uploading or downloading elements or changing file structures.</i>
	Ability to view land management information from ESRI GIS
	<i>Accela GIS provides the ability to allow authorized users from the Esri GIS side to view and make use of land management information.</i>
	Ability to link to ESRI GIS from the land management system
	<i>An inherent feature of Accela GIS.</i>
	Ability to generate mailing labels based on GIS data
	<i>This functionality has been prevalent for over ten years and will allow the City to make mailing labels from any polygon geometry in its GIS system.</i>
	Ability to utilize the City's GIS data as the single data point by which all other data will be indexed
	<i>This requirement states precisely how many other Accela Civic Platform clients are employing the system.</i>

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RFP Requirement Number	Requirement
3.10	<b>Reporting</b>
	Ability to generate activity reports with various frequencies (monthly, quarterly and annual)
	<i>Reports can be prescheduled to run at any given frequency, including those noted.</i>
	Ability to generate comparative reports with the current month compared to the same month last year, and year-to-date information for the current year and previous year are typical report formats
	<i>The Civic Platform provides access to all of these standard reports and enables you to configure user access and parameters in Report Manager. Configuring standard reports involves setting up the parameters users can specify to filter the report, i.e. by date or date range, and provide the necessary report output. You can set up reports so that they automatically include the parameters, or you can require users to manually supply report parameter criteria.</i>
	Ability to generate activity reports by class code, type, contractor, project, etc. are examples of ad hoc reports
	<i>The system Ad Hoc Report Writer, an easy to use system for all users, can be employed to create the listed types of reports and more.</i>
	Ability to easily generate ad hoc reports and the ability to export data to MS Excel
	<i>Both elements of this requirement are inherent supported by the solution.</i>

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RFP Requirement Number	Requirement
3.11	<b>Additional Features and Future Considerations</b>
	Bar Code Technology - The City is interested in receiving information regarding the use of bar code technology to manage the plans submittal process
	<p><i>Documents such as reports or invoices developed in Civic Platform can use barcodes to enhance process efficiency.</i></p> <p><i>Barcodes imprinted in the reports or invoices must follow code 39. Each barcode represents some field value, for example, record ID, receipt number, or invoice number. Documents or Reports can be embedded with a hot key combination in a barcode. When users scan the barcode, the cursor automatically moves to the field indicated by the hot key setting, and the value in the barcode populates the field.</i></p> <p><i>The portlets in the Civic Platform allow users to read and retrieve system generated documents by scanning barcodes on each invoice. It is an efficient way for users to process multiple records for reports or documents.</i></p> <p><i>This enhancement provides the ability to read and retrieve a specific invoice, a record, a license, or a receipt by scanning the document or invoice number barcode, the Record ID or Alt (alternate) ID barcode, the State License# barcode, or the receipt number barcode printed on a paper with an Intermec SR30 Handheld Scanner. Additionally, users can press a hot key to move the focus to the corresponding input box on specific portlets.</i></p> <p><i>The Intermec SR30 Handheld scanner is the only scanner that Civic Platform supports for the barcode scanning feature.</i></p>
	Electronic Plan Review - The City is interested in the potential future implementation of an electronic plans review process, whereby applicants could submit plans electronically, the plans could be reviewed and marked up electronically through multiple reviewers, and plans could be easily compared side by side, all the while maintaining version control
	<p><i>As we have previously noted, the City can make immediate use of the Electronic Document Review features offered inherently by the solution. All of the noted aspects of this requirement are supported. Accela Electronic Document Review (EDR) is designed to enable review staff to incorporate document review and markup directly into the existing Civic Platform processes that automate, organize, and track reviews. This adds end-to-end management of electronic documents assuring adherence to agency policies and codes. Electronic Document Review is a fully integrated feature within the Civic Platform that leverages different technologies to the agency's choice, enabling users to review regulatory documents faster and easier.</i></p>

RFP Requirement Number	Requirement
3.11	<b>Additional Features and Future Considerations</b>
	Business Licensing - The City may wish to consider migrating from its current business license software and incorporating business license processing into the new LMS
	<i>The solution provides full features, functionality and automation related to business licensing. Accela has clients that consist of small communities using its Business Licensing component as well as entire states using the system to track, issue and reissue tens of thousands of licenses each year. Accela would be pleased to provide the City with a presentation of this component at the City's convenience. To support this requirement, we have provided information regarding our business licensing capabilities in <a href="#">Section 4.3.1</a>.</i>

RFP Requirement Number	Requirement
3.12	<b>Data Conversion</b>
	Conversion of the existing building permit data is required. The City intends to have the new system provider convert all historical data from the Accela Permits Plus system so that the data is available and fully searchable in the new system. Please note that <i>the City is requiring the new system provider to conduct all data conversion services and activities independent of City participation</i> (other than the City providing access to the SQL server). The City has approximately 17,000 building permits, plus their 48,000 attachments, residing the Accela Permits Plus 600MB SQL database. Vendors should provide a description of its data conversion plan and fixed cost to convert and validate the existing data
	<i>Accela has performed data conversion of a myriad of systems as part of every Accela Civic Platform implementation. We have dedicated teams of specialists and possess proven techniques in such activities. We direct the reader to <a href="#">Section 5.8</a> of this proposal that provides an in-depth discussion of our data conversion methodology.</i>

RFP Requirement Number	Requirement
3.13	<b>System Interfaces</b> <b>Provide the ability to integrate the permitting application with the following systems in use:</b>
	Microsoft Suite of Products
	<i>Inherently provided by the Civic Platform.</i>
	GIS - ESRI
	<i>Inherently provided by the Civic Platform and its GIS component.</i>
	Business License – HdL
	<i>If the City does not ultimately include the business licensing component of the Civic Platform into the proposed implementation, Accela has the ability to develop an interface to the City’s HdL business licensing system.</i>
	ERP Financial Application – Tyler MUNIS
	<i>Accela can develop an interface to enable the needed intercommunication between both systems as part of its implementation activities. No provisions for such integration is included in our proposed scope of services and pricing.</i>

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## 4.3 Additional Modules

*4.3 - Identify any additional proposed modules or services that were not identified in Section 3, and provide a description of the features and functions of each proposed module.*



### Licensing and Case Management

#### Accela's Licensing & Case Management Vertical Markets

Agriculture

Alcohol & Tobacco

Business Licensing

Education

Environmental

Financial & Banking

Health Professions & Facilities

Occupational and Trade

Professional Licensing

Recreation: Hunting and Fishing

Social Services

Weights and Measures

### 4.3.1 Licensing and Case Management

#### Automate licensing to a new level

Accela's Licensing and Case Management is a fully integrated solution to track and manage regulatory processes associated with licensing, registration, inspection, investigations, complaint handling, hearings and legal action allowing you to deliver outstanding customer service to licensed professionals and business entities. Should the City decide to migrate from its current business license software, Accela's Licensing and Case Management solutions offer the highest level of configurability and flexibility to meet best practice and unique government licensing requirements, whilst integrating seamlessly with the proposed Land Management solution.

Licensing and Case Management creates an enterprise platform that promotes:

- ➔ **Flexibility and versatility** in licensing, registration, and case management via the Licensing and Case Management platform. This comprehensive business intelligence solution automates government operations while facilitating timely and proactive activity management.
- ➔ **Self-service**, using Citizen Portal, our public facing web portal, and our interactive voice response technology (Accela IVR). These technologies substantially reduce the need for counter operations and provide 24 hour online and telephone access to government operations.
- ➔ **Visualization of information** with Accela's award-winning Esri ArcGIS integration that provides access to geographic representation of licensing information and other vital data both in the office and the field.
- ➔ **Mobility** via Accela Mobile and our productivity apps Analytics, Inspector, Code Officer, and Contractor Central, which enhance accessibility for field staff and community users by extending back office and public self-service options to the field – with or without an active connection back to the office.

### 4.3.2 Licensing and Case Management Functions

As a COTS (Commercial-Off-the-Shelf) solution that is part of our Civic Platform, our Licensing and Case Management solution provides an extensive array of functions to handle professional and business license processing through the early stages of pre-application and initiation through renewal, allowing the

To watch how citizens can use Accela solutions to easily apply, renew and pay for their licenses online, visit <http://bit.ly/1EaY60u>

City to quickly and efficiently process and maintain any of its current 3,400 business licenses. The solution incorporates all interim and other activities. For more details, visit <http://www.accela.com/solutions/licensing>

- ➔ Alerts and Holds
- ➔ Audits
- ➔ Contact and Entity management
- ➔ Continuing Education management
- ➔ Document handling
- ➔ Education Tracking
- ➔ Examination tracking
- ➔ Fee management
- ➔ Hearings
- ➔ Inspections/Investigations
- ➔ Performance metrics
- ➔ Privileges, specialties, amendments
- ➔ Renewal processing
- ➔ Reporting
- ➔ Scheduling
- ➔ Workflow

As a fully web-based and web-accessed solution, Accela Licensing and Case Management is accessible anywhere/anytime in that it only requires a standard web browser. No longer confined by access channels, the solution can integrate separate agency locations, external agencies, and other parties that may need input to the solution. It is no longer necessary to update software on every end user's workstation or PC. These advantages in accessibility and updates amount to monetary gains by substantially reducing client support costs.

Accela's Civic Platform provides a fully integrated solution for licensing and case management. Any application type (e.g., license, inspection, enforcement, and more) can be configured to meet your agency's strictest needs by configuring the solution tools to meet each of the sub-processes and business rules governing each case type. Our Civic Platform provides a single source solution for all data as well as history for all in-progress, processed, or completed cases and transactions.

#### 4.3.2.1 License Application

Accela's Civic Platform provides the highest level of configurability within the industry. This COTS solution allows public agencies of all sizes both flexibility and surety by meeting current internal needs, while also allowing for growth and adaptability to ongoing regulatory and legal changes. New agencies, departments or license types can be added to the solution without affecting the current configuration. The overpowering goal behind this software interface is to assist all users from those who initiate the application process to those involved with other workflow-related tasks or activities. The Civic Platform can initiate licenses, renewals, inspections, complaints, and enforcement processes. These applications and case types can be applicant, field staff, end user and citizen- or applicant-initiated through various on-line and non-computer methods. Once

See how the New York Agency License Center's embedded business wizard navigates applicants through the site to locate all necessary forms and information they need at [www.vimeo.com/89786837](http://www.vimeo.com/89786837)

input into the solution is complete, the solution configuration will engage automation and fully account for all needed processing, reviews, hearings, inspections, etc. governing the specific case type. License applicants are subject to the same application functionality and restrictions regardless of the application channel (POS, back office, phone, online). Applicants have the ability to attach any type of electronically formatted document with their initial application or at any time during the application process. The agency can specify what file type and size they will accept through the application.

#### **4.3.2.2 Data Capture Capabilities**

The Civic Platform includes all fields necessary to capture entity data as well as general information such as address and contact information. Once data is entered into the reference tables, the information can auto-populate without having to reenter it for future applications. This feature helps maintain data integrity by reducing the likelihood of data entry errors and increases staff efficiency. The solution can also eliminate duplicate records by merging them when discovered. In addition, entities have the ability to specify their preferred method of communication (e.g., email, fax, mailing address, phone number) for each communication type (e.g., legal, compliance, licensing) across license types.

Upon application or other case submissions, the solution will automatically assign a unique ID (or allow manual assignment) that will permanently remain with the application/case. This license or case ID is searchable by any field or combination of fields. All entities also maintain a unique identifier. Entities can be linked to one or many licenses, permits, cases or records. The solution supports parent/child relationships for sub-licenses or cases and the attachment or linkage of other case types that have some user-determinable association with the primary license/case. Through this linking feature, the solution integrates all related data in accordance with any business aspect (geography, address, applicant, facility use, other).

Through our solution the agency can create, input, track, automate, and report on all data entered into the solution database. Data can also be utilized through interfaces created to external third-party systems. End users can create unlimited data fields to accommodate needs related to application and licensing data in relation to all regulated entities. Specifically, these fields can be uniquely applied to the applicable program or application level as governed by agency business rules. Data fields can exist in a wide variety of forms. These include simple text fields specific to a particular case type with options to set the type of data or value that can be entered (numerical, text, drop down, pick list, etc.) to assist with data accuracy and consistency. These include specification of the preferred method of communication desired by the applicant and applicable for each communication type.

### 4.3.2.3 Renewals

We understand that the regulatory licensing process does not stop at a license approval stage. Our Civic Platform provides all features necessary to handle the renewal processing including collection of fees, supporting documentation and required qualifications (examinations, training, etc.). For each renewal period, the solution offers the ability to utilize a new workflow set for capturing records associated with all tasks, approvals, assignments, successful examination results, or deficiencies.

Through the configuration process, license renewals within the Licensing and Case Management solution can be fully automated. This can be done by batching renewals when they come due, sending email notifications in advance of license expirations, using email and letter reminders, facilitating online payment submissions through the web portal, importing exam results from third parties, etc., or automated to the extent necessary/prescribed. Every aspect of the agency licensing renewal activities can be controlled, configured and re-configured by agency staff. Configuration can be done at any point when any aspect of the renewal process is changed or modified. Licensees can receive specific logon IDs and create their own passwords, allowing them entry to the renewal process within Citizen Portal. Applicants can also designate their preferred method of contact.

This process extends to public users through online access. Public users can initiate and complete their license renewal online as well as pay any fees associated with the renewal through this web portal. This entire process can occur within the agency, online, or a combination of both. For example, a public user can start their license renewal process by completing an application online. Then, they may visit the agency to provide supporting documents, pay the fees, and complete the transaction. Conversely, a customer can visit the agency to start the renewal process, and then opt to complete the transaction online.

Many times licenses require continuing education or passage of an examination to keep the license current. The Education, Continuing Education, and Examination components of the Civic Platform can also be implemented with the license renewal process to ensure all requirements are met prior to license issuance or renewal.


In terms of processing renewals, licensees have the same mechanisms available to them as those for Application Intake. Again, they can be completed online (through Citizen Portal), by mail, via fax (where payments are not required), or in person. Licensees can update information during the renewal stage. Once submitted, staff can associate the specific documents to the respective license. These electronic documents remain in the solution's repository or in an interfaced Electronic Document Management System. Security configuration options limit who can access the native format of these documents. "Checklists" are available for configuration within the workflow subtasks. The web portal

offers the licensee various information including requirements for renewals, continuing education sources, requirements specific to their license type, and information regarding privacy concerns. Where there is a need to change existing license information, the web portal can be configured to allow for these changes by the licensee.

**License Renewal Notice**

City of Bridgeview  
100 Main St. Bridgeview AZ 86004  
925-659-3200

Sample Renewal Notice



READ ALL OF THE FOLLOWING INFORMATION  
FAILURE TO ACCURATELY COMPLETE YOUR RENEWAL APPLICATION WILL DELAY PROCESSING

Your current license will expire on 07/08/2011. If your license is not renewed, it will be considered void and may be reinstated only upon application for reinstatement and payment of the appropriate license fee. If the license is not renewed within 1 year after the license is voided the licensee will be subject to reexamination for the license.

You may expedite processing by renewing online at [https://aca.accela.com/aca\\_demo](https://aca.accela.com/aca_demo)

YOUR LICENSE WILL NOT BE ISSUED UNTIL ALL FEES ARE PAID

**Contact Information Changes**  
If your address, contact phone number, or email has changed, please enter the information below or update your account information online.

**Applicant Signature**  
If completing the renewal application using this form, the Applicant must complete the information below, as applicable, and sign the renewal application. Failure to sign the application will delay processing the renewal application and may impact the ability of the licensee to obtain permits.

**Payment**  
If completing the renewal application using this form you make your checks, cashier checks, or money orders payable to The **City of Bridgeview**. Mail the completed application below, with full payment, in the enclosed envelop.

Questions regarding your renewal application may be directed to the License Division at 925-659-3200.

RETAIN THE TOP COPY FOR YOUR RECORDS.

---

June 27, 2011

City of Bridgeview  
100 Main St. Bridgeview AZ 86004  
925-659-3200

Your current license expires on 07/08/2011.

RENEWAL FEE	DUE DATE
\$ 52.00	07/08/2011

02 4201 00111C-00000-00090 001116

**RENEWAL APPLICATION**

CHANGE OF ADDRESS, PHONE NUMBER, OR EMAIL	
ADDRESS	COUNTY
CITY/STATE	ZIP CODE

**Exhibit 45: License Renewal Notice**

Acceptable payments for renewals include credit cards, debit cards, or e-checks. Configuration also allows for partial or full payments as governed by an agency's business rules. For pro-rata licenses, the Business Rules Engine can be configured to indicate the exact amount of the license renewal fee based on time and other factors. All accepted payment transactions provide the licensee with a receipt. Citizen Portal provides a secure payment engine (PCI-DSS certified), and the solution does not store payment source information.



Following an application renewal, the applicant can view all steps/activities undertaken by the agency to ensure successful renewal of the license. Should the license application be incomplete at the time of submittal the solution can be configured to notify the applicant of further information/documents required via status or disposition on the renewal task and/or by email notification (either manually or automatically). The renewal application also allows for designated mandated fields, whereby any incomplete/undesigned information within these fields will prevent the applicant from moving forward to the next submittal screen until information is complete. Using the web portal, any e-check submittals with insufficient funds (NSF) can activate payment failure notifications for both the back office user and the licensee. This task will then remain open until payment, along with any applicable penalties, are submitted. Staff can configure any fees, penalties or other charges for services that uniquely and specifically align to a given license type.

Configuration allows for renewal information, such as grace period expiration method, penalty period, and renewal fee codes. The solution provides all necessary functions and features for renewal handling including. This might include continuing education tracking for approved providers and their courses, or designating the specific number of hours required for a specific period.

Renewal notification can be configured within the Business Rules Engine to automatically notify licensees of upcoming key license expiration dates. As in the case of the initial application, a solution wizard exists on the web portal to assist end users in need of such automated assistance. Business rules will govern for any expiring license, but third party reporting engines can identify expired licenses allowing for appropriate business actions.

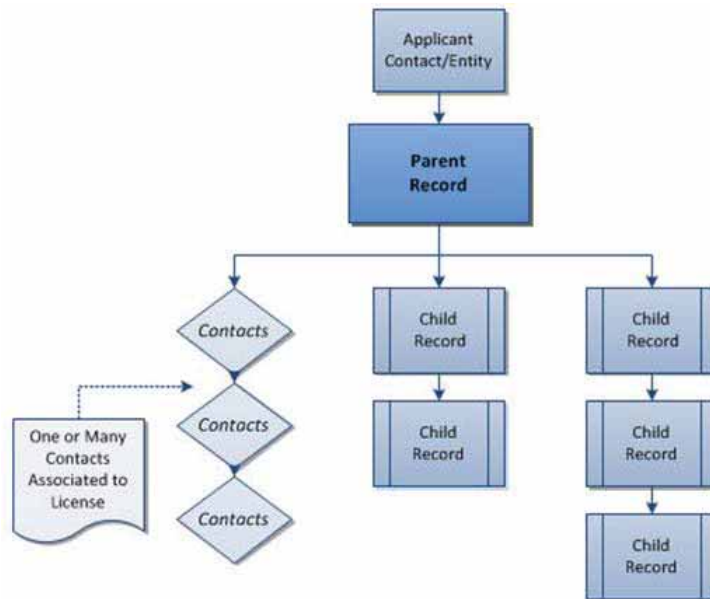
#### **4.3.2.4 Parent/Child Relationships**

The Civic Platform provides functionality to link licenses, brands, and other case types to one another. Licenses and other case types (entities, enforcement actions, investigations, complaints, etc.) can be linked to one another so access to any one of the records automatically enables access to all linked records. There are no limits on how many case types can be associated to one another. This attachment is governed by the agency's business rules. The solution also provides the capability to establish a primary record, with all attachments linked as secondary records.

The solution also allows for "parent" records, from which "child" records can be created. Configuration abilities of the solution abound to enjoin related or child records to fulfill the inter-relationship needed by our clients.



**Exhibit 46: Tiered Parent Child Relationships**



**Exhibit 47: Relationship of Entities to Licenses: Child records can be renewals, amendments, complaints, investigation cases, or other subordinate licenses**

#### 4.3.2.5 Fee Schedules

Our Civic Platform configuration allows customization for fee schedules for all case types (licenses, certifications, inspections, enforcement, etc.). The solution simply requires a fee based on any valid arithmetic calculation. For instance, fees can be flat or calculated around factors such as solution data.

Our Civic Platform’s fee and cashing element allows users to configure the needed assessment of fees at the time of assessment/collection. All fees and

cashiering operations fall under the solution audit trail providing users with trusted accounting for all financial transactions. The same is also true where system administrators have adjusted/changed fees for business purposes.

In person or mail in transactions will still make cash or check payments possible. Credit card transactions are accepted using the agency’s web portal, which provides the capability to make online credit/debit card payments 24/7 via any standard web browser. PayPal is the standard for credit card processing. Our customers have the option of using other merchant account vendors for which Accela would provide existing web services for integration. We have completed an assessment for PCI-DSS and PABP certification, and all credit card transactions are completed in compliance with these standards.

**RECEIPT**

City of Bridgeview  
 CITY OF BRIDGEVIEW  
 1 FRANK H OGAWA PLAZA  
 Bridgeview, AZ 86001  
 1 Frank H. Ogawa Plaza Oakland, CA 94612 Phone: (510) 444-CITY

**Application:** 07LIC-00000-00018  
**Application Type:** Licenses/Business License/Sidewalk Cafe/NA  
**Address:** 3320 N KING, SUNRISE, AZ 86004

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<b>Receipt No.</b>	1488
<b>Payment Method</b>	<b>Ref Number</b> <b>Amount Paid</b> <b>Payment Date</b> <b>Received</b> <b>Comments</b>
Cash	\$900.00            07/18/2007

**Owner Info.:**    LUTHER DONALD & ZAIDA JT  
 3320 N KING ST  
 SUNRISE, AZ 86004

**Work Description:**    NEW SIDEWALK CAFE - POSTER'S CAFE

**Exhibit 48: Receipt**

Administrators can quickly define fee schedules with fee formulae by linear equation, subtotal, and project valuation. End users can assess, invoice, and receive payment for each application partially or in full. The solution provides payment review and a transaction audit trail. They must first pre-define fee items, fee schedules, and payment periods—the core components to fee setup. Once they are established, users can enhance fee setup by incorporating business rules and apply them to record types for implementation.

Fees are organized by a fee schedule made up of individual fee items. Each application type is assigned a fee schedule. This allows availability of associated fee items after the application is submitted to the agency for assessment

purposes. Users can configure to have more than one fee schedule assigned to each application type. If an agency implements fee estimation, partially completed applications will display applicable fee items to a customer before submission to the agency. Fees can be assessed to incorporate any modifications before billing. Billing schedules for fee items can be controlled by administration or and agency employees. This would create an automated invoice, billed to the customer, either upon application submission or upon completion of the task (i.e., an inspection).

When a payment is received, the monies are allocated to the fee items with the highest priority first. For fee items where this is not configured, the payment is distributed equally towards the un-prioritized fee items that have been billed to the customer. An agency can charge a simple fee or create more complex fees incorporating application information and fee calculations. Users can create simple fees, point of sale fees, and complex fees with calculations.

The Civic Platform also supports drawdown accounts or trust accounts. The payee can use any remaining balance on these accounts to pay for any outstanding fees. The solution can also be configured to alert the customer or other agency staff when a minimum balance has been reached so that appropriate follow-up actions can take place.

#### **4.3.2.6 Compliance Enforcement**

Enforcement activity is a major responsibility entrusted to public agencies for safeguarding the health and safety of public citizens. Accela is at the forefront of software solutions enabling public agencies to automate their enforcement procedures related to complaint management, conducting inspections and investigations, issuing field notices and citations, holding hearings related to the abatement of regulatory non-compliance conditions and managing disciplinary actions. Accela's Civic Platform serves hundreds of public agencies. The solution improves their ability to manage formalized procedures and improves efficiency via automated process standardization.

Enforcement tracking can be an activity tied to any relevant application, license or other case type. The solution provides the flexibility to accept and maintain all compliance and enforcement data. It can track enforcement related to a specific complaint, violation or other, or simply be its own process without being dependent on a specific case type.

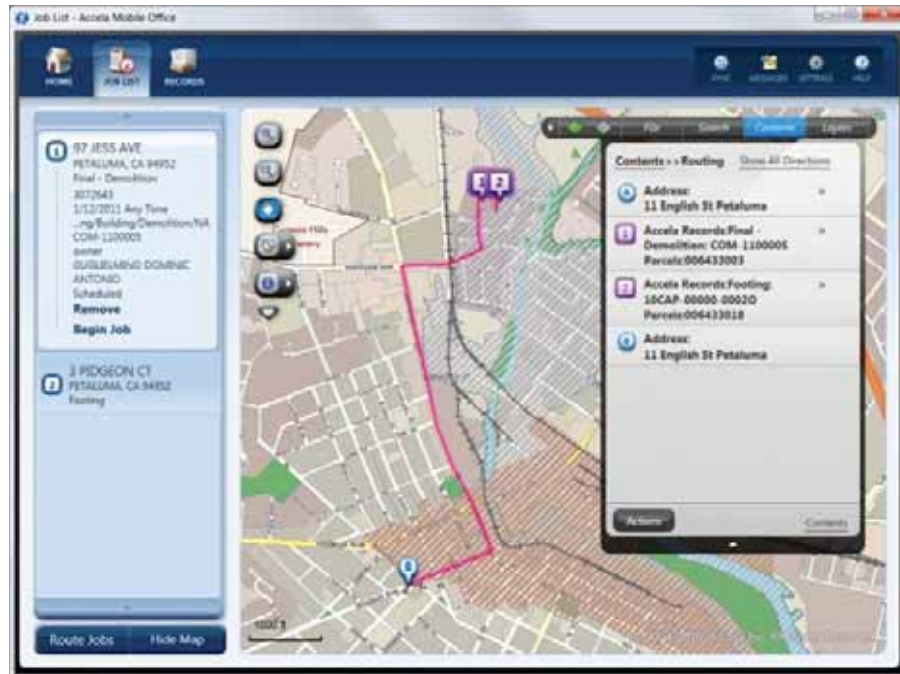
If enforcement activities are configured to exist as individual case types, as with other Civic Platform case types, they may have their own unique enforcement-pertinent, system-generated ID number and as necessary be associated with other sub-cases or "child cases" as governed by business rules. Users may associate enforcement cases, like other solution cases, with licenses, facilities, etc., or simply have them exist as the extension of those case types in the solution workflow. Third party reporting software can generate letters and other solution output.

Workflow allows users to manage enforcement cases and track them with assignments of tasks through individual users or groups. Workflow can be configured as a simple process (i.e., unsubstantiated complaint) or as a complex criminal investigation. Workflow can contain tiered levels to show tasks and subtasks for processes or groups. As a case may work through the tasks of the Investigative Unit, it may be sent to the Adjudication Unit that has a separate set of tasks to complete. Tasks can loop back to other stages, groups and tasks as needed.

All enforcement cases can be linked in relationships to other cases – such as several complaints to one investigation, or to licenses. Conditions or alerts set on both contacts or licenses based on enforcement actions can alert staff to requirements needed, holds, or necessary actions. Based on the condition sent, messages can be sent to investigative or supervisory staff based on the action in a field – such as if action is taken on a license, like a re-association.

In the field, Accela Mobile provides an extensive array of functionality to the field staff user in his/her investigation, providing the opportunity to capture all data, issue violations (through interfaced field printers), and send data to the central server in real-time (connectivity dependent). Inspection assignments can be pre-established by staff specialty, geography or other factors and changes to these preset assignments can be accomplished by authorized end users as mandated by inspector schedules, jurisdiction or regulated entities.

Where the need exists for violators and others needing to submit information and/or documents to the agency, this is accomplished using Citizen Portal. It is through this web portal that all external users can be granted the access to view relevant information regarding enforcement cases and have access to view the entire history of all enforcement activities on a real-time basis (connectivity dependent), including any hearing results, license suspensions, penalties including fines, and sanctions.



**Exhibit 49: Users can prioritize enforcement activities, engaging the “fast track” process upon selection.**

Calculation of fees for any type of service or assessment is a fundamental feature in the Civic Platform. This includes fees applicable to any type of citation or other similar notice or instrument of service in the field. Using portable printers, allows a user to print citations and other notices in the field (capturing signatures of appropriate licensees or others) and immediate delivery to licensees or other on-site representatives.

#### **4.3.2.7 Inspections**

The Civic Platform can accommodate inspection requests of any type. Configuration allows for inspection availability to account for inspector or field staff schedules as well as for operational schedules that exist as to when inspections can take place (e.g., weekdays only, weekdays and Saturdays, no inspections on national holidays, etc.). The agency’s business rules may determine when and who can complete inspections. There is also the option for an associated timeline for completion. Agency specifications can also be accommodated within the calendar. An optional inspection routing optimization program can create travel-effective routes for inspectors on a daily basis.

Accela Mobile brings the office to the field, giving field staff direct, real-time access to license data via mobile devices. Specifically, field personnel can add, modify, and comment on data records from remote locations easily and efficiently. Onsite printing and assignment of proper personal maximizes time

and money for the agency. The solution allows for reassignment of field personal where desired.

Digital photography can be used to record evidence in a meaningful way, as opposed to simply entering test script into comment fields. Such entries, both as digital script and graphic portrayals, lend immense utility to hearings and other meetings in which evaluations of the specific complaint or violation is being evaluated before boards, commissions, panels, etc.

Inspections can be assigned and determined by many different factors, including inspection districts or territories, and inspector expertise or specialty. The solution can be configured to allow a pre-determined number of inspections to occur on an inspector-by-inspector basis, as well configured to establish the allocated time per inspection type. Using these allocations, the solution can help optimize inspector scheduling and prevent over-allocation of inspection appointments. Inspectors do not need to come into their offices to receive run lists since they can be accessed from the web or from their web-enabled field devices.

In the case where inspections are part of a larger formalized field process, inspection results can be configured as workflow tasks so that information regarding when the inspection was conducted, by whom and with what results can be recorded in the solution. The solution will record the inspection and follow the configured inspection order so that no inspection can take place out of sequence until the previously configured inspection was successfully completed.

Inspection results form part of the solution audit trail and accordingly once an inspection result and commentary has been saved to the database, any changes or modifications made will be reflected as part of the audit trail data.

Number: 12BRN-00000-00064

A notice was added to this record on 2012-07-08.  
 Condition: Severity: Notice  
 Total conditions: 1 (Notice: 1)

[View notice](#)

Menu | New | Modify Tasks (Supervisor) | Reactivate Parallel Tasks | Help

Go To | Summary | Workflow | Inspections (4) | Application Information | CONSTRUCTION DOCUMENTS | Information Tables (0)

**Workflow Tasks**

- Application Acceptance
  - Accepted
- Fire Review
- Land Use Review
- Environmental Health Review
- Building and Safety
  - Approved With Conditions
- Mechanical Review
  - Approved
- PW Engineering Review
  - Approved
- Traffic Engineering Review
  - Approved
- Permit Issuance
  - Issued
- Inspection
- Certificate of Occupancy
  - Released
  - Released
  - Released
- Closure

There currently are no ad hoc tasks defined.

Task	Status	Date	Staff
Application Acc...	Accepted	07/08/2012	Bao Adams
Fire Review	Pending		
Land Use Review	Pending		
Environmental H...			
Building and Sa...	Approved With Conditions	07/08/2012	Ike Moore
Mechanical Review	Approved	07/08/2012	Bao Adams
PW Engineering ...	Approved	07/08/2012	Bao Adams
Traffic Enginee...	Approved	07/08/2012	Bao Adams
Permit Issuance	Issued	07/09/2012	Bao Adams
Inspection	Pending		
Certificate of ...	Released	07/09/2012	Bao Adams
Closure	Pending		

**Exhibit 50: Workflows can be simple or complex with one or many sub steps tracking the Case from Complaint Intake through Investigation, Adjudication, Final Disposition.**

Accela’s Licensing and Case Management solution provides users the ability to track time, mileage and costs associated with all cases as a case goes through the workflow process from inception as a complaint. For each individual step, the start time, end time and total time can be calculated. Costs can be calculated based on the total time or other solution values and emitted as reports or invoices.



Number: 12ERN-00000-00064

A notice was added to this record on 2012/07/08.  
 Condition: Severity: Notice  
 Total conditions: 1 (Notice: 1)  
[View notice](#)

Menu | Submit | Calculate Total Time | Cancel | Help

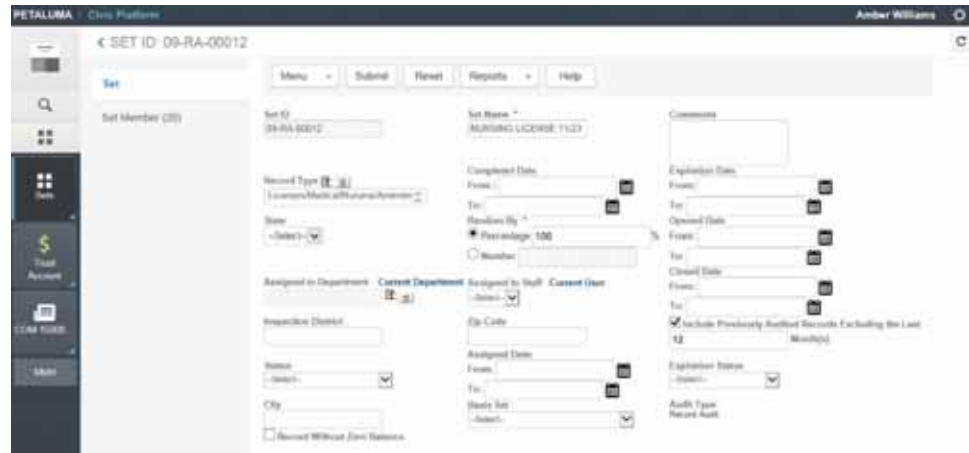
Go To | Workflow History Audit Trail (9)

Task	Status	Action by Department	Current Department	Action By	Current User
Building and Safety	Approved With Conditions	Building Department		Ike Moore	
Assigned Date	Due Date	Assigned to Department		Assigned to	
07/08/2012	07/13/2012	Planning Department			
Comments	Status Date	Start Time	End Time	Hours Spent	
<a href="#">Standard Comment</a>	07/08/2012	2 : 00	3 : 10	1.10	
The initial examination of the Pre-Submission Application and supporting documents is complete. The packet has been submitted to Planning Department for staff review. Please monitor the process by logging onto our new Citizen Access web site at <a href="http://aca.accela.com/ACA_DEMO">http://aca.accela.com/ACA_DEMO</a>					
<a href="#">check spelling</a>	<input type="checkbox"/> Billable	<input type="checkbox"/> Overtime	Time Tracking Start Date	Est. Completion Date	In Possession Time (hrs)
<input checked="" type="checkbox"/> Display Comment in ACA					

**Exhibit 51: Workflow History Audit Trail**

### 4.3.2.8 Audit Sampling

Accela’s Licensing and Case Management solution provides a random audit feature for numerous functions, including selection of licensees for continuing education audits, selection of sites for random inspections, and more. This will allow the agency to select specific criteria such as license type, status, or area and pull a random number or percentage of records into a set. This set can then be merged into a letter template if required. A record of the selection for an audit will be documented so that users will have the ability to choose whether licensees are included in the next audit.



**Exhibit 52: License Random Audit**

Citizen Portal provides a full solution to this process by adding the ability for licensees to go to the site and upload documents to their record via the Internet, rather than having to mail them in and have staff send time matching information and scanning documents.

The audit group is randomly selected based on specific parameters defined by the user. Once the set is generated, users can filter the set, run a report, execute a business rule, and otherwise audit the set. For example, a user may want to audit 20 professional engineer licenses. Once the user defines the set parameters, the audit set is generated creating a list of 20 randomly selected professional engineer licenses that fall within the set parameters. An automated rule could then be executed to contact the licensees notifying them that they are being audited, or automatically create mailing labels to send hard copies. This could then generate a report to audit fees and continuing education requirements. System administrators determine how frequently a record or percentage of records can be audited at the record type or agency level, and also determine the maximum number of records each audit can return. The solution determines audit frequency by providing values associated with random audits. This prevents the likelihood of high frequency audits.

Number: 12BRN-00000-00064

**i** A notice was added to this record on 2012-07-08.  
 Condition: Severity: Notice  
 Total conditions: 1 (Notice: 1)  
[View notice](#)

Menu Remove Help

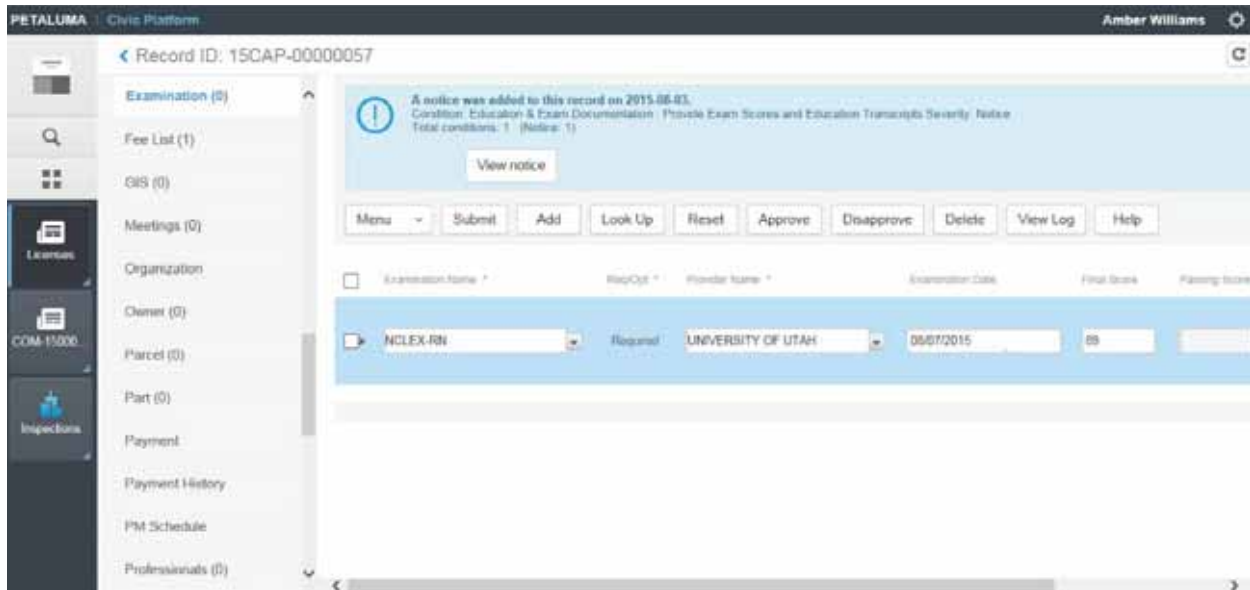
Go To Summary Workflow Inspections (4) Application Information CONSTRUCTION DOCUMENTS Information Tables (0)

Date	Task	Status	Audit Trail	Action By
07/08/2012	<a href="#">Application Acceptance</a>	Accepted	07/08/2012 06:31:55	Bao Adams
07/08/2012	<a href="#">Building and Safety</a>	Approved With Conditions	07/08/2012 06:32:32	Ike Moore
07/08/2012	<a href="#">PW Engineering Review</a>	Approved	07/08/2012 06:35:05	Bao Adams
07/08/2012	<a href="#">Mechanical Review</a>	Approved	07/08/2012 06:35:16	Bao Adams
07/08/2012	<a href="#">Traffic Engineering Review</a>	Approved	07/08/2012 06:35:24	Bao Adams
07/08/2012	<a href="#">Certificate of Occupancy</a>	Released	07/08/2012 09:29:22	Greg Mietelski
07/08/2012	<a href="#">Certificate of Occupancy</a>	Released	07/08/2012 09:35:35	Bao Adams
07/09/2012	<a href="#">Permit Issuance</a>	Issued	07/09/2012 11:27:32	Bao Adams
07/09/2012	<a href="#">Certificate of Occupancy</a>	Released	07/09/2012 12:48:09	Bao Adams

**Exhibit 53: License Notice**

### 4.3.2.9 Exam Administration

Licensing and Case Management allows users to track all providers for Education, Continuing Education, and Examinations for agency monitored licensees providers offering professional educational degrees, continuing education, or certification examinations take many forms, including accredited colleges, universities, and trade schools; professional development conferences and workshops; trade journals and other publications; or agency and local agencies. As providers are added to the database, it will provide ease and continuity for data entry and more precise/accurate reporting.



**Exhibit 54: License Exam**

The Civic Platform uses workflow tasks to track the successful completion of Examination requirements so that the professional license application or renewal process can proceed to the next task. The workflow process assigned to the Application Type is defined when the Application Type is created; however, it must also be assigned to the examination process through the Record Setting tab of the Examination Maintenance screen.

### 4.3.3 CivicData

CivicData is a free cloud-based open data platform that makes it easier for government agencies to publish and manage datasets. When forward-thinking municipalities join the Civic Platform, they automatically enjoy free publishing of their community data in real time to the industry leading [Civic Data](http://www.civicdata.com/) platform.

Built on open source technology using CKAN, CivicData makes it easy for developers to create and deploy innovative apps with cross-jurisdiction datasets. The civic apps created by this growing ecosystem can be used by multiple agencies, thereby helping civic developers to build and scale their businesses. The platform will unlock the value of open data while helping agencies move from transparency to trust as they offer citizens, businesses and professionals access to civic information that was historically hard to find. Visit <http://www.civicdata.com/> for more details.

“One of the things we’re doing to fuel more private sector innovation and discovery is to make vast amounts of America’s data open and easy to access for the first time in history. We’re making it easier for people to find the data and use it, so entrepreneurs can build products and services we haven’t even imagined yet.”

*President Obama  
Open Government  
Initiative  
<http://www.data.gov/>*

“In 2009 Salt Lake City began its Open Government Initiative. Working to fulfill this commitment, Salt Lake City partnered with Accela, whose free CivicData service hosts our data in a space that enables the citizen developer to create applications, alleviates a burden on IT departments and provides tools that the City may not have considered.” ”

*Salt Lake City, Utah  
<http://www.data.gov/>*

## Why Open Data?

Open data is shareable data that permits use and redistribution by anyone for commercial or non-commercial purposes. Government agencies are tremendous repositories of data that is collected to perform their primary functions. Most government data is public by law and therefore could be made freely accessible to drive innovation and value both within government and for public benefit. Worldwide, open data has been employed to drive transparency, empower citizenship, propel innovation of new products and improve efficiency of government services.

For example, is it possible to condition the denial of a permit from government agency on whether a person has an outstanding tax liability, an outstanding parking ticket, a violation against a property they own, or an outstanding utility bill? Doing so requires querying data sets that fall under the purview of an array of different departments and agencies across the government footprint. It also requires the development of systems that integrate all this data and allow it to be used as part of a well-defined process.

Open data programs can help make this kind of integration possible. Open data make data discoverable – it removes the need for special relationships or political clout to obtain data. Anyone and everyone can see what data is available for use, so few resources are spent hunting around for data and connecting with data owners.

## Benefits of CivicData

Accela CivicData offers a wide spectrum of benefits so that government departments can:

- ➔ **Respond to Open Data requests through FOIA** (Freedom of Information Act) in a timely and cost efficient manner.
- ➔ **Share your success with citizens.** Government staff can easily share information with business and citizens online with a one-time release of dataset.
- ➔ **Extract, visualize, summarize and compare business results within a single click.** CivicData offers a complete toolkit to filter, compare and view your data in different ways including grid, graph and map view.
- ➔ **Publish your data on a single-site regardless of agency size.** CivicData provide real-time visualization of datasets across multiple jurisdiction, allowing the public to browse not only relevant information in their own community, but also benchmark with neighboring municipalities.



**Exhibit 55: Tampa, FL Citizen Portal and Open Data, real-time metrics - Read more at <http://bit.ly/1Y8XzGz>.**



**Exhibit 56: Deschutes County, OR Permits Dashboard - Use the links on the left side of the page to navigate between some other options including some amazing GIS map dashboards.**

### 4.3.4 More Apps Built on the Civic Platform

#### 4.3.4.1 CityGovApp

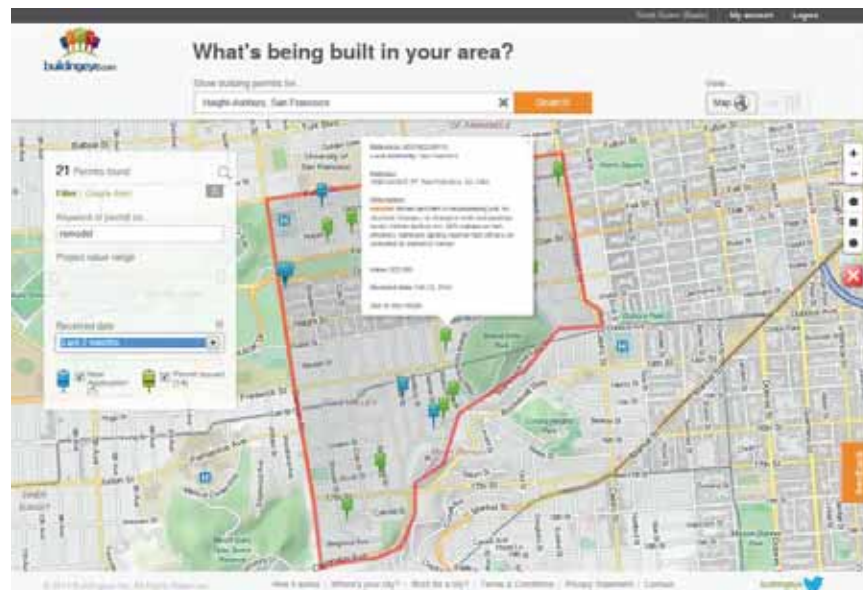
[CityGovApp](#) offers Civic Platform Extension Mobile Apps for government made easy for internal productivity and citizen engagement. They provide these apps on a subscription bases, avoiding all upfront costs while providing ongoing support and maintenance. With over 40 apps built to extend the Civic Platform, they have the largest [library](#) of extension solutions from one vendor. We have many happy customers who use CityGovApp solutions, including Westminster, CO, El Paso, TX, County of San Diego, CA, and the State of Oregon.



**Exhibit 57: CityGovApp Plan Review Analytics Dashboard provides clickable charts and graphs to drill into data. They can also be printed, exported or data can be downloaded for external use.**

#### 4.3.4.2 Building Eye

[Building Eye](#) provides a modern, responsive web solution fully integrated with the Civic Platform for citizens and staff to visualize Planning Applications, Building Permits, Code Enforcement, Capital Projects and more. Access information (updated daily) from your desktop, tablet or mobile device. We have a number of customers currently implementing this solution, including the City of San Francisco and Corvallis, OR.



#### 4.3.4.3 Open Counter

[Open Counter](#) provides a modern, responsive web solution fully integrated with the Civic Platform that helps cities support local economic development with a “one-stop-shop” for starting a business, helping cities become truly “business friendly”. We have a number of customers currently implementing this solution, including Palo Alto, CA and Boston, MA.

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**OpenCounter**  
Start your business in Santa Cruz, California

START IDEA TEAM LOCATION SUMMARY

### Location

Where would you like to locate?

Legend: Permitted Administrative Use Permit Special Use Permit

Where you end up setting up shop will have major implications on the complexity of permits and licenses required by the City.

Your planned address\*

\* required field

← back save & continue →

### Hot Dog Express

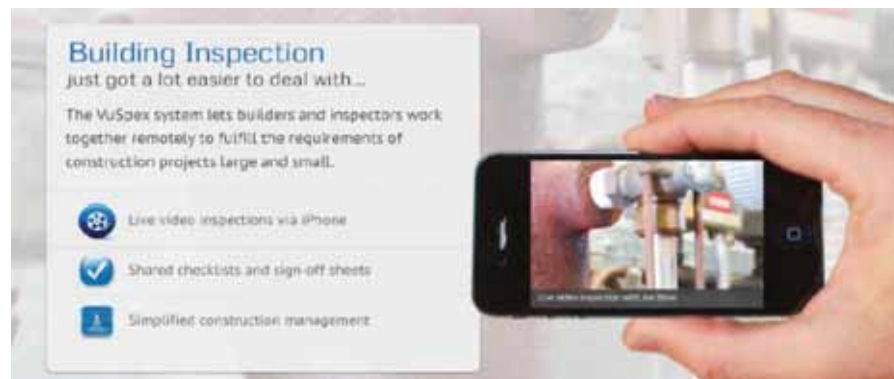
Restaurant

Permits

Business License	\$145.15
Home Occupation Permit	\$221.00
Retailer's Permit	\$0.00
<b>Estimated Total:</b>	<b>\$366.15</b>

#### 4.3.4.4 VuSpex

[VuSpex](#) offers an innovative video inspection solution fully integrated with the Civic Platform, which includes a responsive web app for the inspector and a native smart phone app for the contractor. VuSpex Mobile Video Inspections transforms the inspection process by connecting the onsite Contractor's mobile device to the Inspector's web based application. VuSpex reduces cost for Contractors and Inspectors. Fewer delays gets the job done faster, saving time and money for everyone. We have a number of customers interested in embracing this revolutionary solution, with the first, Alameda, CA, in active testing.



### 4.3.4.5 Civic Insight

[Civic Insight](#) offers a solution fully integrated with the Civic Platform, providing a modern map based solution with simple, clear language and visualizations that help residents make sense of complicated processes like code enforcement and building permits. With fewer questions from residents, agency staff have more time to focus on their work while users can receive alerts and analyze trends across the community. We have over ten Civic Platform customers who have this solution integrated, including Palo Alto, CA and Sacramento, CA.

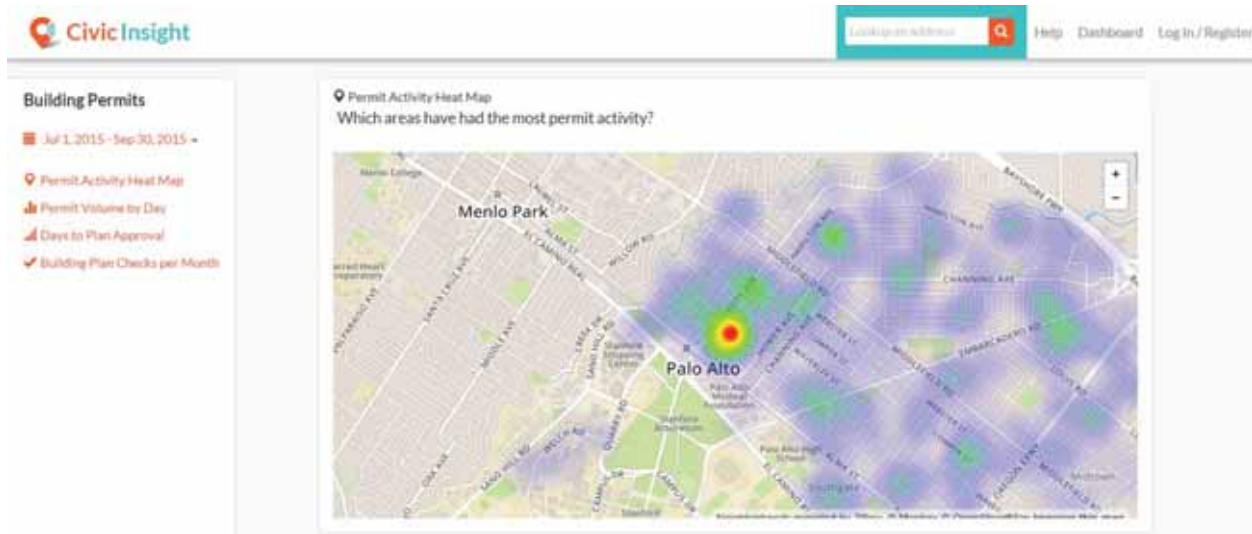


Exhibit 58: Civic Insight - Permit activity map



Exhibit 59: Civic Insight - Plan approval times by discipline

The figure below shows more engagement and community apps that have been developed with Accela's SDK.





### Engagement

Enable people and businesses to directly participate and engage in their communities.

 <p><b>311</b> by CityGovApp Provide your citizens the ability to submit service requests from the convenience of their mobile devices</p>	 <p><b>Contractor Central</b> by Accela Contractor track and schedule inspections and view permits the job site</p>
 <p><b>Garage Sale</b> by CityGovApp Apply for a permit, list items for sale and promote your event</p>	 <p><b>GoRequest</b> by Accela Tap right into your city and report the issue fast with GORquest</p>
 <p><b>OpenCounter</b> by OpenCounter Improve economic development</p>	 <p><b>WeGovern</b> by Accela Connect citizens with their local governments by improving the way they engage through "Town Hall" meetings</p>

### Community

Make it easy to do business and address key community issues.

 <p><b>Animal Services</b> by CityGovApp Obtain licenses for your pet registrations</p>	 <p><b>Buildingeye</b> by Buildingeye Detailed map, information and status updates for building permits in the U.S.</p>
 <p><b>Civic Insight</b> by Civic Industries Connect directly to a government's existing workflow systems to make government data available</p>	 <p><b>Garbage Collection</b> by CityGovApp Schedule and manage garbage collection activities</p>
 <p><b>PAT (Permit Application Tracker)</b> by CityGovApp and Razavi Location-based mobile app for tracking permits and licenses</p>	

**Exhibit 60: Accela, developers and partners are working together to build and deliver apps and services to enhance customer productivity.**

## 4.4 Pre-Recorded Demonstration

*4.4 - Provide access to a pre-recorded demonstration of some of the product's features, utilizing the software proposed to demonstrate to the City what using the software would look like. This demonstration should be no more than fifteen (15) minutes in length and must be accessible to the City at their convenience via physical media (such as a DVD), download from the Internet, or accessing the demonstration via a website.*

Accela has provided access to a pre-recorded demonstration of product features that can be accessed at: <https://vimeo.com/150507776>.

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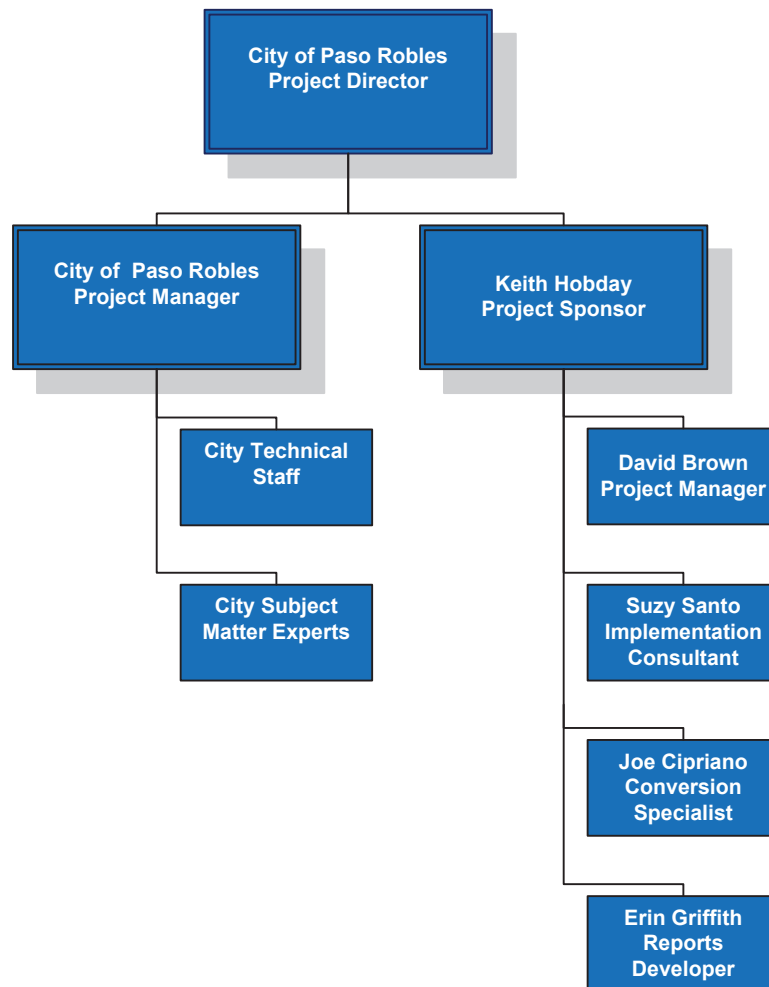
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## Section 5.0 Implementation Approach

*The Proposer should identify the proposed implementation approach, clearly identifying each phase, the timeline proposed, roles and responsibilities to be performed by the Proposer and those to be performed by the City.*

### 5.1 Organization Chart and Resumes

*5.1 - Provide a project organizational chart highlighting the key people being assigned to accomplish the work required by this RFP and illustrating the lines of authority, and designate the individual responsible for the completion of each service component and deliverable of the RFP. Provide brief resumes for the project manager and assigned project personnel assuming the proposed timeline.*



**Exhibit 61: Project Organizational Chart**

## **KEITH HOBDAY**

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### **Project Sponsor**

### **PROFILE**

Keith is a senior level manager with twenty five years of combined experience in government solutions, professional services and technology. He possesses extensive and proven abilities in, executive management, project management, systems analysis, systems design, team building and successful implementations.

### **PROFESSIONAL EXPERIENCE**

#### **TruePoint Solutions, LLC.**

*Loomis, CA*

*01/05 – Present*

#### **Partner**

A founding member and Principal of TruePoint Solutions, responsible for professional services, corporate leadership, and customer satisfaction.

Responsibilities include:

- Act as the project sponsor, project director, project manager, business analyst, configuration specialist, and/or quality assurance specialist in solo or team projects.
- Develop conversion document, programs and test plans
- Develop interface document, programs and test plans
- Develop scripting specification, scripts and test plans
- Develop, maintain and implement project timelines and deliverables
- Maintain system life cycle procedures and documentation
- Manage end user support procedures and productivity

#### Notable Projects:

- City of West Sacramento, CA - Project Director and implementation consultant for Business Licensing, Land Management and Code Enforcement.
- City of Asheville, NC - Project Director Accela Automation implementation
- County of San Mateo - Project Director Accela Automation implementation
- County of Stanislaus - Project Director Accela Automation implementation
- City of Santa Monica, CA - Project Director Accela Automation implementation
- City of Oklahoma City, OK – Project Director Accela Automation implementation
- City of Palo Alto, CA – Project Director Accela Automation implementation
- City of Tacoma, WA - Project Director, Accela Automation implementation for Building, Land Use and Site Development
- City of El Paso, TX – Project Director, Accela Automation implementation for Building, Planning, Health, Fire and Code Enforcement

- City of Sacramento, CA - Project Director, Accela Automation implementation
- County of Sacramento CA - Project Director, Accela Automation, Wireless, Apps, ACA, and AGIS implementation for Land Management and Business Licensing
- City of Alameda CA - Project Director, Accela Automation implementation for the Building, Planning, Code Enforcement, Public Works and Fire departments
- City of Tigard, OR - Project Manager/Implementation Consultant for the Tidemark to Accela Automation implementation
- City of Reno, NV - Implementation Consultant, Tidemark upgrade to Accela Automation
- Marion County, GA - Project Manager/Implementation Consultant, Tidemark to Accela Automation implementation
- Napa County, CA - Implementation Consultant, Accela Automation implementation

### **Hansen Information Technologies**

*Sacramento, CA*

*03/00 – 02/05*

#### ***Vice President, Professional Services***

Project Management, Consulting, System Integration, Data Conversion, and Training; managed sales and business partnership opportunities, client relationships and product direction

Responsibilities included:

- Member of the Hansen Board of Directors working closely with other board members to plan the direction and growth of the company.
- Worked closely with a select group of Hansen's customers (Hansen Advisory Board) to share ideas, needs and industry direction.

### **Hansen Information Technologies**

*Sacramento, CA*

*04/95 – 03/00*

#### ***Director of Projects***

Responsible for all project implementations including scheduling, consulting, data conversion and training. Developed separate industry specific business units for work management, permitting and utility billing applications.

Notable Projects:

- New Castle County, DE - Project Director for Utility Billing, Asset Management and Customer Service implementation; early adopter to true enterprise approach
- City of Portland, ME - Project Director, Utility Billing implementation.
- BexarMet Water District, San Antonio, TX - Project Director, Utility Billing implementation.
- City of Salem, OR - Project Director, Utility Billing implementation



**Hansen Information Technologies**

*Sacramento, CA*

*06/92 – 04/95*

**Senior Project Manager**

Responsible for project management and implementation for selected clients

Notable Projects:

- City of Nashville, TN - Hansen's first Advanced Inventory Control Implementation
- City of Bellingham, WA - Project Director, implementing the Sewer, Water, Plant, Street, Fleet, Customer Service, and FieldWORKS modules.
- City of Virginia Beach, VA - Project Manager, Storm, Street, Sewer and Water modules with interfaces to pavement management, bar coding, and GIS.
- City of Norwalk, VA - Project Manager, Sewer, Water and Plant modules, with interfaces to SCADA systems, PeopleSoft, and internal accounting systems.
  - City of Baton Rouge, LA - Project Manager, Sewer system implementation.

**Hansen Information Technologies**

*Sacramento, CA*

*12/87 – 06/92*

**Senior Project Manager**

Worked on the database design and system functionality of Hansen's first Windows applications; design, program and test computer based management for Sewer, Water, Street and Plant Maintenance systems

**SOFTWARE EXPERIENCE:**

- |                     |                |
|---------------------|----------------|
| ▪ Accela Automation | ▪ Permits Plus |
| ▪ Crystal Reports   | ▪ Hansen       |
| ▪ Tidemark          | ▪ Kiva         |

**EDUCATION:**

Bachelor of Science, Computer Science, 1987

**DAVID BROWN**

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**Project Manager**

**PROFILE**

As a member of the TruePoint team, David is experienced in managing multiple groups for implementation and application development in a government environment. David can manage multiple projects in all aspects of execution including budgeting, implementation design, execution, training and post go-live support. David is detail oriented and has strong management, communication and organizational skills.

**PROFESSIONAL EXPERIENCE:**

**TruePoint Solutions, LLC.**

*Tucson, AZ*

*10/11 – Present*

**Implementation Consultant**

As an Implementation consultant, David provides management skills to bring a Project to a successful completion.

Responsibilities included:

- Perform business analysis
- Identify and Determine current inefficiencies and gaps
- Share best practice implementation approaches with each client to increase productivity and gain efficiencies
  - Develop configuration and reporting requirements
  - Develop *As-is and To-be* documentation
- Configure software based on approved configuration document
- Provide training and guidance on system procedures
- Develop Event Scripts - JavaScript
- Develop Expression Builder Scripts
- Configure AGIS with ArcGIS for XAPO integration

Notable Projects:

- Pinal County, AZ
- Multnomah County, WA
- Cleveland, OH
- Tacoma, WA
- New York State
- Guilford County, NC
- Pasco County, FL
- El Paso, TX
- Santa Monica, CA
- Stockton, CA

**Pinal County**  
**Florence, AZ**  
**Server Application Supervisor**  
Responsibilities included:

**04/07 – 10/11**

- Supervise Server Application Specialist in coordinating multiple projects County-wide
- Present project schedules and budgetary plans to Department Directors
- Review County departments IT requirements and RFP proposals
- Determine proper server production hardware requirements for County-wide projects

**Accela, Inc.**  
**San Ramon, CA**  
**Sr. Implementation Consultant**

**08/06 – 04/07**

Among other duties, David was assigned the Contra Costa County project to manage the Accela Automation Project

Responsibilities included:

- Install and configure Accela's Land Management System along with Citizen Access, AGIS, Wireless, V360, EDMS (Electronic Data Management System) add on modules
- Develop EMSE (Event Management Script Engine) scripts to integrate with user input and system configuration
- Write/Publish system configuration enhancements
- Supervise Implementation Consultants on larger projects

Notable Projects:

- Contra Costa County

**Pinal County**  
**Florence, AZ**  
**Server Application Specialist**

02/04 – 08/06

Responsibilities included:

- Configuration, implementation of Accela Automation Permitting System within Thin Client architecture and maintain project scope within Microsoft Project
- Configure and maintain SQL Server databases
- Maintain multiple server clusters within an EVA/SAN and load balanced environment
- Provide user and administrative technical support with Accela Automation Permitting System and Desktop Computers
- Provide system and database support for Environment Health's Server/Client tracking system within Citrix environment
- Administer user training classes
- Install, configure & support F5 BigIP LAN traffic load balance server
- Plan/Configure version upgrades for supported applications
- Plan/Research/Deploy server equipment within development environment

Notable Projects:

- Project Manager for Accela Automation Implementation
- Project Manager for Development Services Department - Accela, GIS, and OnBase imaging integration

**Packaging Corporation of America (PCA)**

**Tucson, AZ**

11/91 – 12/03

**IT/Resource Manager**

Management of Information Systems, Purchasing, Scheduling, Customer Service, Shipping/Receiving

Responsibilities included:

- Install/maintain workstations, servers running Novell Netware 5.1, Windows NT, Windows 2000 Advanced Server, Windows 2000 Pro,
- Install/configure TCP/IP protocol on WAN & LAN structure, fiber optic connections
- Create/maintain security & users - Novell, Active Directory and local website

**LICENSES/CERTIFICATIONS**

- CNA-Certified Novell Administrator

**SOFTWARE EXPERIENCE:**

- Accela Automation
- Citrix
- Novell
- MSSQL Server Reporting Services
- Microsoft Office Products
- Active Directory
- OnBase
- MSSQL Server 2005, 2008, 2008R2

**EDUCATION:**

Bachelor of Science, Computer Science

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**SUZANNE SANTO**

**Implementation Consultant**

**PROFILE**

Suzy's career has run the gamut from Manager of a private Landscaping interest – whose clientele included the Bureau of Land Management, the US Army and the State of Texas – to Enterprise Application and Department Manager for the City of El Paso, Texas – to her current role with TruePoint Solutions. During her impressive career she has managed to utilize her experience and skills to meet client objectives and support commitments to enhance customer service, employee development and efficiencies, streamline processes and provide continuous functional improvements resulting in high performance.

**EXPERIENCE:**

**TruePoint Solutions**

*Business Consultant*

*Loomis, CA*

**2013-current**

Responsibilities included:

- Configuration and reporting specification documentation
- Perform business analysis
- Software configuration, testing, troubleshooting
- Provide training and development on system software
- Recommend solutions to increase productivity and gain efficiencies

Notable Projects:

- Guilford NC, Upgrade from 6.7 to 7.3 (Accela Automation)
- Lower Neches Valley Authority, TX (TruePoint)
- Pasco County, FL, (Accela Automation)
- Elephant Butte, NM (TruePoint)
- Tacoma, WA (Accela Automation)
- Denver CO, (Accela Automation/Reports)
- New York City, NY (Accela Automation)

**City of El Paso**

*Enterprise Application Manager*

*El Paso, TX*

**2012-2013**

Responsibilities included:

- Software configuration, testing, troubleshooting, and implementation.
- Perform business analysis and determine future system/hardware needs
- Provide training and development of department staff on system hardware and software
- Review internal processes and recommend solutions to increase productivity and gain efficiencies

Notable Projects:

- El Paso, TX (Accela Automation) – Animal Services Division 2012 (Shelter/Pound and Animal Collections)
- Accela National Advisory Council Chair 2011-2013

**City of El Paso**

***Business and Customer Service Manager***

***El Paso, TX***

***2011-2012***

I was charged to restructure, streamline processes, develop consistent employee performance and increase productivity in the Business Center of Engineering and Construction Management. The Business Center manages all permitting and licensing in the City of El Paso

Responsibilities included:

- Accela Automation Software System Administrator
- Develop cash management program
- Staff needs and development assessment
- Perform business analysis and determine solutions for improvement
- Provide training and development of department staff
- Provide informational services regarding policies, ordinances and procedures

Notable Projects:

- El Paso, TX (Accela Automation)

**City of El Paso**

***Department Administrative Manager***

***El Paso, TX***

***2009-2011***

Responsibilities included:

- Software configuration, testing, troubleshooting, and implementation.
- Coordination with multiple departments and included the selection of vendors
- Manage project core team
- Perform business analysis and determine solutions for improvement, including a mobile solution for field inspectors
- Develop end-user training program and user guides
- Align system configuration to City ordinances, policies and procedures
- Manage project funding, develop and procure project bids and departmental budget

Notable Projects

- El Paso, TX (Accela Automation)
- LifeSize - Enterprise Video Conferencing System
- Code Enforcement Reorganization

**City of El Paso**  
*Associate Ombudsman*  
*El Paso, TX*

**2007-2009**

Responsibilities included:

- TideMark Permitting/Licensing Software System Administrator
- Researching, planning, developing and implementing departmental strategies, goals and objectives for both long range and short-range goals
- Developed Departmental strategic plan for Process Improvement
- Initial research, analysis, contract negotiations
- Provide training and development of department staff on system software
- Perform business analysis and determine solutions for improvement
- Develop end-user training program and user guides
- Align system configuration to City ordinances, policies and procedures
- Manage project funding, develop and procure project bids and departmental budget

Notable Projects:

- El Paso, TX (Accela Automation, TideMark Advantage Software)
- ACF Technologies' Automated Customer Management System
- Selectron Technologies' Interactive Voice Response System
- Avolve – ProjectDox, Electronic Plan review
- Application Extender – Departmental Scanning Project/Paperless Initiative
- Represented the City of El Paso Building Department on the Public Improvement Committee for the Public Service Board of the El Paso Water Utilities

**City of El Paso**  
*Departmental Data Management Supervisor*  
*El Paso, TX*

**2006-2007**

Responsibilities included:

- TideMark Permitting/Licensing Software System Administrator
- Member of Implementation Team for TideMark Permitting and Licensing Software
- Researching, planning, developing and implementing departmental strategies, goals and objectives for both long range and short-range goals
- Procurement, configuration and implementation for the Customer Management System
  - Planning and management of the internal auditing program
- Financial reporting for the department permit and licensing
- Project management of department initiatives for accounts payable, procurement, and budget preparation
- Coordination, planning and management of administrative activities

Notable Projects:



- El Paso, TX (Accela Automation, TideMark Advantage Software)
- Appointed to the Texas Commission on Environmental Quality's Irrigation Advisory Board for 6 year term

### **Commercial Landscape**

#### ***Manager***

***El Paso, TX***

***1990-1999***

Responsibilities included:

- Managed commercial landscape division
- Project Landscape and Irrigation designs
- Develop and maintain project records and budget
- Projected estimated and actual cost
- Oversight payroll and related project expenses
- Project Analysis, Billing and Reconciliation

#### Notable Projects:

- Bureau of Land Management
- U.S Army
- Served 3 terms on the Board of Directors of the El Paso County Water Authority
- State of Texas appointment – Irrigation Advisory Council / Texas Commission on Environmental Quality
- Texas Turf Irrigation Association Board of Directors Trustee

Current Licenses

- Texas Irrigator
- Texas Irrigator Inspector
- Certified Backflow Prevention Assembly Tester

### **El Paso Central Appraisal**

#### ***Board Member***

***El Paso, TX***

***1996-1998***

Responsibilities included:

- Appointed chair for a tax appraisal panel to mediate property tax values accessed by the Central Appraisal District.
- Administer, interpret and access a property value under the accounting methods prescribed by the Texas Property Tax Code.

### **EDUCATION:**

Bachelors of Science, Business Administration, 2010

## **JOSEPH CIPRIANO**

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### **Conversion Consultant**

#### **PROFILE**

Responsible for the coordination and allocation of personnel resources to individual Land Management projects. Assist and support project managers in overall project management approach & problem solving. Monitor progress and status of projects. Provide technical expertise in the Land Management and Consumption Billing arenas.

#### **PROFESSIONAL EXPERIENCE:**

##### **TruePoint Solutions, LLC.**

*Loomis, CA*

*05/07 – Present*

##### **Senior Technical Consultant**

As the Senior Technical Consultant at TruePoint Solutions, Joseph has utilized his technical background to assist in large and small implementations with various software products. His attention to detail and his organizational skills result in quality installations.

Responsibilities include:

- Create Report Specification and Reports in Crystal or SSRS
- Develop strategies for converting data from legacy systems
- Create data conversion documents and data conversion programs
- Create interfaces to 3rd party data
- Create JAVA scripting (Event Scripts) to automate business processes
- Installation of various products on clients servers

#### Notable Projects:

- Buncombe County, NC – Converted historical data into clients existing Accela Automation database.
- County of San Diego, CA – Develop JAVA script interfaces to handle real time events in Accela Automation environment.
- City of West Sacramento, CA – Create Transact SQL procedure to convert Parcel and Address information into staging tables for Accela APO interface.
- Clackamas County, OR – Converted historical data into clients existing Accela Automation database.
- Stanislaus County, CA – Converted historical data into clients existing Accela Automation database.
- City of Cleveland, Cleveland, OH - Develop java script interfaces to handle real time events in Accela environment.
- City of El Paso, El Paso TX – Converted historical data from Tidemark to Accela Automation

**Hansen Information Technologies**

*Sacramento, CA*

*07/95 – 05/07*

**Data Conversion Specialist**

Joseph was recognized for his technical talents early in his career with Hansen and was assigned many varying tasks on large and small implementations.

Responsibilities included:

- Worked in team environments as either the lead conversion/interface developer or as a member in large conversion/interface implementations.
- Acquire Business processes and procedures at client sites to organize, document and create a functional analysis of business requirements.
- Interface with project managers and clients
- Coordinate and create plans for conversion, data mapping, data formats and implementation plans.
- Implement client data from various sources (text files, Dbase, MS Access, SQL Server and Oracle) using ODBC, MS Access, T-SQL, PL/SQL.
- Convert and preserve decommissioned, legacy system data as part of phased software implementations.
- Perform database tasks such as development of stored procedures, functions, SQL Queries, packages, triggers and creation of database objects such as tables, indexes, and views.
- Provide technical solutions and consultation on the conversion/ interface development needs of a given project.

**SOFTWARE EXPERIENCE:**

- Accela Automation, AMO, ACA,
- Oracle 7.3/8/8i/9i/10g/11g Client and Server
- Oracle PL/SQL
- Crystal Reports
- Visual Studio
- Windows Operating Systems
- Microsoft Office
- SQL Server 7/2000/2005/2008 R2
- Java Script
- Microsoft Transact SQL
- SQL Server Reporting
- PL/SQL Developer
- Dbase

## **ERIN GRIFFITH**

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### **Reports Developer**

#### **PROFILE**

Erin came to TruePoint with 10 years of programming and report development experience and has worked on a number of projects over the last two years for TruePoint.

#### **PROFESSIONAL EXPERIENCE**

##### **TruePoint Solutions**

*Loomis, CA*

*Jul-2010 to Present*

*Technical Consultant (Reporting Specialist)*

As a Technical Consultant on various projects Erin has the following responsibilities:

- Create Report Specification and Reports in Crystal or SSRS
- Develop strategies for converting data from legacy systems
- Create data conversion documents and data conversion programs
- Create interfaces to 3rd party data
- Create JAVA scripting (Event Scripts) to automate business processes
- Installation of various products on clients servers

Selected TruePoint Engagements:

- Stanislaus County, CA – Report writer and reporting trainer
- San Diego County, CA - Report writer
- Atlanta, GA - Report writer
- Corvallis, OR - Report writer and reporting trainer
- Clackamas, OR - Report writer and reporting trainer
- Asheville, NC – Report writer and reporting trainer

##### **Company Confidential**

*Crystal Reports Developer*

*Jul-2009 to 2010*

Erin was the sole report writer at an extremely fast paced company which deals with mortgage valuation and other real estate products. Most of her work involved PL/SQL ad-hoc queries and packages that are accessed by Crystal Reports. Responsibilities included:

- Working with departments throughout the company to create a suite of reports to meet each group's needs
- Custom design of customer reports and procedures using mainly Crystal Reports and PL/SQL
- Rewriting and optimizing stored procedures and packages
- Developing procedures and packages in Oracle using PL/SQL

**CorVel, OHSU, Foundation, Integra Telecom, Epiq Systems*****Crystal Reports/SQL Developer******Dec-2005 to Jun-2009***

During this time Erin worked on contracts with a variety of companies through Kforce (Integra), ATSI Group (CorVel and Epiq), and OHSU Foundation. She worked mainly as a Crystal Reports Developer with some time spent as a SQL developer as well.

**Genesis Financial Solutions, Inc.*****Crystal Reports Developer******Sep-2004 to Dec-2005***

At GFS Erin was the Crystal Reports Developer for a company specializing in debt purchasing and recovery. I did everything that goes between the Data Warehousing and the final Crystal Report. This includes managing and coding for the Data Mart, writing and testing the queries for the reports, and development and quality assurance of the reports themselves.

**Zoot Enterprises, Inc.*****Crystal Reports Developer and Applications Programmer******Bozeman, MT******Dec-2000 to Apr-2004***

At Zoot Erin was the senior reports developer as well as an applications programmer. She worked on a variety of projects for many of the nation's top financial institutions. The most challenging of those involved creating custom reports for Bank of America, First Tennessee, and MBNA that cover every aspect of the Credit Analysis process. For Bank of America I led the report development on a web delivered reporting system that takes 60 reports and turns them into over 700 scheduled Adobe and Excel files, covering their entire sales force and all aspects of their business.

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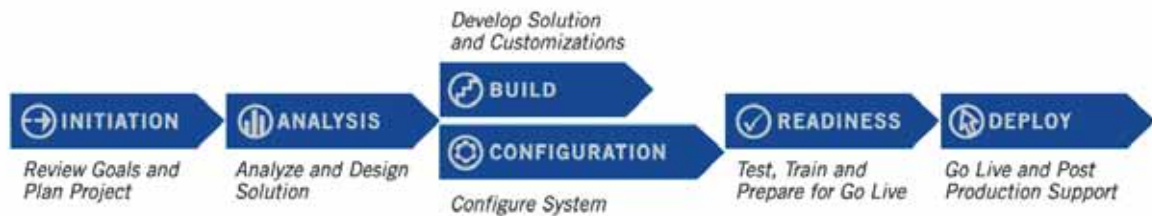
## 5.2 Implementation Methodology

*5.2 - Describe your implementation methodology and approach. This includes the tools and techniques that will be used, proprietary methodologies that the firm will employ, the staffing model and other elements the Proposer deems relevant for this engagement.*

The following project methodology is intended to serve as an example of a typical project plan for engagements similar to the services expected by the City of Paso Robles.

TruePoint will work with City staff to optimize Accela’s portfolio of software, and the customer experience to enable the City to successfully deploy its Accela Automation solution and meet its functionality, timing and cost requirements.

The following graphic depicts the implementation process, broken down into six project stages.



TruePoint proposes a joint team approach to collaboratively configure and implement the Accela Automation software. The system will be implemented using a combination of resources from the City and TruePoint. This will ensure the City is prepared to maintain configurations within the system going forward by having hands on experience during the configuration.

During the Project Initiation stage, TruePoint will create a project plan with a critical path summary, as well as review, in conjunction with the City project staff, all project milestones and deliverables that detail the effort described for this engagement. The draft of the project plan will be incorporated into a Master Project Plan that will be maintained by TruePoint and the City.

A Project Kickoff meeting will also take place during this project stage.

### 5.2.1 Project Management

TruePoint will perform project management services needed to plan and monitor execution of the project in accordance with deliverables outlined in the Scope of Work.

Generally these services include the following:

- ➔ Project Initiation
- ➔ Change order management
- ➔ Issue log management and escalation
- ➔ Resources management
- ➔ Meetings management

Project Management tasks will be shared between the TruePoint Project Manager and the City Project Manager. A project plan will be maintained and monitored using Microsoft Project

## **5.2.2 Discovery and analysis of the City's business requirements**

During the Configuration Analysis stage, TruePoint will conduct interviews with key representatives from City offices involved in the business processes for each department. Configuration Analysis is comprised of the activities required to define the baseline configuration of Accela Automation for the Agency. The key outputs of the process are Configuration Analysis Worksheets (AKA Configuration Document), which serve as a 'blueprint' for all design and configuration efforts throughout the implementation project and establish the benchmarks for testing and acceptance at the conclusion of the project. As a part of this effort, TruePoint will also identify key Accela Automation features that can best support these processes.

## **5.2.3 Analysis of current systems and data conversion**

Once the system design and configuration are finalized TruePoint will create a detailed data conversion document that will be used as a road map for the final data conversion. This conversion specification roadmap can also be used as a final test specification for the conversion.

## **5.2.4 Configuration of the hosting environment**

Since Accela will host the solution there will be minimal to no effort from the City needed to gain access to the Accela application system. A VPN tunnel will need to be put in place to establish communication between the Accela Cloud and the Counties ArcGIS server.

### **5.2.5 Development and implementation of interfaces**

The Build stage of the implementation includes data conversion, report development, creation of Accela event scripts to automate business processes, and configuration of Accela add-on products and interfaces. A more detailed analysis of possible interfaces will need to be completed with the City once the core team understands more about the capabilities of Accela Automation.

### **5.2.6 Software installation and configuration**

As noted above, there will be minimal to no effort from the City needed to gain access to the Accela system.

For system configuration TruePoint will provide professional services to configure Accela Automation in accordance with requirements established and agreed upon during the System Configuration Analysis effort. Based on the System Configuration Document, TruePoint will configure the Record Types, Workflows, Fees, Inspections, Conditions and other features identified in the configuration document.

Once the base configuration is in place TruePoint will create an administrator and daily user console to be used during testing. City staff will be trained and responsible for creating users, user groups, and additional consoles, customized portlets, customized ASI from layouts, and expression editor rules as needed for their configuration.

### **5.2.7 Training**

Consistent and thorough training ensures that City personnel have the knowledge required to use Accela Automation to its greatest potential. Training plans are developed as part of the project's Statement of Work and address the City's specific operational and administrative needs.

### **5.2.8 Acceptance testing**

TruePoint performs functional, performance, and reliability testing on each system component as it is developed and/or configured during the course of the project. Once all system components have been completed, we will work with the City to perform comprehensive end-to-end User Acceptance Testing (called User Acceptance Testing in our Implementation Methodology). User Acceptance Testing includes all system components, processes, workflows, customizations, interfaces, and reports. User Acceptance Testing is the final validation that the system functions in the way it is intended.

We recommend the City designate User Acceptance Testing leads. These individuals will work with TruePoint to create testing scenarios that represent all possible business processes, and simulate real life to the greatest extent possible.



We will gather this information and aid in writing the accompanying test scripts that are used as instructions for each test.

### 5.2.9 Parallel Process Monitoring

As part of user acceptance testing TruePoint recommends that real world activities in your current system are applied to the newly configured Accela Automation system. This test will prove that the system functions as desired and gives staff the opportunity to ensure that system components like fees, workflow and inspections all work properly.

TruePoint can discuss the pros and cons of true parallel system processing during go-live but we do not believe it is required to continue to use your legacy system after the Accela go live.

### 5.2.10 Final Implementation

Production Go Live is defined as the first production use of the system. TruePoint will be on site during the cutover process and provide up support for the City end users and project team. TruePoint will then provide on-call support or long term configuration support if desired by the City.

## 5.3 Roles & Responsibilities

*5.3 - Describe the roles and responsibilities of both the City staff and Proposer staff during each phase/component of implementation. In addition, provide an estimated level of effort for the City staff during implementation.*

### 5.3.1 Agency Resources

roles with the appropriate personnel to work together with the Accela Project Team. Additionally, the City will make available additional resources as needed for the Services to be successful. City roles can be filled by the same person. In addition, the City will provide all necessary technical resources to make appropriate modifications within any Agency systems wishing to integrate with any Accela systems. These resources must be proficient in Agency coding/development environment and tools, to make the required changes to their software to enable integration and must be available during the timeframe of these Services. Paso Robles' roles would include Sponsor, Project Manager, Technology Manager, and Business Lead(s).

Agency Resources	Description
Project Sponsor	Responsibilities include: <ul style="list-style-type: none"> <li>▪ Ultimate responsibility for the success of the project,</li> <li>▪ Creating an environment that promotes project buy-in,</li> </ul>

Agency Resources	Description
	<ul style="list-style-type: none"> <li>▪ Driving the project through all levels of the agency,</li> <li>▪ High-level oversight throughout the duration of the project,</li> <li>▪ Serving as the primary escalation point to address project issues in a timely manner.</li> </ul>
Project Manager	<p>Responsibilities include:</p> <ul style="list-style-type: none"> <li>▪ Overall administration, coordination, communication, and decision-making associated with the implementation;</li> <li>▪ Planning, scheduling, coordinating and tracking the implementation with Accela and across departments within the agency;</li> <li>▪ Ensuring that the project team stays focused, tasks are completed on schedule, and that the project stays on track.</li> </ul>
Division/Departmental Business Leads	<p>A user representative for each affected department must be appointed to facilitate analysis and configuration and serve as a decision-making entity for that group. These critical appointments may well determine the success of the implementation for their respective areas. Responsibilities include:</p> <ul style="list-style-type: none"> <li>▪ Attending requirements workshop sessions;</li> <li>▪ Willing and able to gather data and make decisions about business processes;</li> <li>▪ Assist in the creation of specifications for reports, interfaces &amp; conversions</li> <li>▪ Review and test the system configuration;</li> <li>▪ Participating in the implementation of the Accela Automation solution.</li> </ul>
Division/Departmental Subject Matter Expert (SME)	<p>Responsibilities include:</p> <ul style="list-style-type: none"> <li>▪ Being trained on the Accela Automation system at a System Administration level;</li> <li>▪ Being fully engaged in the Business Analysis and system configuration activities;</li> <li>▪ Assist internal efforts towards the creation of reports, interfaces &amp; conversions;</li> <li>▪ Assist in the review and testing of the system configuration;</li> <li>▪ Actively participate in the full implementation of the Accela Automation solution.</li> </ul>
Technical Lead	<p>Responsibilities include:</p> <ul style="list-style-type: none"> <li>▪ Primary responsibility for the technical environment during the software implementation;</li> <li>▪ Ensure that servers, databases, network, desktops, printers, are available for system implementation and meet minimum standards;</li> <li>▪ Work with Accela technical personnel during implementation;</li> <li>▪ Maintain test and production databases;</li> <li>▪ Perform day-to-day maintenance of the system and install maintenance releases;</li> <li>▪ Act as the primary technical resource for troubleshooting problems;</li> <li>▪ Establish and maintain backup, archival, and other customary maintenance and housekeeping activities.</li> </ul>

Agency Resources	Description
Report Developer	Responsibilities include: <ul style="list-style-type: none"> <li>▪ Understanding reporting needs of Agency</li> <li>▪ Ability to write or amend reports as the Agency's report needs grow.</li> </ul>

### 5.3.2 Accela Resources

Accela will assign key Professional Services resources for this engagement with Agency. These individuals are well versed in the Accela Automation application, and are well qualified to lead this effort. Accela's Project Manager shall assume full responsibility for the coordination of this team and its interaction with key Agency resources assigned to the effort. The main roles are as follows:

Accela Resources	Description
Project Executive	The Project Executive oversees the project's progress/direction and works with the Project Manager to ensure efficiency, consistency and quality in delivery of Accela implementations. The Project Executive actively participates in a project director/executive role. The Project Executive will meet with Agency Executives monthly or upon request throughout the duration of the project.
Project Manager	The Accela Project Manager is responsible for the overall project management and works directly with the client throughout all aspects of Accela implementations: from the initial scoping, planning, staffing to delivery. The Project Manager undertakes the project administration tasks including: <ul style="list-style-type: none"> <li>▪ Project plan management,</li> <li>▪ Change order management,</li> <li>▪ Issue log management and escalation,</li> <li>▪ Status reporting,</li> <li>▪ Project workspace management,</li> <li>▪ Resources management,</li> <li>▪ Meetings management,</li> <li>▪ Project review with Project Executive.</li> </ul> In addition, the Project Manager will actively participate in leading the System Configuration Analysis sessions and will be responsible for the creation of the System Configuration Document.
Senior Implementation Consultant	The Senior Implementation Consultant assigned to the project will have major experience in the business process as well as the product functionality and is responsible for: <ul style="list-style-type: none"> <li>▪ Business analysis activities: Mapping the client's business processes and requirements to the functionality of Accela's products and the creation of solution design,</li> <li>▪ Leading system configuration activities,</li> <li>▪ Providing training/mentoring to agency staff,</li> </ul>

	<ul style="list-style-type: none"> <li>Recommend industry best practices to agency to enhance business processes,</li> <li>Guide agency on how best to configure the system based on past experiences and software expertise.</li> </ul>
Implementation Consultant	<p>Implementation Consultant resources support the project and typically focus on the following tasks.</p> <ul style="list-style-type: none"> <li>The configuration of the system to match the System Configuration document.</li> <li>Build activities within the project, such as conversion data mapping, creation of reports and interface specification.</li> </ul>
Technical Consultant	<p>Accela Technical Consultants are involved in all areas that require knowledge on server-side considerations and Accela add-on products such as:</p> <ul style="list-style-type: none"> <li>Application installation and setup (Accela Automation, Accela GIS, Accela Wireless, and Accela Citizen Access),</li> <li>Report definition and creation,</li> <li>Event Manager Script definition and programming,</li> <li>Database Conversions and data mapping assistance,</li> <li>Interface specifications and development.</li> </ul>
Training Consultant	<p>Training Consultants are responsible for Accela Training classes with assistance from Implementation consultants, depending on the nature of the specific project.</p>

## 5.4 Training Methodology

*5.4 - Describe your training methodology and how you ensure users are prepared to use the new system. Provide sample training documentation.*

### Train the Trainer Training

TruePoint generally finds a Train the Trainer approach preferable. We offer three different levels of training, Admin, Tech, and End User. We have proposed to provide XXX hours of training to the City as part of this implementation effort – but it is our expectation that the content and category of training will be established by the joint project team to best meet the needs of the City. We expect most of this training to be conducted onsite at the City’s facilities. We will provide onsite Product training for up to 20 users.

A complete training plan will be developed working directly with the City once all system users are identified. TruePoint is open to the traditional classroom approach to training provided by TruePoint instructors or the Train-the-Trainer approach which would enable City staff to take on some of the training effort. Clearly the costs of a Train-the-Trainer approach are much lower than full classroom based End-User training for all staff. Having an internal team of staff

able to carry on the Training activities after the project has been completed is the best way to insure sustainability of the implementation for the City.

### **User and Administrator Classroom Training**

On-site training courses are available in a traditional classroom setting and are led by a TruePoint training professional. These courses can be generic or tailored to match the City's configuration. Class lengths vary between four hours and can last days. The number of attendees is limited to between 7 and 15 participants at a time. During classroom end user training, the TruePoint trainer will guide each user group through the screens, functions, and features that pertain to their job roles. These structured and formal sessions will provide hands-on experience using the actual system. Some exercises will be trainer-led, while others will allow users to experience the system independently and at their own pace.

### **Post Implementation Training**

For all our local customers TruePoint hosts free regional educational seminars after each major release. Accela company newsletters and the Accela website also keep our clients up to date on new training, offered product information, and company news.

Accela also offers free webinars (online seminars) to current and prospective clients who wish to learn more about Accela products and their value and full access to the Accela Community site.

## **5.5 Project Management Methodology**

*5.5 - Describe your project management methodology and activities that will be performed during implementation.*

As noted in our Implementation Methodology section, TruePoint will perform project management services needed to plan and monitor execution of the project in accordance with deliverables outlined in the Scope of Work.

Generally these services include the following:

- ➔ Project Initiation
- ➔ Change order management
- ➔ Issue log management and escalation
- ➔ Resources management
- ➔ Meetings management

Project Management tasks will be shared between the TruePoint Project Manager and the City Project Manager. A project plan will be maintained and monitored using Microsoft Project.

## 5.6 Change Management Methodology

*5.6 - Describe your change management methodology and activities that will be performed during the implementation.*

In order to make a change to the scope of Professional Services, the City would be required to submit a written request to TruePoint specifying the proposed changes in detail. TruePoint would then submit to the City an estimate of the charges and the anticipated changes in the delivery schedule that would result from the proposed change in the Professional Services. TruePoint would continue performing the Professional Services in accordance with the agreed upon SOW until both parties agree in writing on the change in scope of work, scheduling, and fees therefore. Any Change Order shall be agreed to by the parties in writing prior to implementation of the Change Order. If TruePoint's effort changes due to changes in timing, roles, responsibilities, assumptions, scope, etc. or if additional support hours are required, a change order will be created that details these changes, and impact to project and cost (if any). Any change order shall be signed by TruePoint and the City prior to commencing any activities defined in the change order.

## 5.7 User Acceptance Methodology

*5.7 - Describe your user acceptance methodology and the responsibilities of City staff during testing.*

TruePoint performs functional, performance, and reliability testing on each system component as it is developed and/or configured during the course of the project. Once all system components have been completed, we will work with the City to perform comprehensive end-to-end User Acceptance Testing (called User Acceptance Testing in our Implementation Methodology). User Acceptance Testing includes all system components, processes, workflows, customizations, interfaces, and reports. User Acceptance Testing is the final validation that the system functions in the way it is intended.

We recommend the City designate User Acceptance Testing leads. These individuals will work with TruePoint to create testing scenarios that represent all possible business processes, and simulate real life to the greatest extent possible. We will gather this information and aid in writing the accompanying test scripts that are used as instructions for each test.

## 5.8 Data Conversion Methodology

*5.8 - Describe your conversion methodology that will be used to implement the new system. As part of this, recommend what should be converted.*

The mapping of the data from the source system to Accela Automation will begin after a comprehensive business process analysis. It is expected that the City will

provide a resource that has ample knowledge of the source system and source system data structure. The TruePoint project manager will work with the City assigned resource to develop a plan to convert the data. The City will be responsible for either extracting the data, providing database views, or other knowledge to assist in mapping.

All mapping details will be maintained in a data conversion document. The mapping will show the source field, the database field, the screen and field name, and any applied business rules. Whenever possible and applicable, screen shots will be included in the document with the fields populated with client data. The mapping will be reviewed by the TruePoint project manager, TruePoint conversion specialist, and the assigned client stakeholders. The mapping will also be compared against the requirements and the business processes.

Upon acceptance of the conversion mapping document, a TruePoint conversion specialist will begin developing the data conversion. During this time, the project manager will develop test cases for the data conversion. These test cases will be made available to the client as they are completed. As portions of the data conversion are completed, the conversion will be uploaded to the client server for review and testing.

The data conversion mapping and conversion development will be an iterative process. Changes and issues will be submitted to the TruePoint project management for recording and management. Details of the issue tracking process will be detailed in the project management plan. As issues are fixed and approved changes included in the conversion, the updated converted database will be uploaded to the customer's server for review, testing, and ultimate acceptance.

## **5.9 Documentation Deliverables**

*5.9 - Describe what documentation is to be delivered during the implementation.*

### **5.9.1 Implementation Documentation**

TruePoint provides various documents throughout the life of the project. The primary implementation documents will be the project plan, system configuration document, data conversion document and report specification documents.

### **5.9.2 User and Administrator Documentation**

Accela provides each client with Accela Civic Platform documentation, for the product the agency has acquired and is implementing. This documentation is provided at no additional charge since it is inherently part of the implementation tools and documents that are necessary to give users and system administrators' knowledge about the facets and operation of the system.

Accela will provide the City with one soft copy in portable document file (.pdf) format, of all documentation necessary for the Accela Civic Platform acquired under the proposed contract. The City will have the right of reproduction so that as many copies can be made of the documentation as necessary for training or subsequent purposes. Additionally support documentation, notes and other reference materials are provided. The Exhibit below lists the available product documentation.

All Accela product documentation is available to clients on Accela Community.

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## ACCELA PRODUCT DOCUMENTATION








Welcome to the Product Documentation Site on the Accela Community. Here you'll find the most recent installation, administration, and user documentation, as well as documentation for previous releases and legacy products.

Current product documentation is also available on the [Accela Content Cloud](#), which can only be accessed from inside the Accela firewall. If you are outside the Accela firewall, you can [download the Accela Content Cloud](#) to your local machine and run it as an Adobe AIR application.

If you're unable to find what you're looking for, or have any other questions, please [email us](#).

Select a product or topic below to view the associated documentation set:

### CURRENT PRODUCTS/MODULES







-  [Accela Automation](#)
-  [Accela Citizen Access](#)
-  [Accela Mobile Citizen Access](#)
-  [Accela GIS](#)
-  [Accela IVR](#)
-  [Accela Mobile Office](#)
-  [Accela Mobile](#)

-  [Accela Asset Management](#)
-  [Accela Land Management](#)

### OTHER

-  [Interfaces](#)
-  [Technical Data Sheets](#)

### LEGACY PRODUCTS

-  [Accela AMS](#)
-  [Accela GIS \(Classic\)](#)
-  [Accela Wireless](#)
-  [Kiva DMS](#)
-  ['PERMITS' Plus](#)
-  [Tidemark Advantage](#)

## Exhibit 62: Accela Product Documentation on Accela Community

## 5.10 Project Schedule

5.10 - Provide detailed task/activity listing that identifies resources, level of effort, and timeline.

The following is an example of a high level major task list reflecting a project plan for an engagement of this nature.

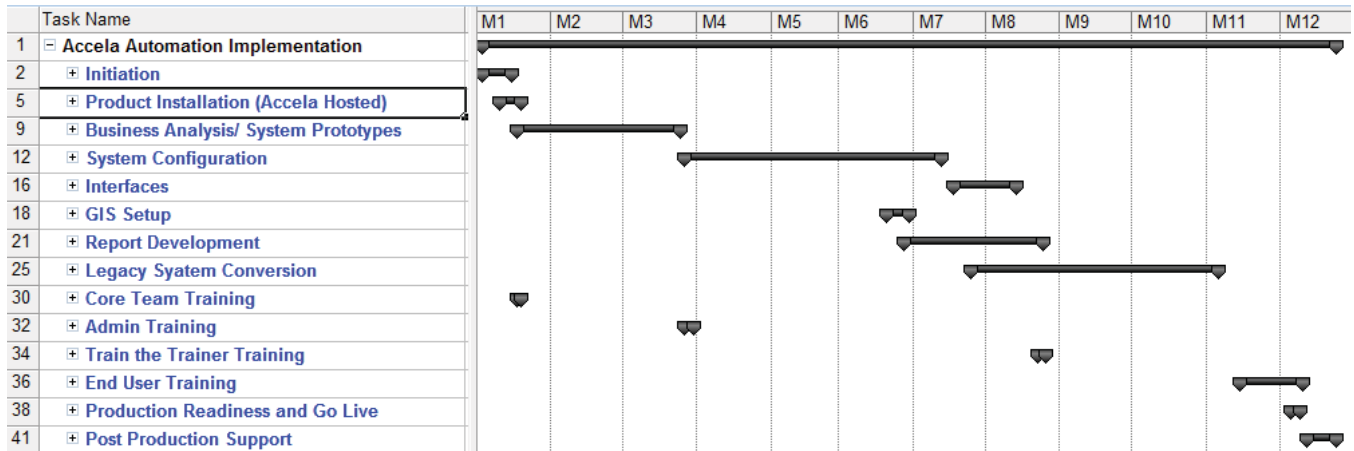


Exhibit 63: Sample Project Schedule

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## Section 6.0 Other Requirements

*In this section of the proposal, the Proposers should address the following items in a concise manner.*

### 6.1 Support

*6.1 - Describe ongoing maintenance, release/upgrade, and support services. At a minimum, Proposers should address the following items:*

- Help desk processes and procedures to include methods of support (i.e. online, telephone, etc.)
- Hours of support (stated in Pacific Standard Time)
- After-hours support
- Escalation procedures
- Response time commitments

#### 6.1.1 Accela Customer Support Team Overview and Hours of Support



Accela’s Customer Support, based in our San Ramon, California headquarters, provides live technical support between 4:00 a.m. and 6:00 p.m. Pacific Time, Monday through Friday, excluding Accela-observed holidays. Staffed with nearly 80 support professionals, the Customer Support team responds to all client issues and routes technical incidents accordingly based on the nature of the incident. A distinguishing feature of Accela’s Post Sales Customer Support program is that we do not charge a higher fee for a higher level of care. There are no special plans defining “levels” of customer support. The Accela Customer Support team provides the same level of superior service to all clients, which includes:

- Providing information in a timely and professional manner
- Performing best efforts to resolve any incidents submitted
- Documenting each incident and its resolution
- Escalating incidents to other Accela departments as necessary
- Tracking the duration of open incidents and ensure forward progress
- Communicating the progress of open incidents with customers up to and including resolution
- Delivering fixes and workarounds for any incidents

## 6.1.2 Methods of Support

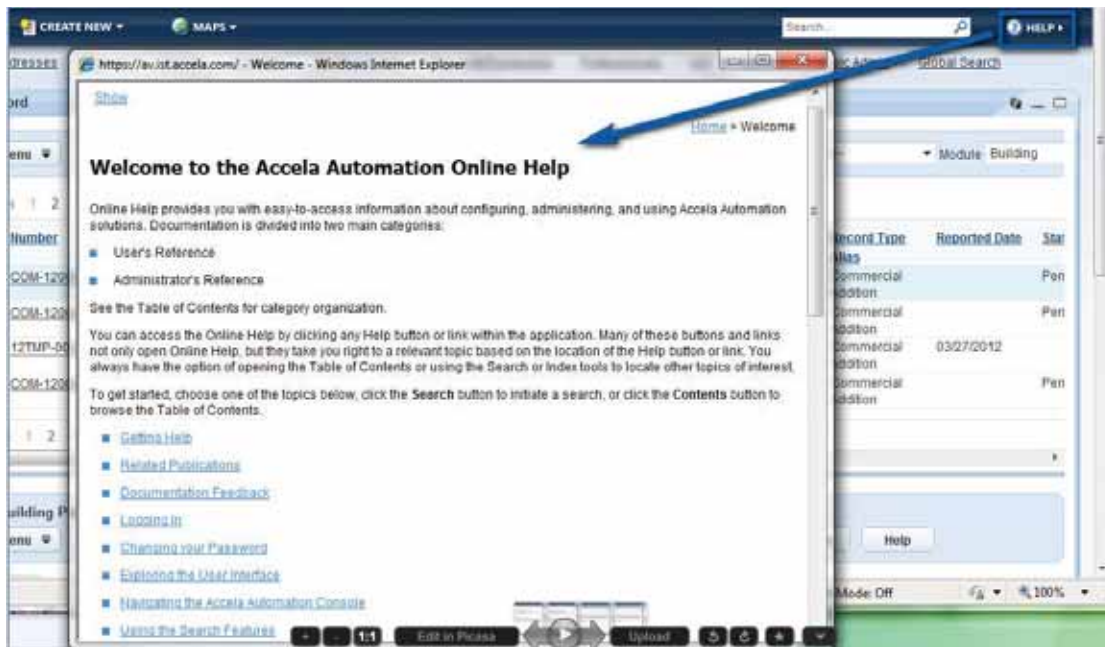
Pursuant to our standard maintenance agreement (included in the Additional Information section of this proposal, Natalie insert at the last section), the following services are included in Accela's annual maintenance:

- **Telephone Support** – Accela provides a telephone number to contact Customer Support, Accela's live technical support facility.
- **E-Mail Support** – Accela will provide one or more electronic mail addresses to which a customer may submit routine or non-critical support requests 24 hours a day, which Accela will address during its regular business hours.
- **Online Support** – Accela will provide access to archived software updates and other technical information in Accela's online support databases, which are available 24 hours a day.
- **Remote Support** – When required to properly resolve a maintenance request, Accela will provide remote assistance via the WebEx environment or another mutually acceptable remote communications method.
- **On-Site Support** – If remote support is not acceptable, Accela can provide on-site assistance, which will be billed at Accela's then-current time and materials rates. In addition to these charges, compensation for associated airfare, lodging, rental transportation, meals, and other incidental expenses will be billed as accrued.
- **Software Updates** – Accela will provide revisions of and enhancements to maintained software products as such updates are generally released. We deliver, or make available to customers for download, software updates and supporting documentation via our File Transfer Protocol (FTP) site.

Other than the direct support provided by the Customer Support Team, there is also a variety of additional support resources the City could leverage upon system go-live, including: Context Sensitive Online Help; Accela Success Community and Accela Ideas.

### Context-Sensitive Online Help

Accela's Civic Platform provides online help as well as fully indexed, searchable, and editable help files for all features and functions. To use online help, the user simply clicks the Help button on any menu bar. Our Civic Platform will display the help topic specific to the current screen. The image below illustrates this feature.



### Accela Civic Platform's Online Help Feature

#### Accela Success Community

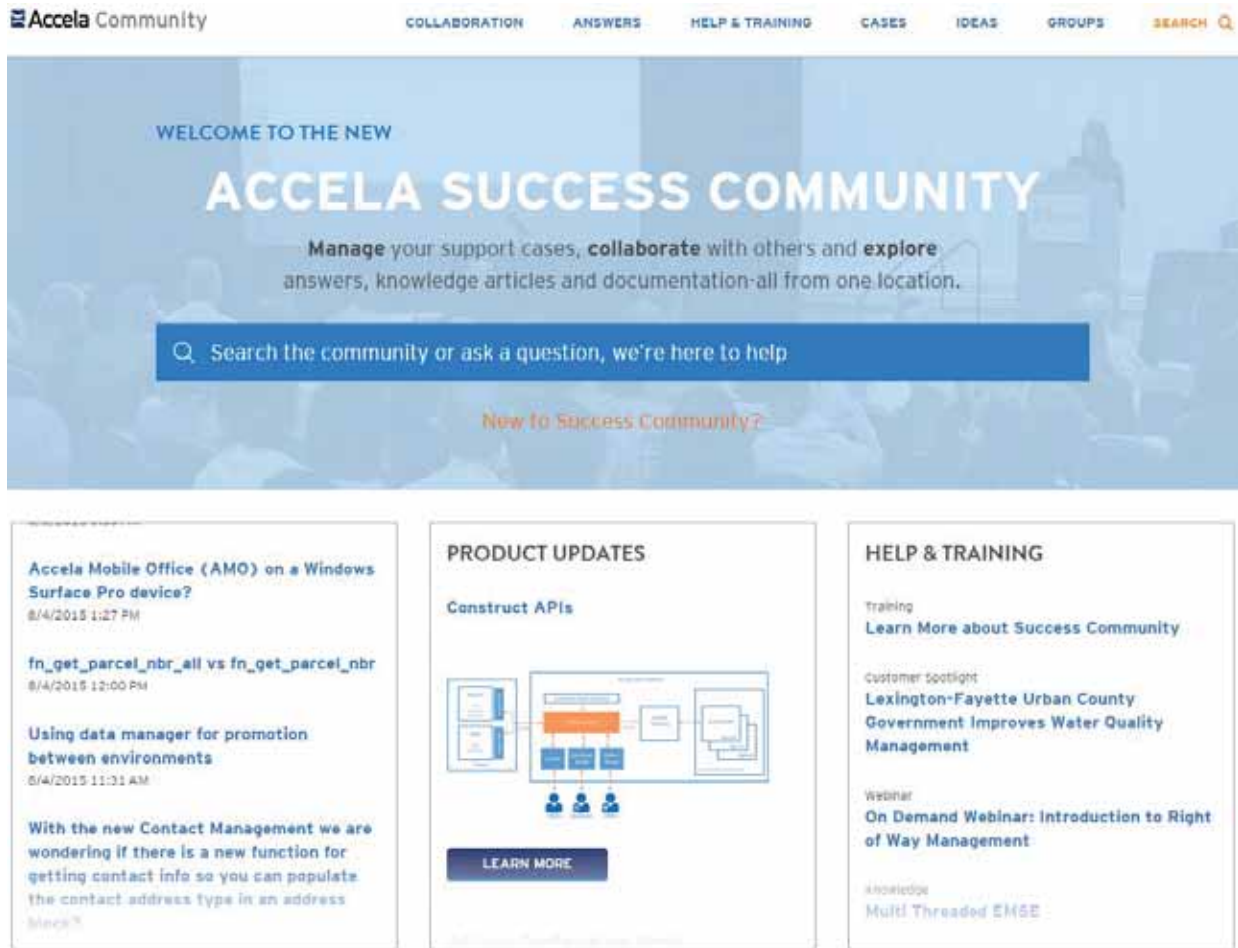
Accela's public community website (<https://accela.force.com/success/CommunityLogin>) is where our solution experts blog about industry news, preview new features and upcoming releases. The Community is open to our customers, prospects, developers, and partners to learn about Accela solutions, discuss ideas for how to get the most out of the Civic Platform, and share tips with others.

Users will also enjoy:

- One-stop location for all things Accela
- Streamlined access to support cases and knowledge
- One login and password
- Enhanced search capabilities
- Rate articles and discussion threads
- Reduction of emails
- Follow only the items that interest you

- ➔ **Getting everything in one place** – Single sign-on for documentation, support, articles, and conversations with other community members.
- ➔ **Finding information easily** – Search a topic and get results from all areas of the Community with enhanced search capabilities.
- ➔ **Experiencing an improved enhancement request process** – The process provides consistency, offers a look into the planning and development process and provides opportunities for users to collaborate directly with product owners.
- ➔ **Providing feedback** – Rate articles and discussion threads and vote on ideas.
- ➔ **Keeping up with what's important to you** – Follow topics and people that you are interested in.

- ➔ **Reducing your emails** – Easy-to-access profile settings give users full control of content consumption and frequency.



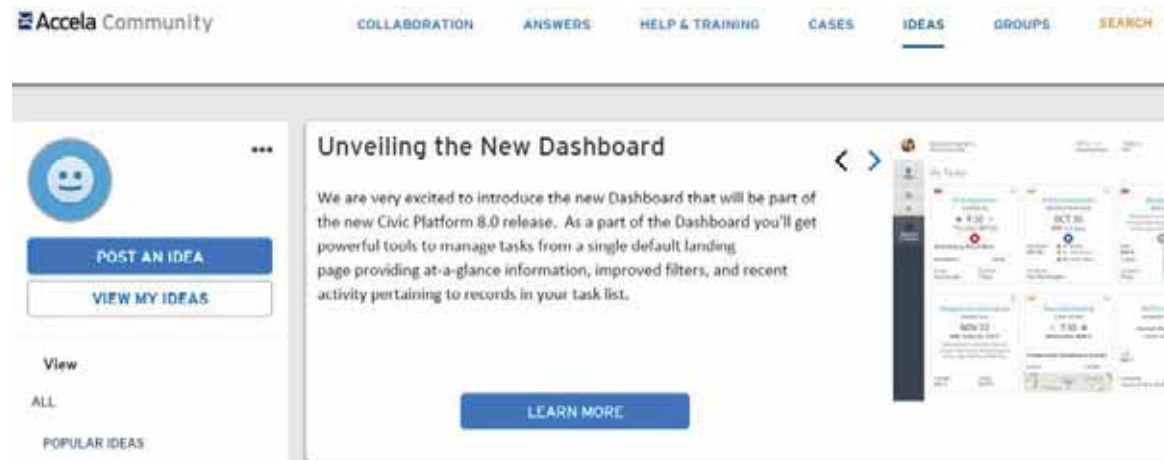
**Accela Success Community homepage**

### **Accela Ideas**

Ideas is a valuable resource that allows users to share ideas on potential new solution functionality with Accela and other Civic Platform users, collect feedback from others, and comment and vote on ideas proposed by others. Ideas is a key data point used by our Product Management team as part of release planning, so we encourage others to comment on and vote for your idea. Since active input and involvement is essential for all ideas, Ideas allows users to comment on and vote for (or against) ideas posted by others.

Whether you are in active implementation, have used the product for years, are a development partner, mobile user, or Accela staff, anyone using any Accela solution can submit an idea. By opening Ideas to such a large audience, we hope

to better serve our users by bringing focus to features that are popular among the entire community, offer the most business value, and result in solutions users love.



**Ideas page on Success Community**

As an idea receives votes and progresses through the assessment process the status will be updated according to the following guidelines:

- ➔ **The Next Big Idea** – This status is the default initial status assigned to all submittals.
- ➔ **We built it** – This status is assigned to ideas that have made it into a release.
- ➔ **We're working on it** – This status is assigned to ideas that are in development and are expected to be included in an upcoming release.
- ➔ **Current release candidate** – This status is assigned to ideas that are actively being considered as within the potential scope for an upcoming release but are not yet in development.
- ➔ **Very interesting** – This status is assigned to ideas that are not actively being considered as within the scope for an upcoming release but which may become release candidates in the future.
- ➔ **Let us chew on it** – This status is assigned to ideas that have received at least 100 points but may not currently align with the product roadmap and are therefore not currently expected to become release candidates.
- ➔ **Under point minimum** – This status is assigned to ideas that have received fewer than 100 points.
- ➔ **Closed** – This status is assigned to ideas that have been closed due to duplication or any reasons other than that the idea has made it into a release.

We encourage users to check the status of an idea at any time by returning to the Ideas page.



### 6.1.3 After-Hours Support

Accela Civic Platform customers can access numerous avenues of after-hours system support, many of which have already been discussed in this section:

- ➔ Accela Civic Platform’s integrated online help
- ➔ Accela Success Community
- ➔ Email requests to Accela’s Customer Support

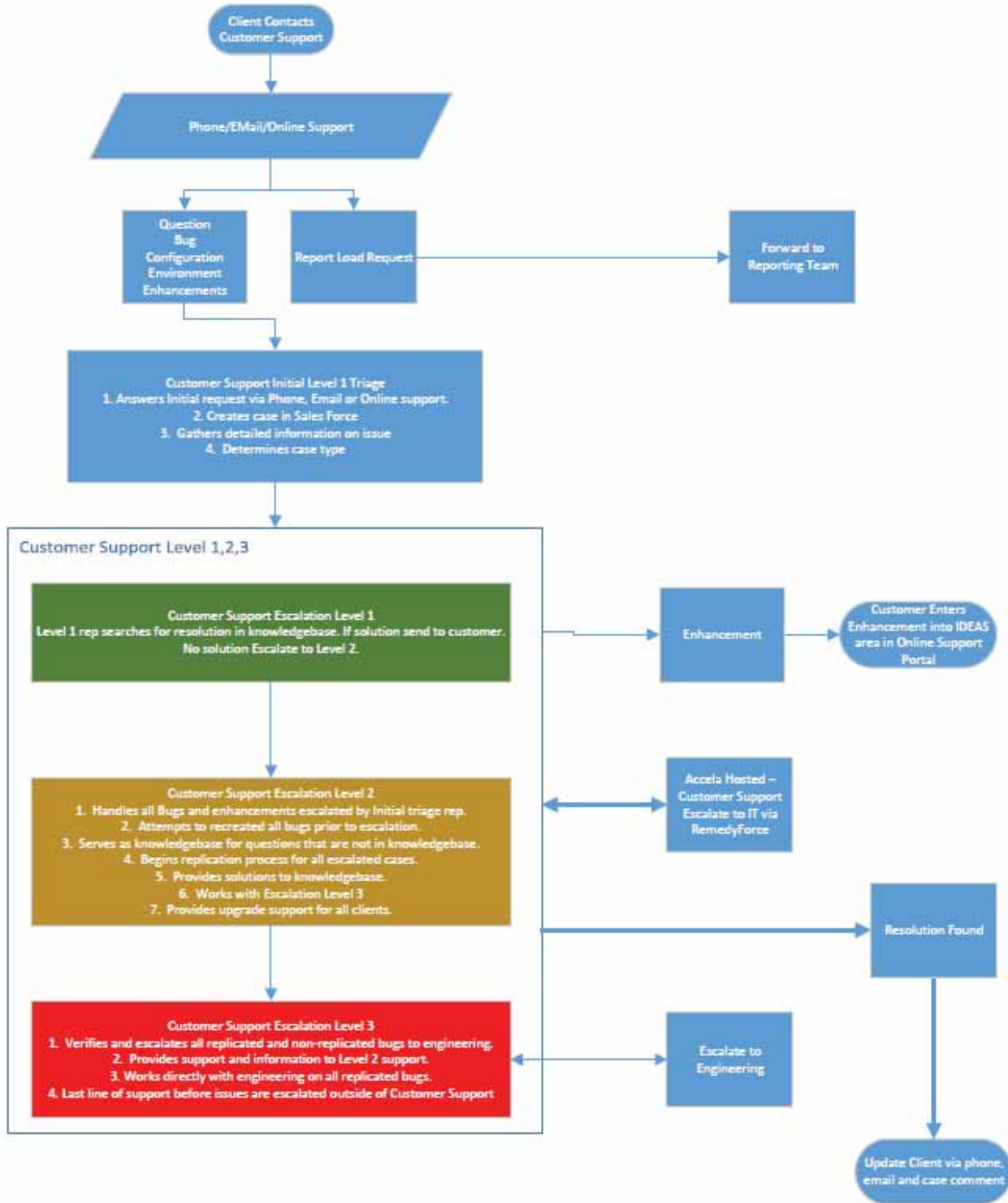
Clients choosing to run their Accela Civic Platform in the Accela Cloud will have the advantage of 24/7 monitoring support should our hosting facility experience any technical issues. The Civic Platform generates a number of logs that can be used for monitoring the health of the overall application. To perform monitoring of the systems away from the Accela stack, we use a variety of widely available third-party utilities that specialize in these areas. Listed below are monitors that Accela uses in its cloud environment to monitor its systems and report on their availability.

- ➔ Accela uses **Zenoss Core** as a central monitoring server for all Accela services and systems. Zenoss Core allows for SNMP and WMI queries and can monitor URLs for response times, response strings, and general availability. This tool frequently checks the timing of the web sites to load a page, the status of servers, and the event logs associated with these servers. Notifications by way of email and cell phone calls are sent to the production administrators who can respond accordingly. Additionally, the Big-IPs dynamically monitor all underlying members of any given pool to assess whether or not it is available to receive traffic. Should any node go down, there will be at least two notifications (and likely more) of the outage sent immediately to the Production administration group who can address the problem. Additionally, Zenoss Core can be highly customized to add in additional monitors using Nagios plug-ins. It is available from <http://community.zenoss.org/community/download> .
- ➔ For file integrity monitoring, registry monitoring, and general intrusion detection monitoring at the server level, Accela uses the open-source OSSEC monitor available from <http://www.ossec.net/> . OSSEC utilizes an agent-based deployment and can be customized to watch critical directories for any file changes.
- ➔ At the database level, Accela uses a combination of internally developed monitors and Ignite software available from <http://www.confio.com/>.

## 6.1.4 Escalation Procedures

When the Customer Support team receives an incident report, it is tracked until final resolution. The assigned Customer Support representative communicates incident progress, and email notifications are sent at critical milestones. The escalation process adheres to the following path:

- ➔ **Initiation:** All information provided to the Customer Support is entered into Accela's tracking system; the incident is assigned an identification number and a Customer Support Representative.
- ➔ **For Requests for Information:** the Customer Support representative provides the information and either closes the incidents or escalates to the appropriate resource.
- ➔ **For Usage Questions:** the Customer Support representative explains to the customer how to accomplish the task in question. The incident is then closed.
- ➔ **For Software Issues:** After confirming that the issue is not related to usage, the Customer Support representative performs an issue analysis to determine the cause of the incident.
- ➔ **For Enhancements:** The Customer Support representative gathers information about the requested enhancement, and escalates the incident to the appropriate resource within Accela, based on the request.
- ➔ **For Service Requests:** The Customer Support representative communicates and escalates the request to the appropriate Accela sales representative.
- ➔ **Analysis:** Once a software issue is reported, the Customer Support will attempt to replicate, analyze, research, and diagnose the cause of the issue. The customer may be asked to provide additional information, screenshots, or files to demonstrate the issue. Once resolved, and prior to closing the incident, the customer is asked to test the resolution. In the event that the Customer Support representative cannot resolve the issue, it is escalated to the appropriate resource.
- ➔ **Escalation to Sales:** Incident escalation to our Sales team occurs when a product enhancement or service is requested. The Sales representative will coordinate with Accela's Engineering and/or Services teams to prepare a cost estimate for the requested service. Upon customer approval, a purchase order is generated and Accela will provide the requested enhancement or service.
- ➔ **Escalation to Engineering:** Escalation to Accela's Engineering Team occurs when a modification to the existing ecosystem is required or requested. After an initial evaluation, the Engineering Team provides an estimated completion date. Our Quality Assurance staff evaluates each fix, patch, or workaround before it is sent to the Customer Support team for distribution. Once the Customer Support receives the fix, patch, or workaround, it is delivered to by e-mail or through Accela's FTP site.



**Exhibit 64: Accela Customer Support Case Lifecycle**

Accela prefers the City have internal escalation procedures to ensure that Accela’s Customer Support team does not receive multiple calls regarding the same issue. Most agencies delegate two or three individuals to handle escalation issues prior to contacting the Customer Support with the issue, however, Accela’s Customer Support will accept calls from any City staff member if it chooses to do business this way.

### 6.1.5 Response Time Commitments

As incidents are reported to the Customer Support team, incident severity is assessed based on the criteria in the table below. Reported incidents are triaged based on the impact the issue has on business operations and the severity of other issues reported. Accordingly, necessary resources are assembled to resolve the issue based on issue severity.

**Exhibit 65: Accela Customer Support Incident Severity, Response, and Resolution**

Priority	Definition	Response Goal	Resolution Goal
<b>Critical Severity - Priority 1</b>	<b>System or application is non-functional or seriously affected and there is no reasonable workaround available. E.g., Business is halted.</b>	<ul style="list-style-type: none"> <li>Confirmation of receipt within 1 business hour.</li> <li>Provide follow-up every 60 minutes when the Critical Incident is phoned into Customer Support.</li> </ul>	<b>Upon confirmation of receipt, Accela will put forth the effort to provide a workaround, fix, or estimated completion date within 72 hours after the problem has been diagnosed and/or replicated, provided there is an agency representative available to assist with issue diagnosis and testing during the resolution process.</b>
<b>High Severity - Priority 2</b>	<b>System or application is affected and there is no workaround available or the workaround is impractical. E.g., Customer cannot process payments or system response is very slow.</b>	<ul style="list-style-type: none"> <li>Confirmation of receipt within 4 business hours.</li> <li>Provide follow-up every 48 hours.</li> </ul>	<b>Accela will put forth our best effort to provide a workaround or fix or estimated completion date within 14 business days after the problem has been diagnosed and/or replicated.</b>
<b>Medium Severity - Priority 3</b>	<b>System or application feature is non-functional and a convenient workaround</b>	<ul style="list-style-type: none"> <li>Confirmation of receipt within 8 business hours.</li> </ul>	<b>Accela will put forth our best effort to provide a workaround or fix or estimated completion date</b>

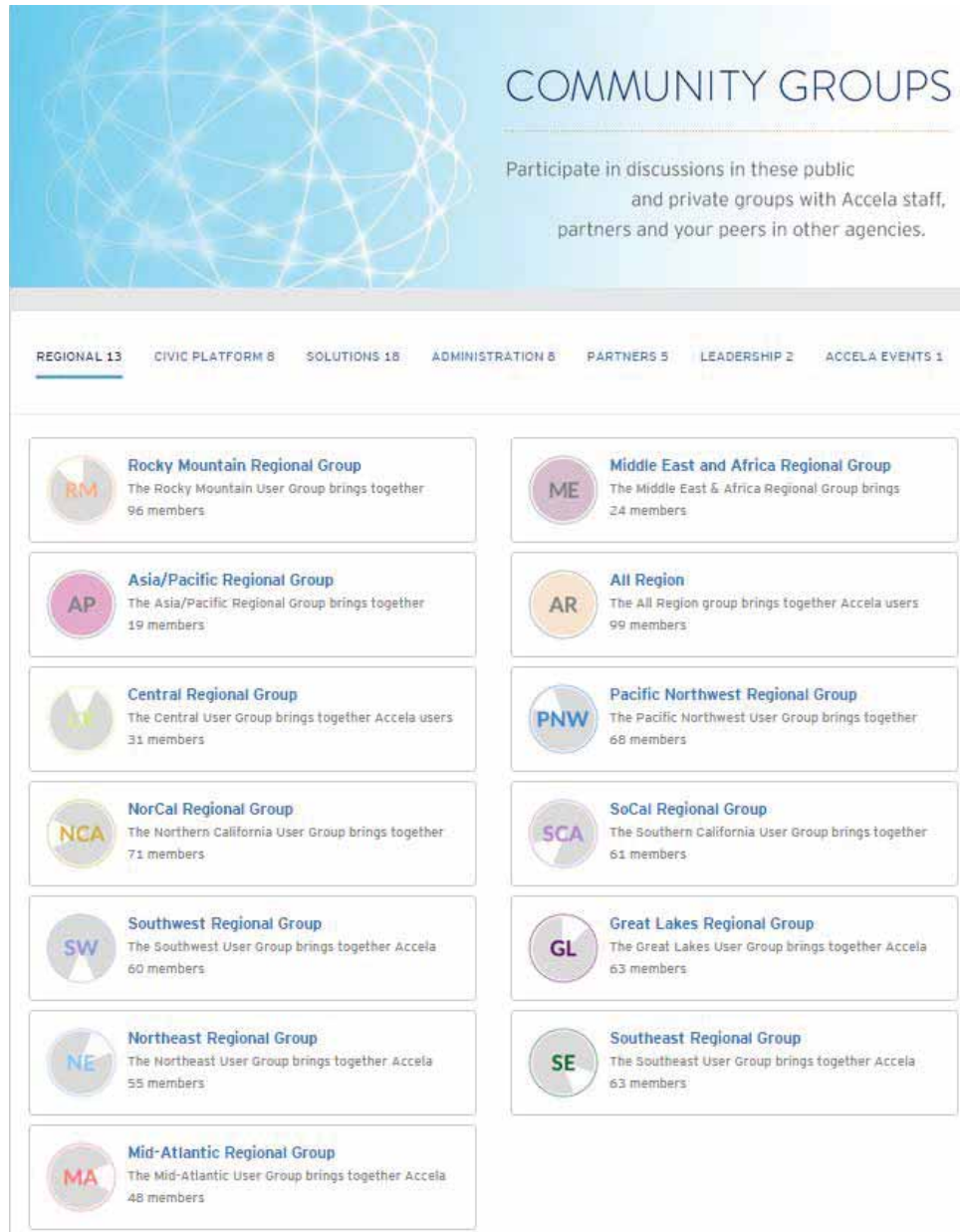
Priority	Definition	Response Goal	Resolution Goal
	exists. E.g., Non-critical feature is unavailable or requires additional user intervention.	<ul style="list-style-type: none"> <li>Provide follow-up every 7 days.</li> </ul>	within 21 business days after the problem has been diagnosed and/or replicated
Low Severity - Priority 4	System or application feature works, but there is a minor problem. E.g. a field is mislabeled or a help file is missing.	<ul style="list-style-type: none"> <li>Confirmation of receipt within 24 business hours.</li> <li>Provide follow-up every 14 days.</li> </ul>	Resolution for the issue may be released as a patch set or be incorporated into a future release of the product.

## 6.2 User Groups

*6.2 - Identify if there are solution user groups and/or user conferences.*

Accela user groups discuss products and share experiences to improve the use of their Accela products. These groups are designed as a resource for, and by, those who know the product best—the users. There is a formal meeting during Accela Engage, the annual User Conference, where each of the group members vote and name a regional lead. The regional lead then coordinates with the regional Account Manager on webinars, meetings and other notifications from the collaborations and discussions with other users in the group. The regional lead, along with other group members can determine if meeting more frequently than quarterly is an option but if not, remote meetings or conference calls are encouraged to promote collaboration and issue resolution.

Most meetings and product updates are coordinated around new releases and provide the user group members with information about the release, product demonstrations and product issues that have been addressed since the last release and new product enhancements based on feedback from the general user community. Accela posts all user group events in the events section on the Accela website (<http://www.accela.com/company/events>) and can also access additional customer forums and discussions in Accela’s Success Community.



## COMMUNITY GROUPS

Participate in discussions in these public and private groups with Accela staff, partners and your peers in other agencies.

**REGIONAL 13** CIVIC PLATFORM 8 SOLUTIONS 18 ADMINISTRATION 8 PARTNERS 5 LEADERSHIP 2 ACCELA EVENTS 1

- Rocky Mountain Regional Group**  
The Rocky Mountain User Group brings together 96 members
- Middle East and Africa Regional Group**  
The Middle East & Africa Regional Group brings 24 members
- Asia/Pacific Regional Group**  
The Asia/Pacific Regional Group brings together 19 members
- All Region**  
The All Region group brings together Accela users 99 members
- Central Regional Group**  
The Central User Group brings together Accela users 31 members
- Pacific Northwest Regional Group**  
The Pacific Northwest User Group brings together 68 members
- NorCal Regional Group**  
The Northern California User Group brings together 71 members
- SoCal Regional Group**  
The Southern California User Group brings together 61 members
- Southwest Regional Group**  
The Southwest User Group brings together Accela 60 members
- Great Lakes Regional Group**  
The Great Lakes User Group brings together Accela 63 members
- Northeast Regional Group**  
The Northeast User Group brings together Accela 55 members
- Southeast Regional Group**  
The Southeast User Group brings together Accela 63 members
- Mid-Atlantic Regional Group**  
The Mid-Atlantic User Group brings together Accela 48 members

**Exhibit 66: Participate in discussions in these public and private groups with Accela staff, partners, and agency peers**

Accela’s NorCal User Group extends from Monterey to Eureka and northwest Nevada. Mike Telliano from Reno, Nevada, is the current User Group Lead until August 2016. The NorCal User Group meets regularly virtually and in person at least twice a year as well as during Accela’s national user meeting, Engage. The most recent meeting took place in August 2015 in Los Angeles with over 800 customers and 70 agencies attending. The NorCal User Group meeting was held in Solano County, CA in December 2015. Mike Telliano can be reached at 775.745.3546 or tellianom@reno.gov.

## 6.2.1 Accela Success Community

Accela's public community website (<https://accela.force.com/success/CustomerCommunityLogin>) is where our solution experts blog about industry news, preview new features and upcoming releases. The Community is open to our customers, prospects, developers, and partners to learn about Accela solutions, discuss ideas for how to get the most out of the Civic Platform, and share tips with others.

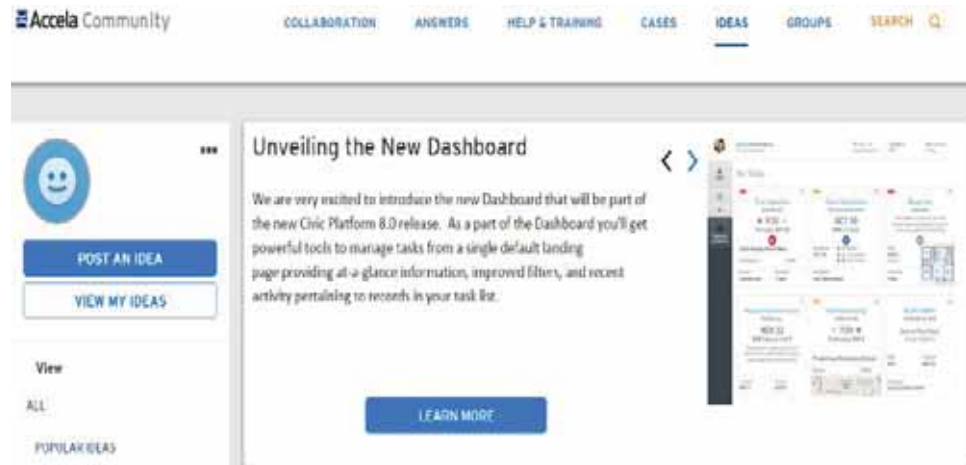
Users will also enjoy:

- ➔ **Getting everything in one place** – Single sign-on for documentation, support, articles, and conversations with other community members.
- ➔ **Finding information easily** – Search a topic and get results from all areas of the Community with enhanced search capabilities.
- ➔ **Experiencing an improved enhancement request process** – The process provides consistency, offers a look into the planning and development process and provides opportunities for users to collaborate directly with product owners.
- ➔ **Providing feedback** – Rate articles and discussion threads and vote on ideas.
- ➔ **Keeping up with what's important to you** – Follow topics and people that you are interested in.
- ➔ **Reducing your emails** – Easy-to-access profile settings give users full control of content consumption and frequency.

## 6.2.2 Accela Ideas

Ideas is a valuable resource that allows users to share ideas on potential new solution functionality with Accela and other Civic Platform users, collect feedback from others, and comment and vote on ideas proposed by others. Ideas is a key data point used by our Product Management team as part of release planning, so we encourage others to comment on and vote for your idea. Since active input and involvement is essential for all ideas, Ideas allows users to comment on and vote for (or against) ideas posted by others.

Whether you are in active implementation, have used the product for years, are a development partner, mobile user, or Accela staff, anyone using any Accela solution can submit an idea. By opening Ideas to such a large audience, we hope to better serve our users by bringing focus to features that are popular among the entire community, offer the most business value, and result in solutions users love.



**Exhibit 67: Ideas page on Success Community**

As an idea receives votes and progresses through the assessment process the status will be updated according to the following guidelines:

- ➔ **The Next Big Idea** – This status is the default initial status assigned to all submittals.
- ➔ **We built it** – This status is assigned to ideas that have made it into a release.
- ➔ **We're working on it** – This status is assigned to ideas that are in development and are expected to be included in an upcoming release.
- ➔ **Current release candidate** – This status is assigned to ideas that are actively being considered as within the potential scope for an upcoming release but are not yet in development.
- ➔ **Very interesting** – This status is assigned to ideas that are not actively being considered as within the scope for an upcoming release but which may become release candidates in the future.
- ➔ **Let us chew on it** – This status is assigned to ideas that have received at least 100 points but may not currently align with the product roadmap and are therefore not currently expected to become release candidates.
- ➔ **Under point minimum** – This status is assigned to ideas that have received fewer than 100 points.
- ➔ **Closed** – This status is assigned to ideas that have been closed due to duplication or any reasons other than that the idea has made it into a release.

We encourage users to check the status of an idea at any time by returning to the Ideas page.



### 6.2.3 Accela Engage User Conference

This annual event in August brings together hundreds of users, administrators, IT managers, and other government officials for four days of product training, app development training, breakout sessions, presentations, networking events, engaging with Customer Support and Services staff, partner solutions, exciting activities, and more. The 2015 Annual User Conference was just held in Los Angeles, California at the JW Marriott L.A. LIVE

Dynamic learning opportunities include:

- ➔ **General Session and Keynote Speakers** – Be inspired by civic technology leaders and discover what is ahead for Accela and the growing civic tech industry.
- ➔ **Breakout Sessions** – Learn about best practices and hear first-hand how customers have solved similar challenges by using game-changing technologies from Accela.
- ➔ **Hands-On Training** – Get the expertise you need so you can get the most out of your solution.
- ➔ **Expert Desks** – Meet with Accela experts and get immediate answers to all your questions as well as product support and live demos.
- ➔ **User Group Meetings** – Connect with your peers at other agencies in your region, or even internationally, and learn what they are up to.
- ➔ **Demo Theater** – Catch 15-minute demos of existing and prototype solutions that integrate with the Civic Platform.
- ➔ **Exhibit Hall** – Learn how our partners' solutions and services are extending the benefits for other agencies on the platform.

## 6.3 Training

*6.3 - Describe ongoing training resources available to users.*

Once the Civic Platform is in active use, there are some recommendations as to how to continue training for City staff. The following is a list of the sessions/classes that may be helpful. All of the sessions below would fit all solutions:

- ➔ **Detailed Process Training** – Although process training was received as part of the pre-go-live training now that your users have been processing applications they will have questions and need for more detailed process training that will show them more about their daily work and improve efficiencies.

- ➔ **New Hire Training** – As new staff comes on you will need to give them the training the other staff received. In some cases it may be best to start with a basics class – navigation, searching, basic terminology and process. Follow this up with role-based process training covering what they do in the Civic Platform and how they do it.
- ➔ **Refresher Training** – No matter how much training was completed prior to go-live the users will need some help remembering some of the basics and process. This can be done with documentation and/or a short session to take them through the Civic Platform. This can also be combined with the Detailed Process Training above.
- ➔ **Super User Training** – This session are for those who may decide that instead of burdening the IT staff with all configuration or administrative changes a small group of “super users” can be trained to make some of those for their departments or groups. This would include form design changes, field text changes, adding or taking away drop-down values etc.
- ➔ **Administrative Training** – This session would be by request of the administrators who wish to learn more advanced topics – business rules writing, report writing and management etc. This could also be a request for refresher training from the IT perspective as well.

Over and above the standard training provided for each Accela Civic Platform implementation, comprehensive product training is also provided via WebEx. Custom on-site classroom style training designed specifically for the City may also be provided.

Accela hosts regional educational seminars throughout the year and during our annual User Conference. Company newsletters and the Accela website keeps our clients up to date on new training offered, product information, and company news.

We also offer free webinars (online seminars) to current and prospective clients who wish to learn more about Accela products and their value.

## 6.4 User and Administration Documentation

*6.4 - Describe user and administration documentation that is available to the City. Provide representative samples of user and administration documentation.*

Accela provides each client with Civic Platform documentation, which the agency has acquired and is implementing. This documentation is provided at no additional charge since it is inherently part of the implementation tools and documents that are necessary to give users and system administrators’ knowledge about the facets and operation of the system.

Accela will provide the City with the one soft copy in portable document file (.pdf) format, of all documentation necessary for the Accela Civic Platform acquired under the proposed contract. The City will have the right of reproduction so that as many copies can be made of the documentation as necessary for training or subsequent purposes.

Additionally, Accela will provide the City with user training manual document templates in Microsoft Word format, which can be customized with screenshots specific to the City’s system. System Administrators and other IT professionals are provided comprehensive standard administrator manuals for the platform purchased. Additionally support documentation, notes and other reference materials are provided. Exhibit 31 below lists the available product documentation on Accela Success Community.

Document Category	Documents Comprising 8.0 Release
Civic Platform	Accela_Civic_Platform_8.0_Release_Notes_and_Addendum.pdf Accela_Civic_Platform_8.0_Administrator_Guide.pdf Accela_Civic_Platform_8.0_Concepts_Guide.pdf Accela_Civic_Platform_8.0_Configurers_Guide.pdf Accela_Civic_Platform_8.0_Installation_Guide.pdf Accela_Civic_Platform_8.0_Migration_Guide.pdf Accela_Civic_Platform_8.0_OnPremise_Administrator_Supplement.pdf Accela_Civic_Platform_8.0_Scripting_Guide.pdf Accela_Civic_Platform_8.0_User_Guide.pdf
Citizen Access	Accela_Citizen_Access_8.0_Administrator_Guide.pdf Accela_Citizen_Access_8.0_Installation_Guide.pdf Accela_Citizen_Access_8.0_SSO_Integration.zip
Civic Platform GIS	Accela_Civic_Platform_GIS_8.0_Administrator_Guide.pdf Accela_Civic_Platform_GIS_8.0_Installation_Guide.pdf
Integrations and Technical Documents	Accela_Civic_Platform_8.0_EMSE_API.doc.zip Accela_Civic_Platform_8.0_Config-data.xls Accela_Civic_Platform_8.0_Data_Dictionary.xls Accela_Civic_Platform_8.0_Data_Schema_Changes.xls Accela_Civic_Platform_8.0_Multi_Page_ERD.pdf Accela_Civic_Platform_8.0_Single_Page_ERD.pdf Accela_Civic_Platform_8.0_Portlet_Data_Mapping.xls Accela_Civic_Platform_8.0_Properties_Files.xls Accela_Civic_Platform_8.0_System_Port_Configuration.xls Accela_Civic_Platform_8.0_Special_Handles.xls

**Exhibit 68: Updated Accela Documentation**

## 6.5 Hardware & Software Specifications

*6.5 - Recommend a hardware configuration and specifications for the new system. In addition, identify the backend database that will be required. As part of Proposer response, confirm your acceptance of the City’s technical standards. If your proposed solution deviates from the standards, please justify your recommendation.*

Hardware configuration and specifications are listed in the table in the following section. Additionally, Accela has reviewed the City’s technical standards. We

confirm that our proposed solution is compliant with the standards apart from support for the Microsoft Edge browser.


## **6.6 Client/Desktop Requirements**



The proposed Accela Civic Platform represents a thin client deployment, where a typical user workstation only needs a supported web browser.


For a list of compatible browser choices, please continue to read our recommended hardware/ software specification table in the following section.


*(The remainder of this page left intentionally blank)*

**Exhibit 69: Supported Hardware and Software Specifications**


	Supported Hardware Requirements	Supported Software Requirements
<b>CIVIC PLATFORM</b>		
<b>User Workstations</b>  	Intel Core i3, 3 GHz	<ul style="list-style-type: none"> <li>Windows 7 (32 bit or 64 bit)</li> <li>Windows 8 or 8.1</li> </ul>
	4 GB RAM	<ul style="list-style-type: none"> <li>Internet Explorer 11*</li> <li>Google Chrome (latest stable version)</li> </ul> <p><i>* Accela is committed to providing the best and safest government software in the market. To do this effectively, we are dependent on the frequent and important advances of the modern web browser.</i></p> <p><i>Due to Microsoft's new browser support policy and decision to stop issuing security patches for IE 10 and earlier, Accela will only support IE 11 at this time. We rely on these modern browsers to improve security, performance, and compliance with current web standards. If your agency depends on older versions of IE for other purposes, you may want to consider a dual browser strategy.</i></p>
	20 GB free space	Silverlight 5
	Internet Connection	JRE 8
		Microsoft .NET Framework 4.5.2 to run Accela Electronic Document Review
		ComparA 4.03.1024 (to support document comparison)
		PDF Viewer/Writer (to support EDR feature) Adobe Acrobat Pro X and XI

	Supported Hardware Requirements	Supported Software Requirements
		JAWS 16 screen reader
		PayPal SHA-256 certificate for payment processing
<b>CIVIC PLATFORM</b>		
<b>Web Server</b>    <b>Accela-provided software:</b> <ul style="list-style-type: none"> <li>Java SE 7u21</li> </ul>	Multicore Intel Processor (single or multisoocket) - if Virtualized, 2vCPUs  8 GB RAM  RAID-1 (or better) storage with 20GB free space  1 Gbps Network Interface Card  Additional servers for load balancing and high availability if needed	Microsoft Windows Server 2008R2, 2012 or 2012R2(64 bit)  Railo (open source CFMX engine recommended as alternative to Adobe ColdFusion 7 Enterprise Edition)  SSL Certificate (required for PCI compliance)  Adobe ColdFusion 7 Enterprise Edition  JBoss Application Server 7.2.0, JBoss Web Sever 7.4.9 integrated with Tomcat 6.0.41, Java SE 7u67  Oracle 11g, 12c, Enterprise Edition, Standard Edition, and Standard Edition One  Microsoft SQL Server 2012 and 2014
<b>CIVIC PLATFORM</b>		
<b>Application Server</b>  	Multicore Intel Processor (single or multisoocket) - if Virtualized, 2vCPUs  8 GB RAM	Microsoft Windows Server 2008R2, 2012 or 2012R2(64 bit)  SSL Certificate (required for PCI compliance)

	Supported Hardware Requirements	Supported Software Requirements
<p><b>Accela-provided software:</b></p> <ul style="list-style-type: none"> <li>▪ JBoss 4.2.3 with integrated Tomcat 6.0.37</li> <li>▪ Java SE 7u21</li> <li>▪ Accela Report Writer</li> </ul>		
	RAID - 10 storage with 20 GB free space	<ul style="list-style-type: none"> <li>▪ Crystal Reports (CR) Server 2011 or 2013 with Enterprise 4.1</li> <li>▪ CR 11 R1 and R2; v 11 Enterprise</li> <li>▪ CR 2008 v1</li> <li>▪ CR Embedded 2008 v2 or v3</li> </ul>
	1Gbps NIC	Oracle Reports 10g and 11g
<b>CIVIC PLATFORM</b>		
<p><b>Database Server</b></p> 	Multicore Intel Processor with large (preferably multisocket) processor cache	MS SQL Server 2012, 2008 R2, or 2008
	16GB RAM	Microsoft Exchange Server 2007 SP1; 2010; or 2010 SP1
	Oracle: RAID-10 storage sufficient to hold historical data and new data Microsoft SQL Server: RID - 10 storage for database log files	


	Supported Hardware Requirements	Supported Software Requirements
	sufficient to hold peak log file generation rate	
	1 Gbps Network Interface Card (teamed aggregates recommended)	
	Use as many disk spindles (minimum 8) as possible so that disk I/O is not a bottleneck	
CITIZEN PORTAL		
<b>Web Server</b> 	Multicore Intel Processor (single or multisoocket) - if Virtualized, 2vCPUs	Microsoft Windows Server 2008R2, 2012 or 2012R2(64 bit)
	6 GB RAM	Microsoft Internet Information Server (IIS) 7.x or 8.x
	RAID-1 (or better) storage with 8GB free space	Microsoft .NET Framework 4.5.2
	1Gbps Network Interface Card	SSL Certificate (required for PCI compliance)
	Additional servers for load balancing and high availability if needed	Microsoft SQL Server 2012 and 2014
<b>Client Workstations</b>		Supported browsers include: <ul style="list-style-type: none"> <li>▪ Internet Explorer 11*</li> <li>▪ Latest stable versions of:               <ul style="list-style-type: none"> <li>→ Firefox</li> <li>→ Google Chrome</li> <li>→ Safari</li> <li>→ Opera</li> </ul> </li> </ul>





	Supported Hardware Requirements	Supported Software Requirements
		<p><i>* Accela is committed to providing the best and safest government software in the market. To do this effectively, we are dependent on the frequent and important advances of the modern web browser.</i></p> <p><i>Due to Microsoft's new browser support policy and decision to stop issuing security patches for IE 10 and earlier, Accela will only support IE 11 at this time. We rely on these modern browsers to improve security, performance, and compliance with current web standards. If your agency depends on older versions of IE for other purposes, you may want to consider a dual browser strategy.</i></p>
		Silverlight 5
		JAWS 16 screen reader
		PayPal SHA-256 Certificate for Payment Processing
<b>GIS</b>		
<p><b>Accela GIS Application Server</b> (assuming client uses ArcGIS)</p> 	Multicore Intel Processor (single or multisoocket) - if Virtualized, 2vCPUs	Microsoft Windows Server 2008R2, 2012 or 2012R2(64 bit)
	6 GB RAM	Silverlight Run Time Edition 5
	RAID-1 (or better) storage with 20 GB free space	Microsoft Internet Information Server (IIS) 8.x, 7.x
	1 Gbps Network Interface Card	Microsoft .NET Framework 4.5.2
	Additional servers for load balancing and high availability if needed	Esri ArcSDE 10.2.2, 10.2.1. 10.2 or 10.1 SP1

	Supported Hardware Requirements	Supported Software Requirements
<p><i>Requires the exact same version of Esri products including ArcSDE, Network Analyst for Server, and ArcGIS Server. Do not install multiple versions of Esri products.</i></p>		Esri ArcGIS Server Standard/ Enterprise, 10.1, 10.1 SP1, 10.2, 10.2.1. or 10.2.2
		SSL Certificate (required for PCI compliance)
		Esri ArcGIS Network Analyst for Server 10.2.2, 10.2.1. 10.2 or 10.1 SP1
<p><b>New Accela GIS Application Server</b></p> <p>This application server is required by customers that choose to deploy new Citizen Portal.</p>		Microsoft .NET Framework 4.5.2
		Microsoft Internet Information Server (IIS) 8.x, 7.x
		SSL Certificate (required for PCI compliance)
		Microsoft SQL Server 2012 and 2014

**MOBILE OFFICE**

<b>MOBILE OFFICE</b>		
<p><b>Mobile Client (laptop/tablet)</b></p> 	Intel Pentium or Intel Centrino dual core processor	Crystal Reports Runtime 2010 or 2008
	4 GB RAM	Microsoft Report Viewer 2010 or 2008
	40 GB Hard Drive	Microsoft .NET Framework 4.5.2
	Wireless Card (not necessary if Mobile Office Client use is purely offline/store and forward mode)	Esri ArcGIS Engine 10.2, 10.1 SP1, or 10 SP5, each with the Network extension
	<p>Devices tested include:</p> <ul style="list-style-type: none"> <li>▪ Motion Computing J3500 and F5v</li> <li>▪ Panasonic Toughbook CF-19 and H1</li> <li>▪ Dell E6400 XFR</li> <li>▪ Asus Eee Slate EP121</li> <li>▪ Surface Pro</li> </ul>	

	Supported Hardware Requirements	Supported Software Requirements
<b>Mobile Office Server</b> 	<ul style="list-style-type: none"> <li>▪ Panasonic Toughpad FZ-G1</li> </ul> <p>Multicore Intel Processor (single or multisoocket) - if Virtualized, 2vCPUs</p> <p>6 GB RAM</p> <p>RAID-1 (or better) storage with 10GB free space</p> <p>1 Gbps Network Interface Card</p>	<p>Microsoft SQL Server 2000; and Desktop Server Engine (MSDE) 2000, 2005 SP3, 2008 and 2012</p> <p>SSL Certificate (required for PCI compliance)</p> <p>Microsoft Internet Information Server (IIS) 8.x, 7.x</p> <p>Microsoft .NET Framework 4.5.2</p> <p>Oracle 11g, 12c, Enterprise Edition, Standard Edition, and Standard Edition One</p>
<b>IVR</b>		
<b>Application Server</b> 	<p>Multicore Intel Processor (single or multisoocket) - if Virtualized, 2vCPUs</p> <p>6 GB RAM</p> <p>RAID-1 (or better) storage with 20 GB free space</p> <p>1 Gbps Network Interface Card</p> <p>Additional servers for load balancing and high availability if needed</p>	<p>Voxeo Prophecy Server 14, VoiceXML, Premium ASR/TTS or Nuance 9</p> <p>JBoss Application Server 7.2.0, JBoss Web Sever 7.4.9 integrated with Tomcat 6.0.41, Java SE 7u67</p>

## 6.7 Test Environment

*6.7 - Describe requirements for maintaining a test environment separate from the production environment.*

If the City of Paso Robles chooses Accela hosting service, it does not have to maintain a separate testing environment locally as Accela will maintain a Cloud Test Environment.

In the event that the City deploys our proposed solution as self-hosted. We recommend the City to maintain a separate testing environment that has the equivalent capacity of its production environment.

## 6.8 Frequency of Upgrades

*6.8 - Describe the frequency that application patches and releases have been made available within the past two (2) years. In addition, clearly identify the roles and responsibilities of the City to complete updates.*

Accela is committed to the ongoing development of its products and works continuously to enhance the solutions to remain current with new technologies and consistent with best business practices. Accela spends millions of dollars each year on its research and development activities to enhance the effectiveness of its technology for its clients. Every single release advances technology and the automation it can bring our clients and their communities.

For each new release, the requirements for new enhancements and features originate from a number of sources:

- Market demand
- Customer requests
- Strategic investment
- Technology advances

The following bullets outline our typical release cycle:

- **Frequency** – Accela’s software releases typically occur annually (but may vary as requirements dictate) and other point releases as needed. The City will need someone with network administration skills and access as well as a Database Administrator or someone with credentials to access, modify and update the database. Service/feature packs are a collection of different patches, minor enhancements, or revisions that, by necessity, must be released outside of the normal release cycle and typically occur at six to eight week intervals as needed. Patches are used to correct an identified problem

Unlike some other vendors that rush to deliver multiple releases within a single year, our annual release cycle supports our platform’s maturity and our desire to release meaningful enhancements in response to market needs.

with a software program or an operating system that requires immediate action are only issued on an as-needed basis. Upgrades and patches do not affect any local customizations developed by individual agencies. A typical duration to install/implement in one environment (Dev, Test, Prod) is as follows:

- Hot Fix: 1 to 2 hours
- Service/Feature Pack: 2 to 3 hours
- Version: 4 to 6 hours

➔ **Provision of release notes** – All version upgrades, patches, etc. are provided with corresponding instructions to enable a complete understanding of the reasons and outcomes. Detailed product release notes accompany all product releases, and are alternatively available on Accela’s Success Community website for customers to review prior to installation. In addition, the following technical documentation is provided with each major release:

- Administrator Guide
- User Guide
- Installation and Configuration Guide
- Online Help
- Interface Software Development Kit

### **Accela Cloud Clients**

Accela upgrades its Cloud Test environment one month before the Accela Cloud Production environment is upgraded to the same release version. Accela upgrades its Cloud Support environment two weeks prior to upgrading the Cloud Production environment. This gives our cloud clients one full month of testing the release prior to the release being installed into the Production environment. Accela’s Cloud Environment Team has the responsibility of completing the upgrade for our clients. It is our customers’ responsibility to perform all testing and verification of the new release against their specific configuration and setup.

- ➔ Day 1 – Test Environment Upgraded
- ➔ Day 14 – Support Environment Upgraded
- ➔ Day 30 – Production Environment Upgraded

## 6.9 Document Management

*6.9 - Describe how the new system supports document management and the ability to leverage the City's investment in Laserfiche.*

Accela offers an Electronic Document Management adaptor that leverages web-services to integrate both documents and meta-data to an Agencies EDMS or RMS solution. This is one of the most common integration points for our customer base. We have integrated with all of the industry leading EDMS Solutions, Sire, LaserFiche, Filenet, Documentum, and SharePoint, using our standard EDMS adaptor.

## 6.10 Research & Development

*6.10 - Discuss your company's philosophy and approach to ongoing research and development of the new system.*

During calendar years 2010, 2011, 2012, 2013 and 2014, and development expense was \$9.5 million, \$9.8 million, \$11.4 million, \$12.7 million, and \$18.2 million respectively. These amounts represent an average of 21% of revenue in each of those years. We plan to continue to make significant investments in a broad range of and development efforts.

Accela develops most of our software products and services internally, which in turn, allows us to maintain a competitive advantage by having technical control over our products and services. It gives us the freedom to develop and deliver the enhancements that are most important, at the right time, and meet market needs. We have various activities to gather information about changing usage patterns and hardware advances that impact software design. We invest in a range of evolving technology trends that offer opportunities to deliver value to our customers and growth for the company. We are committed to and development across a wide spectrum of technologies and tools for government. Our broad focus on long-term and development presents opportunities to drive future growth in offering solutions that streamline government core processes, improve citizen engagement, and productivity.

The Accela Civic Platform is a trusted cloud-based foundation that fits the needs of government agencies of all sizes and their citizens. Our goal is to eliminate barriers between departments with solutions that drive collaboration, communication, and efficiency from desk to field. We strive to transform civic participation through mobile and cloud-based technology for better and healthier communities by bringing trust and flexibility to citizen interaction with government. The Accela Civic Platform is scalable, able to handle rapidly increasing volume and complexity that grows with growing communities. In addition to offering new cloud-based applications, open portals and robust APIs allow for easy integration with third-party solutions and support a growing industry partner ecosystem which extends and enhances the Civic Platform.

Accela has product development processes based on agile patterns that allow us to make changes quickly and offer continuous delivery. On average, new product is released six times a year. The automation and efficiency of this process is something we are continually improving.

### **6.10.1 Automation and the Civic Platform**

The Accela Civic Platform provides governments with a complete solution for citizen engagement and provides cloud- and mobile-based technologies that facilitate productivity for government workers and allow citizens to engage with their agencies 24/7. Accela Automation is the heart of the Civic Platform and is the core on which we build and innovate. The platform is continually enhanced to incorporate technology advances and we offer many integration points for development partners to innovate and build on our flexible architecture, such as integration of ePlanCheck for Electronic Document Review.

We have listened to our customers, learned from market trends and needs, and we are translating them into platform innovations in the following areas.

#### **Improved Communication**

The many channels available for civic engagement and communication have added complexity to messaging and alerts configuration. Communication Manager functionality addresses the need to engage with individuals at all levels of government, as well as the constituents they serve. Support for configurable email and text alerts keep stakeholders involved throughout the process and new enhancements will allow stakeholders to further manage and subscribe to key alerts related to both application processes and general agency communications.

#### **Enhanced GIS Capabilities**

Accela is an Esri Gold partner, and enjoys long and successful partnership with the GIS leader. GIS is native to the Civic Platform, and spatial data is a critical part of government business processes. Accela GIS enables nearly every aspect of our solutions, and we intend to continue to innovate in this area. For example, retrieving spatial information into the application during the workflow and location intelligent search capabilities provide users fast access to all transactions within a geographic area, in a selected polygon, or within user-defined distance to a map feature are examples of innovative GIS-enabled functions. Accela also connects with complementary cloud services, such as ArcGIS Online. Geofencing, geotriggers and 3D modeling are functions we are researching as possible future Civic Platform innovations.

#### **Open Data**

The open data movement has the potential to impact governing, civic engagement and government business. Today, a small fraction of agencies are actively providing open data due to the complexity and cost involved, and there

are very few implemented standards—datasets are described in very different ways.

To help agencies unlock and democratize public data, Accela introduces Cividata.com, a cloud-based open data platform to:

- ➔ Radically simplify how open data is published and managed
- ➔ Provide standard, cross-jurisdictional data in one place
- ➔ Enable developers to build and deploy civic apps across multiple jurisdictions
- ➔ Address the needs of agencies large and small
- ➔ Make these capabilities free and easy

We are expanding our use of Microsoft Azure and building upon the capabilities of CKAN to simplify dataset creation and administration for Accela customers. In addition, we intend to provide additional API's for developers to build and deploy apps incorporating datasets from multiple jurisdictions.

### **Best Practice Configurations**

Leveraging 32 years of experience working with government agencies, Accela continues to innovate around best practice configurations for our Civic Platform users. These best practices can significantly reduce the cost and shorten the implementation lifecycle for Accela solutions. Best practices can be used right out of the box, or can serve as a basis for tailored solutions to serve the unique needs of agencies.

### **High Fidelity Agency User and Citizen Experience**

Accela continues to innovate around its citizen-facing solutions as we strive to provide the most engaging and intuitive solutions for constituents doing business with government. We are building on our success with map integration to allow public users to navigate directly from the map interface. Advanced, wizard-driven interfaces will help lead users through unfamiliar application and request processes, helping to ensure that users get information throughout the application process. Mobile solutions will continue to be enhanced and expanded to put citizen-facing solutions in the hands of users, regardless of device. Finally, we will incorporate additional ways for citizens to engage citizens in all aspects of government by leveraging social media.

We have already made significant investments in platform engineering resources and we are rapidly ramping that investment. We are leveraging agile development techniques to deliver platform innovations in a rapid iterative approach.



## 6.10.2 Expanding the Accela Ecosystem

It is important to note that our business strategy includes building a vibrant community of developers and partners to build sell and provision solutions on the Accela Civic Platform. We expect partners to deliver innovative solutions and applications that provide additional value to Accela customers, and we are making the investments across all areas of our business to guide their success.

Accela maintains a three-year high-level product roadmap that provides strategic direction for all aspects of our Civic Platform. The roadmap below provides a glimpse into areas of focus for the next several years for development efforts around platform, citizen portal, and mobile.

In addition, Accela spends considerable efforts in the ongoing enhancement of our Civic Platform solutions and the best practices that support them.

Enhancements around the solutions generally encompass:

- Specific enhancement to align the solutions with applicable changes in laws and regulations
- Competitive enhancements to maintain Accela's competitive edge in the marketplace
- Enhancements to improve usability
- Enhancements to leverage the latest advancements in software and hardware technologies

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**Exhibit 70: Accela Civic Platform's High-Level Product Roadmap**

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## Section 7.0 Pricing

*The City is seeking a clear and comprehensive understanding of all costs associated with the implementation and ongoing maintenance of the proposed system. In this section, the vendor must itemize all costs associated with the implementation and ongoing maintenance. The City will evaluate proposals based on the "Total Cost to Implement (TCI)" and the "Total Cost to Operate (TCO)". The TCI will include all costs required for a successful implementation. The TCO will be calculated based on TCI plus five (5) years of annual maintenance fees. The City will provide Proposers an electronic (MS Excel) spreadsheet with a pricing template that must be completed to present pricing. The format of the pricing template is presented in Appendix C. The Proposer's Price Sheet must identify all costs required to complete a successful implementation ("One-Time Costs"). At a minimum, the Price Sheet should call out the following items:*

- *Application Module Licensing*
  - *Clearly specify licensing costs as concurrent, per user, or site*
- *3rd party products required for new system (i.e. software, hardware)*
- *Professional Services*
- *Software Installation and Configuration*
- *Conversion*
- *Training*
- *Documentation*
- *Project Management*
- *Change Management*

*The City intends to purchase the new system hardware and database software independently. However, Proposers should clearly define the hardware and software required to support the installation of Proposer's software. The City is also open to hosted solutions or cloud computing. Proposers are encouraged to identify any assumptions that will help ensure the City understands the Price Sheet. This can be done at a line item level or as a written response in addition to the Price Sheet. The City is interested in understanding and evaluating other products and services of the Proposers. If Proposers believe they have additional products and services that may be of interest to the City, please itemize that information in the Price Sheet ("Optional Proposed Modules and Services") and include a brief written response describing the offering.*

Our completed Pricing Sheet is enclosed in the following pages.

## 7.1 Subscription Pricing Notes

The pricing set forth herein reflects information generally known to Accela, supplied to Accela by the Agency and based on Accela's interpretation of the RFP. Further information gathered through detailed investigation by Accela is required before a final Statement of Work and pricing can be mutually agreed upon.

- ➔ **Payment Terms:** The initial Annual Subscription fees are invoiced upon Accela's receipt of purchase order or signed agreement. Annual Subscription fees (renewal date) are due based on the anniversary date of contract signing.
- ➔ Professional Services fees are billable based upon mutually agreed terms and condition of the Statement of Work (SOW). Travel time and expenses will be billed as incurred. Travel time will be billed at the rate stated in the SOW. Billing terms for professional services, travel time and expenses are Net 30, unless otherwise agreed upon in the SOW.
- ➔ Payment obligations hereunder are non-cancelable and any sums when paid shall be non-refundable. The Agency will be responsible for payment or reimbursement to Accela all federal, state, provincial and local taxes and duties that are applicable, except those based on Accela's net income.

Annual Subscription fees do not include hardware or equipment.

- ➔ **Alternate Terms Disclaimed:** The parties expressly disclaim any alternate terms and conditions accompanying drafts and/or purchase orders issued by Customer.

For reporting purposes, Accela Cloud clients can leverage Accela Ad-hoc report as well as Crystal Reports (version includes Crystal Reports (CR) Server 2011 or 2013 with Enterprise 4.1 or CR 11 r1 and r2 or Enterprise 2008v1 or OEM Embedded; Crystal Reports Runtime 2008 or 2010 (for Mobile Office)), however:

- ➔ Oracle Reports 11g or 10g are only supported by our San Jose, CA data center, not applicable for clients on other Cloud facilities
- ➔ MS SQL Reporting Server is not supported by Accela Cloud facilities

## 7.2 Application Module Pricing

Proposer Name: Accela

Description	# of Licenses	One-Time License Cost	Annual Maintenance Fee				Vendor Notes and/or Assumptions
			Year 1	Year 2	Year 3	Year 4	
<b>Permitting System Modules</b>							
Accela Civic Platform	20	n/a	\$40,596	\$44,626	\$46,757	\$49,094	Accela Subscription- assumes (not to exceed) 5% annual increase year over year
	-	\$ -	\$ -	\$ -	\$ -	\$ -	
	-	\$ -	\$ -	\$ -	\$ -	\$ -	
<b>Subtotal - Permitting Modules</b>		\$ -	\$40,596	\$44,626	\$46,757	\$49,094	
<b>Other Modules (i.e. system tools, reporting, etc.)</b>							
	-	\$ -	\$ -	\$ -	\$ -	\$ -	
	-	\$ -	\$ -	\$ -	\$ -	\$ -	
<b>Subtotal - Other Modules</b>		\$ -	\$ -	\$ -	\$ -	\$ -	
<b>Total Application Licensing Fees</b>		\$ -	\$40,596	\$44,626	\$46,757	\$49,094	

## 7.3 Implementation Services

**Proposer Name: Accela**

Permitting Application				
Service Category	Hours	Rate	Implementation Fee	Notes / Assumptions
Project Management	180	\$185	\$ 33,300	Standard PM time for the duration of the project
Accela Project Oversight	40	\$185	\$ 7,400	Accela Oversight and Management
Installation	16	\$185	\$ 2,960	Setup on Accela Hosted site
Configuration Analysis	240	\$185	\$ 44,400	Basic Configuration for Building, Planning, Engineering and Code (14 record types)
System Configuration	320	\$185	\$ 59,200	Will use other client examples as a starting point for the configuration and best practice templates whenever possible.
Event Management Scripts	80	\$185	\$ 14,800	Scripts to add additional Automation to business processes including interface to CA State License. Board
Interface - Business License - HDL	56	\$185	\$ 10,360	Update Business License Expiration Date in Accela
Payment Export to MUNIS	32	\$185	\$ 5,920	Extract of payment data form Accela in specified format
Report Development	72	\$185	\$ 13,320	Basic Permit, Receipt, and Finance reports in Crystal. Ad-hoc report writer will be used as much as possible for additional reports.
Training (Train the Trainer)	52	\$185	\$ 9,620	Basic training for the main power users. End users will be trained by City staff using train the trainer approach.
Accela Citizen Access Configuration	112	\$185	\$ 20,720	Permit research, Inspection scheduling and Basic over the counter permit application, payment and issuance on-line.
Accela GIS Configuration	52	\$185	\$ 9,620	Basic map integration to ESRI
Accela Mobile Office	40	\$185	\$ 7,400	Accela Mobile Apps

Service Category	Hours	Rate	Implementation Fee	Notes / Assumptions
User Acceptance Testing / Go Live Prep	80	\$185	\$ 14,800	Final system testing
Go Live Support	40	\$185	\$ 7,400	3 days on-site during go live week plus additional time over first month
	-	-	-	
<b>Subtotal - Project Management</b>	<b>1,412</b>		<b>\$ 261,220</b>	

<b>Other Modules</b>				
Service Category	Hours	Rate	Implementation Fee	Notes / Assumptions
N/A	-	\$ -	\$ 0	
<b>Subtotal - Other Modules</b>	<b>-</b>		<b>\$ 0</b>	
<b>Total - Implementation Services</b>	<b>-</b>		<b>\$ 261,220.00</b>	



## 7.4 Conversion

### Proposer Name: Accela

Category	Hours / Module	Rate	Conversion Fee	Conversion Assumptions
APO - Conversion	48	\$ 185	\$ 8,880	Initial population of Address, Parcel and Owner data
Historical Data Conversion (Permits Plus)	340	\$ 185	\$ 62,900	Permits Plus data conversion
<b>Total - Conversion</b>	<b>388</b>		<b>\$ 71,780</b>	

## 7.5 3<sup>rd</sup> Party Products

**Proposer Name: Accela**

3rd Party Product Description	Cost	Notes / Assumptions
N/A	\$ 0	
<b>Total - 3rd Party Products</b>	<b>\$ 0.00</b>	

## 7.6 Optional Offerings

**Proposer Name: Accela**

Product/Solution Description	Cost	Notes / Assumptions
N/A	\$ 0	
<b>Total - Optional Offerings</b>	<b>\$ 0.00</b>	

## 7.7 Travel

### Proposer Name: Accela

Trip Descriptions	# of Trips	Cost Per Trip	Total	Notes / Assumptions
Travel Expenses for the duration of the project	10	\$ 1,200.00	\$ 12,000	275 miles from Sacramento, HIE hotel @\$130. If we estimate an average of about 1,200 per week for expenses this would cover 10 trips during the project.
Travel Time	80	\$ 100.00	\$ 8,000	8 hours of travel time per trip @ \$100 per hour
	-	\$ -	\$ -	
<b>Total Travel Expenses</b>	<b>90</b>		<b>\$ 20,000</b>	

## 7.8 Professional Services Rate Sheet

### Proposer Name: Accela

Resource Category	Hourly Rate	Notes / Assumptions
Project Management	\$ 185.00	Blended Rate
Trainer	\$ 185.00	Blended Rate
Conversion Support	\$ 185.00	Blended Rate
Programmer	\$ 185.00	Blended Rate
Business/Systems Analyst	\$ 185.00	Blended Rate

## Section 8.0 Additional Information

*In this section, the Proposer should provide the following additional information to help the City evaluate the proposed solution and services:*






















- Provide an example of the user and administrative manuals*
- Provide an example of a training manual*
- Provide your standard software licensing and maintenance agreements*

We have included the following documents in this section to assist the City's evaluation of Accela's general qualification and experiences:

- ➔ Accela List of New Training Video and Course Guides for Civic Platform 8.0
- ➔ Accela System User Guide Table of Contents
- ➔ Accela System Administration Guide Table of Contents
- ➔ Sample Standard License Agreement
- ➔ Sample Standard Maintenance Agreement
- ➔ Sample Standard Hosting Agreement
- ➔ Center for Digital Government's Research Report on the 50 Largest US Cities' Use of Automated Land Management Systems

Accela provides both System Administrator and End User facing documentation. Due to the fact that user guides, administrative manuals and training manuals are confidential and only available to Accela clients, we have included the user guide and administration guide Table of Contents in the following pages as a high level overview for the City's reference. Additionally, we are providing a list of new video and course guides for Civic Platform 8.0 available to customers on Accela Community where there are over 100 on-demand training videos.

Exhibit 71: List of Training Video and Course Guides

Subject	Topic	Videos	Course Guide
Getting Started	8.0 Navigation Overview		
	Searching		
	Using My Searches/Filters		
	Setting Preferences		
	Glossary		
Processing and Completing	Processing Tasks		
	Creating and Processing Records		
	Updating Records		
	Processing Workflow Tasks		
	Processing Related Records		
GIS	GIS Basics		
	Selecting and Processing Objects		
	Using Layers, Measuring and Drawing on the Map		
Inspections	Processing Inspections		
	Using Checklists		
People	Processing People		
Addresses, Parcels, Owners (APO)	Processing APO		
Conditions	Processing Conditions		
Other Processes	Processing Time Accounting		
	Processing Documents and Images		

# Accela Civic Platform 8.0 User Guide

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SAMPLE

# Accela Civic Platform 8.0 Administrator Guide

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## LICENSE AGREEMENT

1. Parties
- |                                     |                  |
|-------------------------------------|------------------|
| ACCELA                              | CUSTOMER         |
| Accela, Inc.                        | _____            |
| 2633 Camino Ramon, Suite 120        | _____            |
| Bishop Ranch 3                      | _____            |
| San Ramon, California 94583         | _____            |
| Attention: Contracts Administration | Attention: _____ |
| T: 925.659.3200                     | T: _____         |
| F: 925.407.2722                     | F: _____         |
| e-Mail: contractsadmin@accela.com   | e-Mail: _____    |

This License Agreement ("LA") is intended for the exclusive benefit of the Parties; nothing herein will be construed to create any benefits, rights, or responsibilities in any other parties.

2. Term and Termination

- 2.1 Term Provided that Customer signs and returns this LA to Accela **no later than** \_\_\_\_\_, **20**\_\_\_\_\_, this LA is effective as of the date of Customer's signature ("Effective Date") and will continue until terminated as provided herein.
- 2.2 Termination Either party may terminate if the other party materially breaches this LA and, after receiving a written notice describing the circumstances of the default, fails to correct the breach within thirty (30) calendar days. Upon any termination or expiration of this LA, all rights granted to Customer are cancelled and revert to Accela.

3. Intellectual Property License

- 3.1 License The software products ("Software") listed in Exhibit A are protected under the laws of the United States and the individual states and by international treaty provisions. Accela retains full ownership in the Accela Software and grants to Customer a limited, nonexclusive, nontransferable license to use the Software, subject to the following terms and conditions:
- 3.1.1 The Software is provided for use only by Customer employees, and by Customer's contractors, agents and officials when and to extent utilized for the direct benefit of Customer.
- 3.1.2 The Software will be delivered or made available to Customer for electronic download from Accela's File Transfer Protocol ("FTP") site.
- 3.1.3 The Software may be installed on one or more computers but may not be used by more than the number of users for which the Customer has named user licenses. The Software is deemed to be in use when it is loaded into memory in a computer, regardless of whether a user is actively working with the Software. Accela may audit Customer's use of the Software to ensure that Customer has paid for an appropriate number of licenses. Should the results of any such audit indicate that Customer's use of the Software exceeds its licensed allowance, Customer agrees to pay all costs of its overuse, retroactive to the date of non-compliance, as determined using Accela's then-current pricing; any such assessed costs will be due and payable by Customer upon assessment. Customer agrees that Accela's assessment of overuse costs pursuant to this Subsection is not a waiver by Accela of any other remedies available to Accela in law and equity for Customer's unlicensed use of the Software.

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- 3.1.4 Customer may make backup copies of the Software only to protect against destruction of the Software. Customer may copy Accela's documentation only for internal use by Customer's employees.
- 3.1.5 Customer may not make any form of derivative work from the Software, although Customer is permitted to develop additional or alternative functionality for the Software using tools and/or techniques licensed to Customer by Accela.
- 3.1.6 Customer may not obscure, alter, or remove any confidentiality or proprietary rights notices.
- 3.1.7 Customer is liable to Accela for any losses incurred as the result of unauthorized reproduction or distribution of the Software which occur while the Software is in Customer's possession or control.
- 3.1.8 Customer may use the Software only to process transactions relating to properties within both its own geographical and political boundaries and may not sell, rent, assign, sublicense, lend, or share any of its rights under this LA.
- 3.1.9 Customer is entitled to receive the Software compiled (object) code and is licensed to use any data code produced through implementation and/or normal operation of the Software; Customer is not entitled to receive source code for the Software except pursuant to an Intellectual Property Escrow Agreement, which may be executed separately by the Parties. Customer may not decompile or reverse-engineer the Software.
- 3.1.10 All rights not expressly granted to Customer are retained by Accela.
- 3.1.11 If a third-party product is sold by Accela pursuant to this agreement, it shall be licensed pursuant to the terms and conditions of the manufacturer of the product and the terms and conditions of this license shall not be applicable.
- 3.2 License Warranties
- 3.2.1 Accela warrants that it has full power and authority to grant this license and that, as of the effective date of this LA, the Software does not infringe on any existing intellectual property rights of any third party. If a third party claims that the Software does infringe, Accela may, at its sole option, secure for Customer the right to continue using the Software or modify the Software so that it does not infringe. Accela will have the sole right to conduct the defense of any legal action and all negotiations for its settlement or compromise.
- 3.2.2 Accela has no obligation for any claim based upon a modified version of the Software or the combination or operation of the Software with any product, data, or apparatus not provided by Accela. Accela provides no warranty whatsoever for any third-party hardware or software products.
- 3.2.3 Except as expressly set forth herein, Accela disclaims any and all express and implied warranties, including but not necessarily limited to warranties of merchantability and fitness for a particular purpose.
- 3.3 Compensation

License Agreement (LA), Version 05262105

- 3.3.1 License Fees In exchange for the Software described hereinabove, Customer will pay to Accela the amounts indicated in Exhibit A.
- 3.3.2 Payment Terms Amounts are quoted in United States dollars and do not include applicable taxes, if any. Customer will be responsible for payment of all federal, state or provincial, and local taxes and duties, except those based on Accela's income. If Customer is exempt from certain taxes, Customer will provide Accela with an appropriate certificate of exemption. Customer will be invoiced for all amounts upon occurrence of the billing events described in Exhibit A. The payment terms of all invoices are net thirty (30) calendar days from the dates of the invoices. Accela may, at its sole discretion, suspend its obligations hereunder without penalty until payments for all past-due billings have been paid in full by Customer.

#### 4. Confidentiality

- 4.1 Definitions "Disclosing Party" and "Recipient" refer respectively to the party which discloses information and the party to which information is disclosed in a given exchange. Either Accela or Customer may be deemed Disclosing Party or Recipient depending on the circumstances of a particular communication or transfer of information. "Confidential Information" means all disclosed information relating in whole or in part to non-public data, proprietary data compilations, computer source codes, compiled or object codes, scripted programming statements, byte codes, or data codes, entity-relation or workflow diagrams, financial records or information, client records or information, organizational or personnel information, business plans, or works-in-progress, even where such works, when completed, would not necessarily comprise Confidential Information. The foregoing listing is not intended by the Parties to be comprehensive, and any information which Disclosing Party marks or otherwise designates as "Confidential" or "Proprietary" will be deemed and treated as Confidential Information. Information which qualifies as "Confidential Information" may be presented to Recipient in oral, written, graphic, and/or machine-readable formats. Regardless of presentation format, such information will be deemed and treated as Confidential Information. Notwithstanding, the following specific classes of information are not "Confidential Information" within the meaning of this Section:
- a) information which is in Recipient's possession prior to disclosure by Disclosing Party;
  - b) information which is available to Recipient from a third party without violation of this LA or Disclosing Party's intellectual property rights;
  - c) information disclosed pursuant to Subsection 4.4 below;
  - d) information which is in the public domain at the time of disclosure by Disclosing Party, or which enters the public domain from a source other than Recipient after disclosure by Disclosing Party;
  - e) information which is subpoenaed by governmental or judicial authority; and
  - f) information subject to disclosure pursuant to a state's public records laws.
- 4.2 Confidentiality Term The obligations described in this Section commence on the Effective Date and will continue until two (2) years following any termination or expiration of this LA ("Confidentiality Term").
- 4.3 Confidentiality Obligations During the Confidentiality Term, Recipient will protect the confidentiality of Confidential Information using the same degree of care that it uses to protect its own information of similar importance, but will in any case use no less than a reasonable degree of care to protect Confidential Information. Recipient will not directly or indirectly disclose Confidential Information or any part thereof to any third party without Disclosing Party's advance express written authorization to do so. Recipient may disclose Confidential Information only to its employees or agents under its control and direction in the normal course of its business and only on a need-to-know basis. In responding to a request for Confidential Information, Recipient will cooperate with Disclosing Party, in a timely fashion

and in a manner not inconsistent with applicable laws, to protect the Confidential Information to the fullest extent possible.

4.4 Publicity During the term of this LA, including the term of any amendment hereto, Accela may publicly disclose its ongoing business relationship with Customer. Such disclosures may indicate Customer's identity and the Accela product(s) and services provided or contracted to be provided to Customer. These disclosures may include press releases or other communications to media, display on Accela web sites, or use in other marketing activities, but will not include non-public information or indicate Customer's express endorsement of Accela's products or services without Customer's prior written authorization.

5. Other Terms and Conditions

5.1 Dispute Resolution This LA is governed by the laws of the State of California. Any controversy or claim arising out of or relating to this LA, or the breach thereof, will be settled by arbitration administered by the American Arbitration Association under its Commercial Arbitration Rules, including the Emergency Interim Relief Procedures, and judgment on the award rendered by the arbitrator may be entered in any court having jurisdiction thereof. The place of arbitration will be Santa Clara County, California. Either party may apply to the arbitrator for injunctive relief until the arbitration award is rendered or the controversy is otherwise resolved. Either party also may, without waiving any remedy under this LA, seek from any court having jurisdiction any interim or provisional relief that is necessary to protect the rights or property of that party, pending the arbitrator's determination of the merits of the controversy. Each party will initially bear its own expenses and an equal share of the costs of the arbitration, but the prevailing party may be awarded its expenses, reasonable attorneys' fees, and costs. The failure of either party to object to a breach of this LA will not prevent that party from thereafter objecting to that breach or any other breach of this LA.

5.2 Removal and Destruction of Software Within ten (10) business days following termination of this LA by either Party, Customer will remove all copies of the Software from those computer systems which it owns or controls and will destroy all media which contain copies of the Software or portions thereof. Customer will certify said removal and destruction to Accela within fifteen (15) business days following termination of this LA.

5.3 Assignment Accela may assign its rights and obligations hereunder for purposes of financing or pursuant to corporate transactions involving the sale of all or substantially all of its stock or assets.

5.4 Survival The following provisions will survive the termination or expiration of this LA: Section 3.3 and all subsections thereof, as to Customer's obligation to pay any fees accrued or due at the time of termination or expiration; Section 4 and all subsections thereof; and Section 5, and all subsections thereof.

5.5 Alternate Terms Disclaimed The parties expressly disclaim any alternate terms and conditions accompanying drafts and/or purchase orders issued by Customer.

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5.6 Severability and Amendment If any particular provision of this LA is determined to be invalid or unenforceable, that determination will not affect the other provisions of this LA, which will be construed in all respects as if the invalid or unenforceable provision were omitted. No extension, modification, or amendment of this LA will be effective unless it is described in writing and signed by the Parties.

**ACCELA**

**CUSTOMER**

By: \_\_\_\_\_  
(Signature)

By: \_\_\_\_\_  
(Signature)

\_\_\_\_\_  
(Print Name)

\_\_\_\_\_  
(Print Name)

Its \_\_\_\_\_  
(Title)

Its \_\_\_\_\_  
(Title)

Dated: \_\_\_\_\_  
(Month, Day, Year)

Dated: \_\_\_\_\_  
(Month, Day, Year)

**Exhibit Follows.**

SAMPLE

EXHIBIT A

Deliverables	Quantity	Fees
Total of Fees		

License Fees are fixed-price deliverables for which full payment is due upon signing.

SAMPLE

License Agreement (LA), Version 05262105

## MAINTENANCE AGREEMENT

1. Parties
- |                                     |                  |
|-------------------------------------|------------------|
| ACCELA                              | CUSTOMER         |
| Accela, Inc.                        | _____            |
| 2633 Camino Ramon, Suite 500        | _____            |
| Bishop Ranch 3                      | _____            |
| San Ramon, California 94583         | _____            |
| Attention: Contracts Administration | Attention: _____ |
| T: 925.659.3200                     | T: _____         |
| F: 925.407.2722                     | F: _____         |
| e-Mail: contractsadmin@accela.com   | e-Mail: _____    |

This Maintenance Agreement ("MA") is intended for the exclusive benefit of the Parties; nothing herein will be construed to create any benefits, rights, or responsibilities in any other parties.

2. Term and Termination

2.1 Term Provided that Customer signs and returns this MA to Accela **no later than** \_\_\_\_\_, 201\_\_, this MA is effective as of the date of Customer's signature and will continue for a period of \_\_\_\_\_ (\_\_\_\_) years. Customer may elect to continue its maintenance coverage for additional annual terms by paying to Accela the fees associated with such terms when these are due; said fees will not increase by more than ten percent (10%) from the maintenance fees for the preceding term. Should Customer fail to renew its maintenance coverage or pay the applicable fees, Accela reserves the right to withhold all support. If Customer resumes maintenance coverage after one or more periods without such coverage, Customer will pay an amount equivalent to one hundred ten percent (110%) of all maintenance fees attributable to the period(s) without coverage, as such fees are calculated based upon pricing in effect at the time of resumption of maintenance coverage.

2.2 Termination Either party may terminate if the other party materially breaches this MA and, after receiving a written notice describing the circumstances of the default, fails to correct the breach within thirty (30) calendar days. Upon any termination or expiration of this MA, all rights granted to Customer are cancelled and revert to Accela.

3. Scope of Maintenance

3.1 Maintenance Services

3.1.1 Telephone Support Accela will provide Customer with a telephone number to contact Accela Customer Support, Accela's live technical support facility, which is available from 4:00 a.m. until 6:00 p.m. Pacific time Monday through Friday, excluding Accela's observed holidays.

3.1.2 E-Mail Support Accela will provide Customer with one or more electronic mail addresses to which Customer may submit routine or non-critical support requests, which Accela will address during its regular business hours.

3.1.3 Online Support Accela will provide Customer with access to archived software updates and other technical information in Accela's online support databases, which are continuously available.

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- 3.1.4 Remote Support When required to properly resolve a maintenance request, Accela will provide remote assistance to Customer via a web conferencing environment or another mutually-acceptable remote communications method.
- 3.1.5 On-Site Support If Customer does not wish for Accela to resolve its maintenance requests remotely, Accela will provide on-site assistance to Customer at Accela's then-current time-and-materials rates. In addition to these charges, Customer will compensate Accela for associated airfare, lodging, rental transportation, meals, and other incidental expenses as such expenses accrue.
- 3.1.6 Software Updates Accela will provide revisions of and enhancements to maintained software products to Customer as such updates are generally-released by Accela. Software updates will be delivered or made available to Customer for electronic download from Accela's File Transfer Protocol ("FTP") site.

### 3.2 Maintenance Limitations

- 3.2.1 Limitations Generally The following are not covered by this MA, but may be separately available at rates and on terms which may vary from those described herein:
- a) Services required due to misuse of the Accela-maintained software products;
  - b) Services required due to software corrections, customizations, or modifications not developed or authorized by Accela;
  - c) Services required by Customer to be performed by Accela outside of Accela's usual working hours;
  - d) Services required due to external factors including, but not necessarily limited to, Customer's use of software or hardware not authorized by Accela;
  - e) Services required due to the operation of interfaces between the Accela-maintained software products and other software products or systems, even where such interfaces were provided or implemented by Accela;
  - f) Services required to resolve or work-around conditions which cannot be reproduced in Accela's support environment;
  - g) Services which relate to tasks other than maintenance of Customer's existing implementation and configuration of the Accela-maintained software products including, but not necessarily limited to, enhancing or adapting such products for specific operating environments;
  - h) Services requested by Customer to implement software updates provided by Accela pursuant to this MA; and
  - i) New or additional applications, modules, or functionality released by Accela during the term of this MA.

- 3.2.2 Legacy Releases Accela will provide maintenance support for the current release of each of its maintained software applications and for the release immediately preceding such current release. All other releases are deemed to be "Legacy Releases". Accela will respond to maintenance requests concerning Legacy Releases only using currently-available information. Services requiring additional research, engineering-level support, or coding or programming by Accela will not be provided pursuant to this MA, but may be separately available at rates and on terms which may vary from those described herein.

- 3.3 Warranty Accela will commence and complete the maintenance obligations described in this MA in a good and workmanlike manner, consistent with the practices and standards of care generally-accepted within and expected of Accela's industry, to ensure that the operation of the maintained software products

does not materially differ from documented specifications. Accela may make repeated efforts within a reasonable time period to resolve maintenance requests. When a maintenance request cannot be resolved, Customer's exclusive remedy will be damages in an amount equal to the total of maintenance fees paid to Accela for the defective or non-conforming software products for the twelve (12) calendar months immediately preceding Customer's maintenance request.

### 3.4 Compensation

3.4.1 Maintenance Fees In exchange for the Maintenance Services described hereinabove, Customer will pay to Accela the amounts indicated in Exhibit A.

3.4.2 Payment Terms Amounts are quoted in United States dollars and do not include applicable taxes, if any. Customer will be responsible for payment of all federal, state or provincial, and local taxes and duties, except those based on Accela's income. If Customer is exempt from certain taxes, Customer will provide Accela with an appropriate certificate of exemption. Customer will be invoiced for all amounts upon occurrence of the billing events described in Exhibit A. The payment terms of all invoices are net thirty (30) calendar days from the dates of the invoices. Accela may, at its sole discretion, suspend its obligations hereunder without penalty until payments for all past-due billings have been paid in full by Customer.

## 4. Confidentiality

4.1 Definitions "Disclosing Party" and "Recipient" refer respectively to the party which discloses information and the party to which information is disclosed in a given exchange. Either Accela or Customer may be deemed Disclosing Party or Recipient depending on the circumstances of a particular communication or transfer of information. "Confidential Information" means all disclosed information relating in whole or in part to non-public data, proprietary data compilations, computer source codes, compiled or object codes, scripted programming statements, byte codes, or data codes, entity-relation or workflow diagrams, financial records or information, client records or information, organizational or personnel information, business plans, or works-in-progress, even where such works, when completed, would not necessarily comprise Confidential Information. The foregoing listing is not intended by the Parties to be comprehensive, and any information which Disclosing Party marks or otherwise designates as "Confidential" or "Proprietary" will be deemed and treated as Confidential Information. Information which qualifies as "Confidential Information" may be presented to Recipient in oral, written, graphic, and/or machine-readable formats. Regardless of presentation format, such information will be deemed and treated as Confidential Information. Notwithstanding, the following specific classes of information are not "Confidential Information" within the meaning of this Section:

- a) information which is in Recipient's possession prior to disclosure by Disclosing Party;
- b) information which is available to Recipient from a third party without violation of this MA or Disclosing Party's intellectual property rights;
- c) information disclosed pursuant to Subsection 4.4 below;
- d) information which is in the public domain at the time of disclosure by Disclosing Party, or which enters the public domain from a source other than Recipient after disclosure by Disclosing Party;
- e) information which is subpoenaed by governmental or judicial authority; and
- f) information subject to disclosure pursuant to a state's public records laws.

4.2 Confidentiality Term The obligations described in this Section commence on the Effective Date and will continue until two (2) years following any termination or expiration of this MA ("Confidentiality Term").

4.3 Confidentiality Obligations During the Confidentiality Term, Recipient will protect the confidentiality of Confidential Information using the same degree of care that it uses to protect its own information of similar

importance, but will in any case use no less than a reasonable degree of care to protect Confidential Information. Recipient will not directly or indirectly disclose Confidential Information or any part thereof to any third party without Disclosing Party's advance express written authorization to do so. Recipient may disclose Confidential Information only to its employees or agents under its control and direction in the normal course of its business and only on a need-to-know basis. In responding to a request for Confidential Information, Recipient will cooperate with Disclosing Party, in a timely fashion and in a manner not inconsistent with applicable laws, to protect the Confidential Information to the fullest extent possible.

- 4.4 Publicity During the term of this MA, including the term of any amendment hereto, Accela may publicly disclose its ongoing business relationship with Customer. Such disclosures may indicate Customer's identity and the Accela product(s) and services provided or contracted to be provided to Customer. These disclosures may include press releases or other communications to media, display on Accela web sites, or use in other marketing activities, but will not include non-public information or indicate Customer's express endorsement of Accela's products or services without Customer's prior written authorization.

## 5. Other Terms and Conditions

- 5.1 Customer Obligations As required, Customer will provide Accela with appropriate access to Customer's facilities, data systems, and other resources. If security restrictions impair such access, Customer acknowledges that some maintenance services hereunder may not be provided to Customer. It is Customer's sole responsibility to maintain current backup copies of its data and of its implementation of Accela's software products. If Customer's failure to create proper backups substantially increases the difficulties of any remedial actions by Accela hereunder, Accela reserves the right to charge Customer for any extra work reasonably-attributable to such increased difficulty, as calculated at Accela's then-current time-and-materials rates.
- 5.2 Proprietary Rights The remedial methods, software updates, and product information provided to Customer pursuant to this MA are protected under the laws of the United States and the individual states and by international treaty provisions. Accela retains full ownership in such items and grants to Customer a limited, nonexclusive, nontransferable license to use the items, subject to the terms and conditions of this MA and other agreements between Accela and Customer.
- 5.3 Limitation of Liability Accela provides no warranty whatsoever for any third-party hardware or software products. If a third-party product is supplied by Accela, no support for any third party product is provided, unless an addendum is attached hereto, identifying the product and specifying the terms and conditions of any support. Third-party applications which utilize or rely upon the application services may be adversely affected by remedial or other actions performed pursuant to this MA; Accela bears no liability for and has no obligation to remedy such effects. Except as set forth herein, Accela provides all Maintenance Services "as is" without express or implied warranty of any kind regarding the character, function, capabilities, or appropriateness of such services or deliverables. To the extent not offset by its insurance coverage and to the maximum extent permitted by applicable laws, in no event will Accela's cumulative liability for any general, incidental, special, compensatory, or punitive damages whatsoever suffered by Customer or any other person or entity exceed the fees paid to Accela by Customer during the twelve (12) calendar months immediately preceding the circumstances which give rise to such claim(s) of liability, even if Accela or its agents have been advised of the possibility of such damages.
- 5.4 Force Majeure If either party is delayed in its performance of any obligation under this MA due to causes or effects beyond its control, that party will give timely notice to the other party and will act in good faith to resume performance as soon as practicable.

Maintenance Agreement (MA), Version 05262015

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- 5.5 Dispute Resolution This MA is governed by the laws of the State of California. Any controversy or claim arising out of or relating to this MA, or the breach thereof, will be settled by arbitration administered by the American Arbitration Association under its Commercial Arbitration Rules, including the Emergency Interim Relief Procedures, and judgment on the award rendered by the arbitrator may be entered in any court having jurisdiction thereof. The place of arbitration will be Santa Clara County, California. Either party may apply to the arbitrator for injunctive relief until the arbitration award is rendered or the controversy is otherwise resolved. Either party also may, without waiving any remedy under this MA, seek from any court having jurisdiction any interim or provisional relief that is necessary to protect the rights or property of that party, pending the arbitrator's determination of the merits of the controversy. Each party will initially bear its own expenses and an equal share of the costs of the arbitration, but the prevailing party may be awarded its expenses, reasonable attorneys' fees, and costs. The failure of either party to object to a breach of this MA will not prevent that party from thereafter objecting to that breach or any other breach of this MA.
- 5.6 Assignment Accela may assign its rights and obligations hereunder for purposes of financing or pursuant to corporate transactions involving the sale of all or substantially all of its stock or assets. Accela may subcontract with qualified third parties to provide portions of the Maintenance Services described hereinabove.
- 5.7 Survival The following provisions will survive the termination or expiration of this MA: Section 2.1, as to Customer's obligation to pay any fees associated with a lapse in maintenance coverage upon resumption of such coverage; Section 3.3, as to limitation of remedy; Section 3.4 and all subsections thereof, as to Customer's obligation to pay any fees accrued or due at the time of termination or expiration; Section 4 and all subsections thereof; and Section 5 and all subsections thereof with the exceptions of Subsections 5.1 and 5.4.
- 5.8 Alternate Terms Disclaimed The parties expressly disclaim any alternate terms and conditions accompanying drafts and/or purchase orders issued by Customer.
- 5.9 Severability and Amendment If any particular provision of this MA is determined to be invalid or unenforceable, that determination will not affect the other provisions of this MA, which will be construed in all respects as if the invalid or unenforceable provision were omitted. No extension, modification, or amendment of this MA will be effective unless it is described in writing and signed by the Parties.

**ACCELA**

**CUSTOMER**

By: \_\_\_\_\_  
(Signature)

By: \_\_\_\_\_  
(Signature)

\_\_\_\_\_  
(Print Name)

\_\_\_\_\_  
(Print Name)

Its \_\_\_\_\_  
(Title)

Its \_\_\_\_\_  
(Title)

Dated: \_\_\_\_\_  
(Month, Day, Year)

Dated: \_\_\_\_\_  
(Month, Day, Year)

**Exhibit Follows.**

**END OF DOCUMENT**

Maintenance Agreement (MA), Version 05262015

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EXHIBIT A

Deliverables	Fees
<b>Total of Fees</b>	

Maintenance Fees are fixed-price deliverables for which full payment is due upon signing.

END OF DOCUMENT

SAMPLE

Maintenance Agreement (MA), Version 05262015

## HOSTING AGREEMENT

1. Parties
- |                                     |                  |
|-------------------------------------|------------------|
| ACCELA                              | CUSTOMER         |
| Accela, Inc.                        | _____            |
| 2633 Camino Ramon, Suite 120        | _____            |
| Bishop Ranch 3                      | _____            |
| San Ramon, California 94583         | _____            |
| Attention: Contracts Administration | Attention: _____ |
| T: 925.659.3200                     | T: _____         |
| F: 925.407.2722                     | F: _____         |
| e-Mail: contractsadmin@accela.com   | e-Mail: _____    |

This Hosting Agreement ("HA") is intended for the exclusive benefit of the Parties; nothing herein will be construed to create any benefits, rights, or responsibilities in any other parties.

2. Term and Termination

- 2.1 Term Provided that Customer signs and returns this HA to Accela **no later than** \_\_\_\_\_, 201\_\_\_\_, this HA is effective as of the date of Customer's signature and will continue for a period of \_\_\_\_\_ (\_\_\_\_) years. Customer may elect to continue these hosting services for an additional annual term by paying to Accela the fees associated with said additional term when these are due. Such fees will be calculated as the prior term's annual fees plus an increase of five percent (5%).
- 2.2 Termination Either party may terminate if the other party materially breaches this HA and, after receiving a written notice describing the circumstances of the default, fails to correct the breach within thirty (30) calendar days. Upon any termination or expiration of this HA, all rights granted to Customer are cancelled and revert to Accela.

3. Hosting Services

- 3.1 Scope of Hosting Services Accela will provide the hosting services described in this Section and in Exhibit A for the following software products ("Hosted Applications"):
- \_\_\_\_\_
- 3.2 System Administration and Security The Hosted Applications will be hosted by Accela on Accela-owned equipment at a physically-secure commercial third-party hosting facility. Accela will perform system administration duties as required to maintain the service levels described below and to facilitate timely restoration of Customer's data and operations, if necessary, following unanticipated interruptions of the Hosted Applications. Accela will implement suitable network security measures to minimize the likelihood of unanticipated interruptions of the Hosted Applications.
- 3.3 Infrastructure Availability Accela will endeavor to provide Customer with no less than twenty-four (24) hours' notice prior to live-production Hosted Applications unavailability due to planned maintenance (other than during Accela's standard maintenance window between the hours of 9:00 PM [21:00] Thursday and 1:00 AM [1:00] Friday Pacific time); Accela will endeavor to provide as much notice as is practicable under the circumstances for updates and fixes which must be applied on a more urgent basis. Accela will provide five (5) business days' notice prior to any planned network, server hardware, operating environment, or database modifications of a material nature. Excluding the foregoing events, Accela warrants that the Hosted Applications will be generally-available no less than ninety-nine point nine

percent (99.9%) of each calendar month. For each calendar month during which the availability of the Hosted Applications does not achieve the established standard, Accela will provide a credit to Customer's account as liquidated damages calculated pursuant to Subsection 3.5 below, provided that the substandard availability is identified by Customer in writing or by e-mail to Accela, can be objectively verified, and the Hosted Application is being used in live-production. Credits accumulated pursuant to this Section may be applied to additional Accela products and/or services, but will not be refunded to Customer.

3.4 Warranty Accela will commence and complete the obligations described in this HA in a good and workmanlike manner, consistent with the practices and standards of care generally-accepted within and expected of Accela's industry, to ensure that the operation and availability of the Hosted Applications does not materially differ from documented specifications. Accela may make repeated efforts within a reasonable time period to resolve operational issues. When an operational issue cannot be resolved, Customer's exclusive remedy will be damages in an amount equal to the total of hosting fees paid to Accela for the defective or non-conforming software products amongst the Hosted Applications during the twelve (12) calendar months immediately preceding the occurrence of the unresolved operational issue.

3.5 System Availability and Performance The performance requirements for the hosted system, excluding planned maintenance downtime, are set forth below. Uptime is calculated on a calendar month basis as  $U = O / (M - P) * 100$ , where U is Uptime as used in the table below, O is the amount of operational uptime for the hosted system during a given calendar month, M is the number of minutes in said calendar month, and P is the number of minutes of planned downtime during said calendar month.

<u>Uptime</u>	<u>Credit</u>
Greater than or equal to 99.9%	None
Less than 99.9% but greater than or equal to 99.0%	15% of pro-rated monthly hosting fees
Less than 99.0% but greater than or equal to 95.0%	35% of pro-rated monthly hosting fees
Less than 95.0%	100% of pro-rated monthly hosting fees

4. Customer Property Customer warrants that it exclusively owns its data and that it has both the right and the authority to provide such data to Accela. Customer retains full ownership of its data and grants to Accela a limited, nonexclusive, nontransferable license to use said data only to perform Accela's obligations in accordance with the terms and conditions of this HA. Throughout the term of this HA, upon the request of Customer, Accela will provide Customer with:

- (i) a copy of its data in an Oracle database dump file, not more than once per calendar quarter,
- (ii) an APO property conversion upload, not more than twice per annual term, and
- (iii) a Crystal Report placement, not more than ten (10) times per annual term.

Within thirty (30) calendar days following termination or expiration of this HA, Customer may request that Accela provide a complete copy of Customer's data, as such may be updated or modified by Customer's use of the Hosted Applications, to Customer in a machine-readable format. Accela will comply in a timely manner with such request, provided that Customer a) pays all costs of and associated with such copying, as calculated at Accela's then-current time-and-materials rates; and b) pays all unpaid amounts due to Accela. If Customer elects to transition to another hosting option, including self-hosting or hosting by third parties, Accela will assist Customer during such transition to ensure uninterrupted access to Customer's data and the Hosted Applications, provided that Customer pays all costs of and associated with such services, as calculated at then current hosting and/or time-and-materials rates, as applicable.

Hosting Agreement (HA), Version 05262015

#### 4. Compensation

- 4.1 Hosting Fee In exchange for the Hosting Services described hereinabove, Customer will pay to Accela a hosting fee of \_\_\_\_\_ (\$\_\_\_\_\_). Said hosting fee is a fixed-price deliverable for which full payment is due upon signing.
- 4.2 Payment Terms Amounts are quoted in United States dollars and do not include applicable taxes, if any. Customer will be responsible for payment of all federal, state or provincial, and local taxes and duties, except those based on Accela's income. If Customer is exempt from certain taxes, Customer will provide Accela with an appropriate certificate of exemption. Customer will be invoiced for all amounts upon occurrence of the billing events described herein. The payment terms of all invoices are net thirty (30) calendar days from the dates of the invoices. Accela may, at its sole discretion, suspend its obligations hereunder without penalty until payments for all past-due billings have been paid in full by Customer.

#### 5. Confidentiality

- 5.1 Definitions "Disclosing Party" and "Recipient" refer respectively to the party which discloses information and the party to which information is disclosed in a given exchange. Either Accela or Customer may be deemed Disclosing Party or Recipient depending on the circumstances of a particular communication or transfer of information. "Confidential Information" means all disclosed information relating in whole or in part to non-public data, proprietary data compilations, computer source codes, compiled or object codes, scripted programming statements, byte codes, or data codes, entity-relation or workflow diagrams, financial records or information, client records or information, organizational or personnel information, business plans, or works-in-progress, even where such works, when completed, would not necessarily comprise Confidential Information. The foregoing listing is not intended by the Parties to be comprehensive, and any information which Disclosing Party marks or otherwise designates as "Confidential" or "Proprietary" will be deemed and treated as Confidential Information. Information which qualifies as "Confidential Information" may be presented to Recipient in oral, written, graphic, and/or machine-readable formats. Regardless of presentation format, such information will be deemed and treated as Confidential Information. Notwithstanding, the following specific classes of information are not "Confidential Information" within the meaning of this Section:
- a) information which is in Recipient's possession prior to disclosure by Disclosing Party;
  - b) information which is available to Recipient from a third party without violation of this HA or Disclosing Party's intellectual property rights;
  - c) information disclosed pursuant to Subsection 6.4 below;
  - d) information which is in the public domain at the time of disclosure by Disclosing Party, or which enters the public domain from a source other than Recipient after disclosure by Disclosing Party;
  - e) information which is subpoenaed by governmental or judicial authority; and
  - f) information subject to disclosure pursuant to a state's public records laws.
- 5.2 Confidentiality Term The obligations described in this Section commence on the Effective Date and will continue until two (2) years following any termination or expiration of this HA ("Confidentiality Term").
- 5.3 Confidentiality Obligations During the Confidentiality Term, Recipient will protect the confidentiality of Confidential Information using the same degree of care that it uses to protect its own information of similar importance, but will in any case use no less than a reasonable degree of care to protect Confidential Information. Recipient will not directly or indirectly disclose Confidential Information or any part thereof to any third party without Disclosing Party's advance express written authorization to do so. Recipient may disclose Confidential Information only to its employees or agents under its control and direction in the normal course of its business and only on a need-to-know basis. In responding to a request for Confidential Information, Recipient will cooperate with Disclosing Party, in a timely fashion and in a



manner not inconsistent with applicable laws, to protect the Confidential Information to the fullest extent possible.

- 5.4 Publicity During the term of this HA, including the term of any amendment hereto, Accela may publicly disclose its ongoing business relationship with Customer. Such disclosures may indicate Customer's identity and the Accela product(s) and services provided or contracted to be provided to Customer. These disclosures may include press releases or other communications to media, display on Accela web sites, or use in other marketing activities, but will not include non-public information or indicate Customer's express endorsement of Accela's products or services without Customer's prior written authorization.

## 6. Other Terms and Conditions

- 6.1 Limitation of Liability Accela provides no warranty whatsoever for any third-party hardware or software products. Third-party applications which utilize or rely upon the Application Services may be adversely affected by remedial or other actions performed pursuant to this HA; Accela bears no liability for and has no obligation to remedy such effects. Except as set forth herein, Accela provides all Hosting Services "as is" without express or implied warranty of any kind regarding the character, function, capabilities, or appropriateness of such services or deliverables. To the extent not offset by its insurance coverage and to the maximum extent permitted by applicable laws, in no event will Accela's cumulative liability for any general, incidental, special, compensatory, or punitive damages whatsoever suffered by Customer or any other person or entity exceed the fees paid to Accela by Customer during the twelve (12) calendar months immediately preceding the circumstances which give rise to such claim(s) of liability, even if Accela or its agents have been advised of the possibility of such damages.
- 6.2 Force Majeure If either party is delayed in its performance of any obligation under this HA due to causes or effects beyond its control, that party will give timely notice to the other party and will act in good faith to resume performance as soon as practicable.
- 6.3 Dispute Resolution This HA is governed by the laws of the State of California. Any controversy or claim arising out of or relating to this HA, or the breach thereof, will be settled by arbitration administered by the American Arbitration Association under its Commercial Arbitration Rules, including the Emergency Interim Relief Procedures, and judgment on the award rendered by the arbitrator may be entered in any court having jurisdiction thereof. The place of arbitration will be Santa Clara County, California. Either party may apply to the arbitrator for injunctive relief until the arbitration award is rendered or the controversy is otherwise resolved. Either party also may, without waiving any remedy under this HA, seek from any court having jurisdiction any interim or provisional relief that is necessary to protect the rights or property of that party, pending the arbitrator's determination of the merits of the controversy. Each party will initially bear its own expenses and an equal share of the costs of the arbitration, but the prevailing party may be awarded its expenses, reasonable attorneys' fees, and costs. The failure of either party to object to a breach of this HA will not prevent that party from thereafter objecting to that breach or any other breach of this HA.
- 6.4 Assignment Accela may assign its rights and obligations hereunder for purposes of financing or pursuant to corporate transactions involving the sale of all or substantially all of its stock or assets. Accela may subcontract with qualified third parties to provide portions of the Maintenance Services described hereinabove.
- 6.5 Survival The following provisions will survive the termination or expiration of this HA: Section 3.4, as to limitation of remedy; Section 5 and all subsections thereof, as to Customer's obligation to pay any fees accrued or due at the time of termination or expiration; Section 6 and all subsections thereof with the

exception of Subsection 6.4; and Section 7 and all subsections thereof with the exception of Subsection 7.2.

- 6.6 Alternate Terms Disclaimed The parties expressly disclaim any alternate terms and conditions accompanying drafts and/or purchase orders issued by Customer.
- 6.7 Severability and Amendment If any particular provision of this HA is determined to be invalid or unenforceable, that determination will not affect the other provisions of this HA, which will be construed in all respects as if the invalid or unenforceable provision were omitted. No extension, modification, or amendment of this HA will be effective unless it is described in writing and signed by the Parties.

**ACCELA**

**CUSTOMER**

By: \_\_\_\_\_  
(Signature)

By: \_\_\_\_\_  
(Signature)

\_\_\_\_\_  
(Print Name)

\_\_\_\_\_  
(Print Name)

Its \_\_\_\_\_  
(Title)

Its \_\_\_\_\_  
(Title)

Dated: \_\_\_\_\_  
(Month, Day, Year)

Dated: \_\_\_\_\_  
(Month, Day, Year)

**Exhibit Follows.**

**END OF DOCUMENT**

SAMPLE

EXHIBIT A

Deliverables	Fees
	\$
Total of Fees	\$

First-Term Annual Hosting Fees are fixed-price deliverables for which full payment is due upon signing.

END OF DOCUMENT

SAMPLE

Hosting Agreement (HA), Version 05262015

# From Planning to Permits, Zoning to Compliance

*Research on the 50 largest U.S. cities' use of automated  
land management systems*



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## INTRODUCTION

Ask any contractor, and they'll probably agree. The planning and permitting portion of a project has historically been a complex and time-consuming venture, riddled with inefficiency, manual processes and long waits for approval. For the average citizen (aka not an experienced contractor) trying to DIY a building project, it can be an even greater frustration. For the employees of city planning and other departments responsible for things like permitting, zoning and compliance, the sentiment is the same. Manual work, inefficient workflows and tedious processes keep agencies from realizing cost efficiencies and best serving constituents.

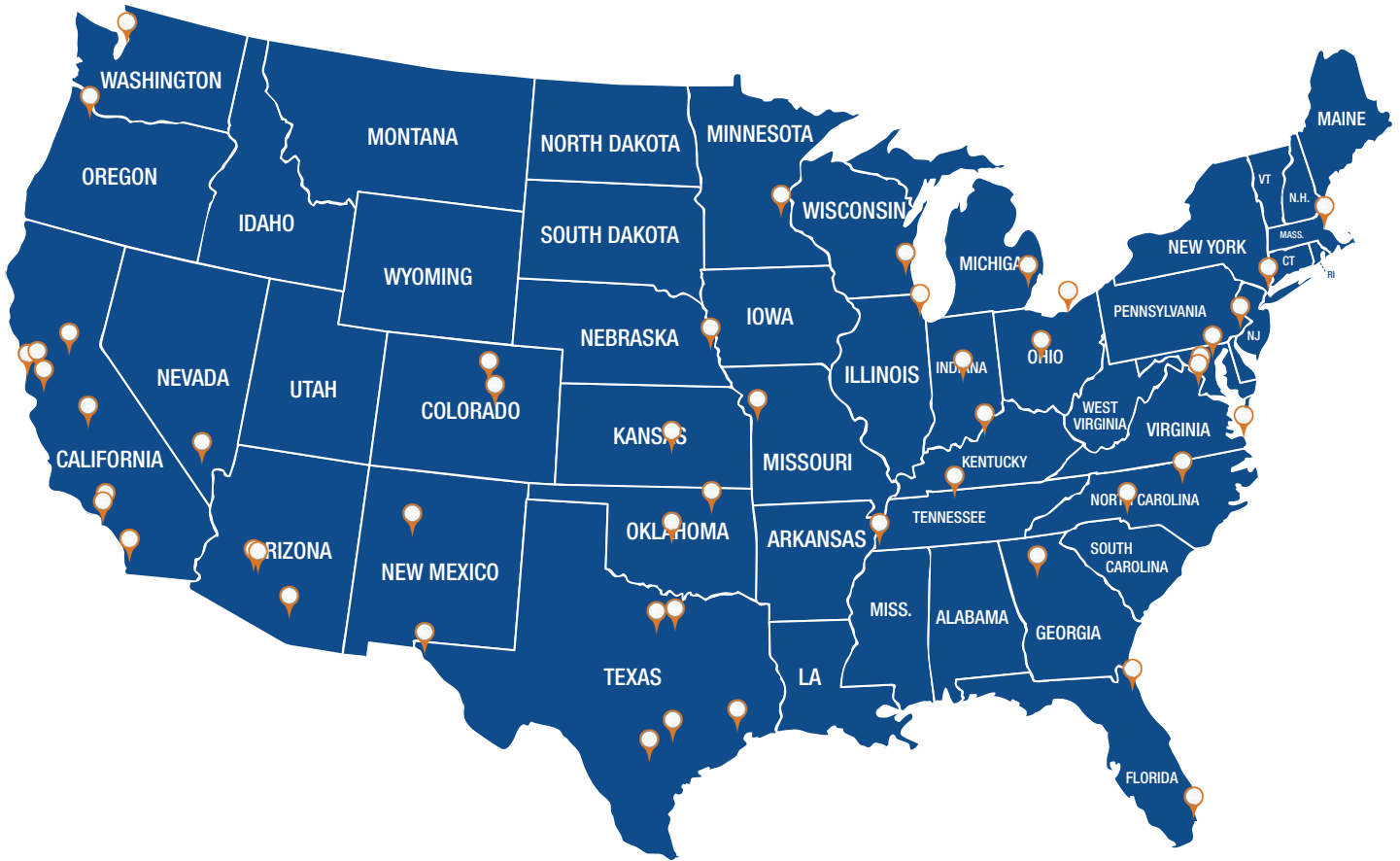
Fortunately, technology has helped eliminate inefficiency as agencies adopt automated systems to streamline planning and development, simplify the permit process, enable contractors and builders to access forms online, and more. Web-based one-stop business portals and mobile access have further helped transform planning departments from complex bureaucracies to citizen-focused centers of convenience.

This technology, often collectively referred to as land management systems, is important as the systems directly impact everyday citizens and also affect revenue generated via land management activities. Because of this, it is critical for cities and agencies to invest in proven platforms with trusted vendors that have the capacity to deliver on large, high-stakes projects.

This research report provides detailed information regarding the 50 largest (by population) U.S. cities' choices in land management systems.<sup>1</sup> Data was gathered by the Center for Digital Government (CDG) and Accela, which serves as a vendor for 25 of the 50 largest cities. The purpose of this document is to provide municipality leaders with information regarding the choices their peers are making in technology investments.

1. The largest cities were determined based on estimates of population from the United States Census Bureau as of July 1, 2012.

# TOP 50 CITIES BY POPULATION



1. New York, N.Y.	14. San Francisco, Calif.	27. Louisville, Ky.	40. Atlanta, Ga.
2. Los Angeles, Calif.	15. Columbus, Ohio	28. Portland, Ore.	41. Colorado Springs, Colo.
3. Chicago, Ill.	16. Fort Worth, Texas	29. Oklahoma City, Okla.	42. Raleigh, N.C.
4. Houston, Texas	17. Charlotte, N.C.	30. Milwaukee, Wis.	43. Omaha, Neb.
5. Philadelphia, Pa.	18. Detroit, Mich.	31. Las Vegas, Nev.	44. Miami, Fla.
6. Phoenix, Ariz.	19. El Paso, Texas	32. Albuquerque, N.M.	45. Oakland, Calif.
7. San Antonio, Texas	20. Memphis, Tenn.	33. Tucson, Ariz.	46. Tulsa, Okla.
8. San Diego, Calif.	21. Boston, Mass.	34. Fresno, Calif.	47. Minneapolis, Minn.
9. Dallas, Texas	22. Seattle, Wash.	35. Sacramento, Calif.	48. Cleveland, Ohio.
10. San Jose, Calif.	23. Denver, Colo.	36. Long Beach, Calif.	49. Wichita, Kan.
11. Austin, Texas	24. Washington, D.C.	37. Kansas City, Mo.	50. Arlington, Va.
12. Jacksonville, Fla.	25. Nashville, Tenn.	38. Mesa, Ariz.	
13. Indianapolis, Ind.	26. Baltimore, Md.	39. Virginia Beach, Va.	

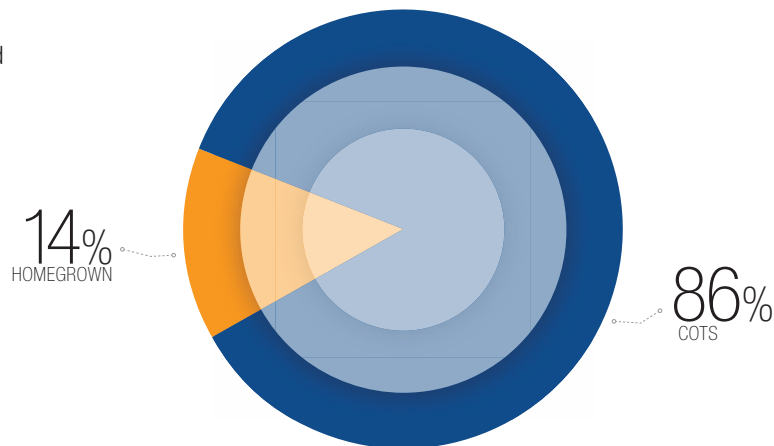
## TECHNOLOGY USED BY TOP 50 CITIES

The 50 most populous cities in the U.S. are choosing seven technology companies to implement their land management systems or software. These companies are:

- Accela
- Azteca Systems
- Computronix
- CSDC Systems
- Infor
- Tyler Technologies
- SunGard

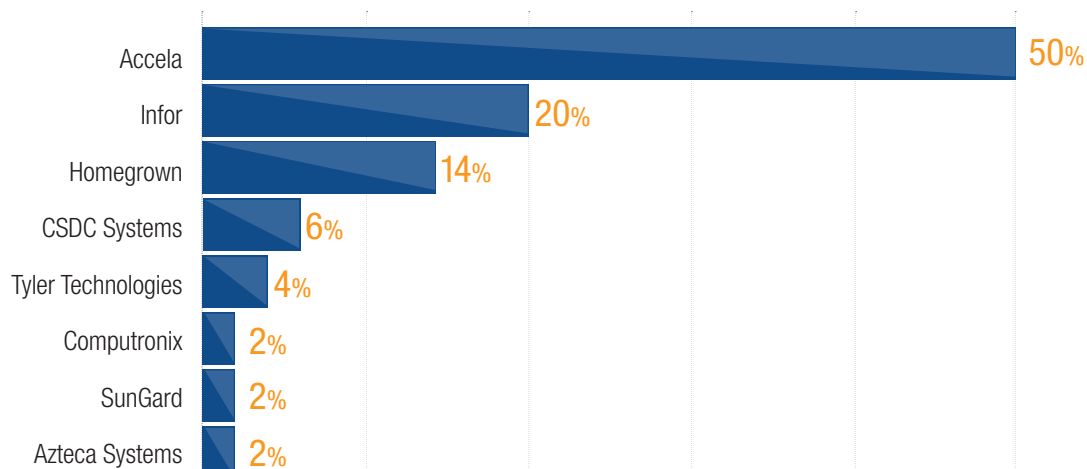
## CUSTOM-OFF-THE-SHELF (COTS) VS. CUSTOM HOMEGROWN

Of the 50 cities, 86 percent have selected a COTS land management system and 14 percent (7 cities) use a custom homegrown system.



## LAND MANAGEMENT SYSTEM VENDOR CHOICES

Accela is the dominant land management software vendor in the top 50 cities with half of the market share. While this is significant, it is important to identify the technology used by the other half of the top 50 cities. The graphic below displays the breakdown.

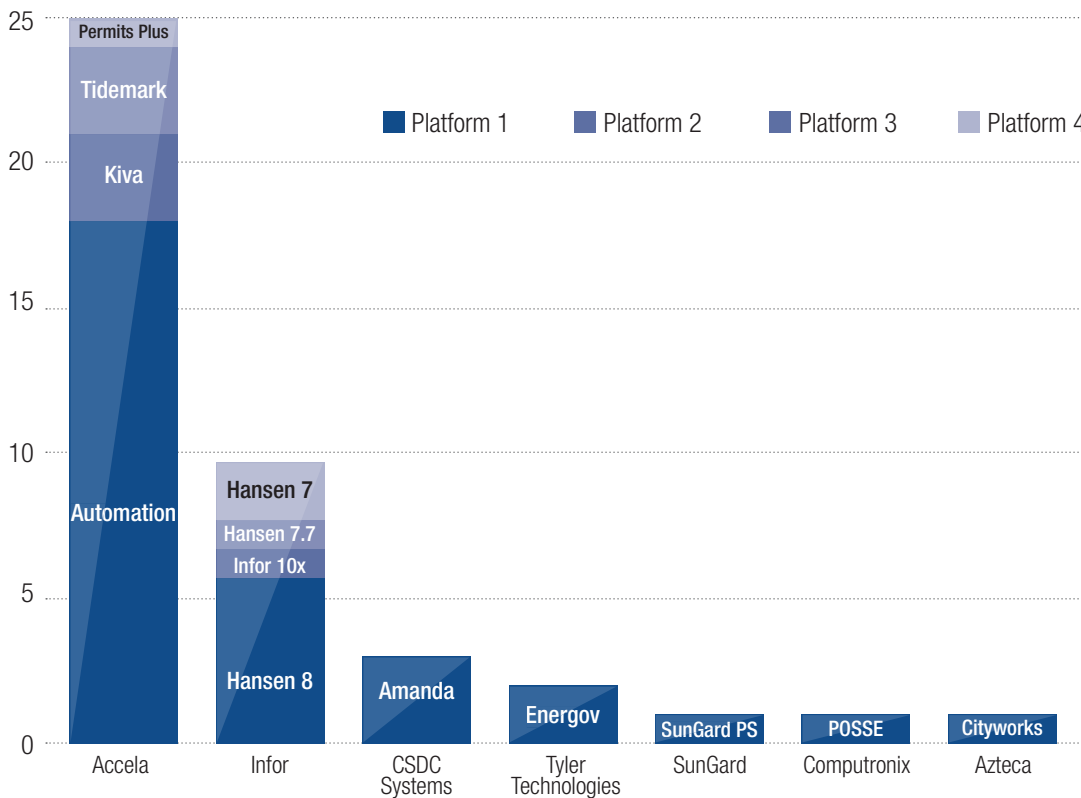


Some cities may be using multiple platforms of a vendor's land management technology. This is because a vendor will typically actively market only one current Web-based platform, but also have one or more legacy platforms that remain in use at one or more agencies. Some vendors may also have multiple product platforms as a result of competitor acquisitions, and others have multiple platforms as a result of replacing their own legacy client/server platform with a Web-based platform.

Vendors with more than one product platform installed at client sites include Accela, Infor and CSDC Systems. Accela has more than one product platform due to acquisitions of Kiva, Tidemark Advantage and Permits Plus. It has successfully migrated more than 90 agencies originally on legacy platforms to its flagship platform, Accela Automation. Infor and CSDC Systems have legacy client/server platforms that have been replaced by a Web-based platform.

## LAND MANAGEMENT PRODUCT PLATFORMS BY VENDOR

Given that multiple vendors maintain one or more land management platforms at client sites, it is important to analyze and compare these platforms in the top 50 cities. As previously mentioned, the vendors with multiple product platforms installed in their various respective top 50 cities include Accela, Infor and CSDC Systems. For the sake of comparison, the graph below also includes vendors that maintain a single product platform.



Accela's flagship system, Accela Automation, is used by 18 of 50 cities. Other legacy systems acquired by Accela — Kiva, Tidemark and Permits Plus — are used by seven cities combined. Infor is used by 10 of 50 cities. Of those 10, six cities use Hansen 8, two use Hansen 7, one uses Hansen 7.7 and one uses Infor 10x. Three of these are legacy systems. Other vendors, including CSDC Systems, Tyler Technologies, SunGard, Computronix and Azteca, are used by 8 cities combined. Each of these companies uses one platform each in the 50 cities surveyed.

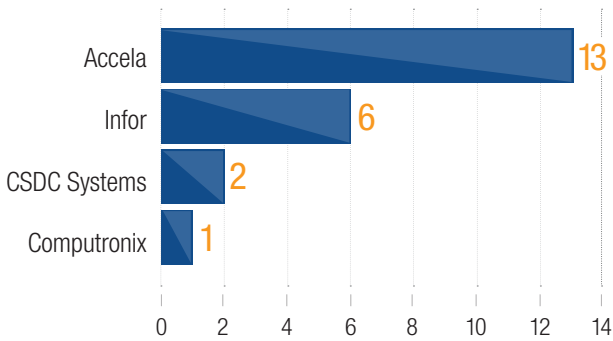


# LIVE LAND MANAGEMENT SYSTEMS

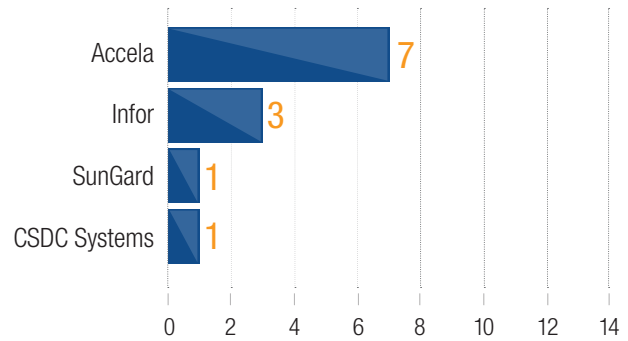
It is important to note whether a city is using a current or legacy version of a vendor's given product platform and also whether that system is "live." Of the 43 agencies that use a COTS land management platform, 34 have live systems. Of the 34 cities that are live on their land management platform, 22 are live on a given vendor's current (non-legacy) platform. The graph below displays these numbers and also provides data on the vendors that have live and current (non-legacy) systems in the 50 cities.

It is worth noting that two of the seven vendors included in this analysis, Tyler Technologies and Azteca, do not have a live client in the top cities' list on either a current or legacy platform.

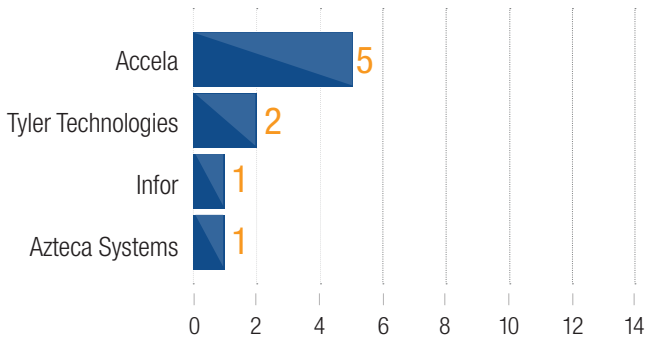
**Live Systems on Current (Non-Legacy) Vendor Platform**



**Live Systems on Legacy Vendor Platform**



**Systems Being Implemented (Not Yet Live)**



The above three graphs illustrate several findings:

- Accela platforms are used in 25 of the 50 top cities and 13 of those cities are live on the most current platform. Five of the remaining cities are not live yet, indicating that Accela is working to move them from a legacy platform to the current platform, Accela Automation.
- Infor platforms are used by 10 of the top 50 cities. Of those cities, six are on the most current platform and one of the cities has a system that is not yet live.
- CSDC Systems platforms are used by 3 of the 50 cities. Two of these cities are live and on the most current platform. The other is live but not on the most current platform.
- Tyler Technologies is used by 2 of the 50 cities, but neither of these implementations is currently live.
- SunGard, Computronix and Azteca Systems are each used by 1 of the 50 cities. SunGard is live but not on the most current version. Computronix is live and on the latest version and Azteca Systems is not live.

## CONCLUSION

The information included in this report should provide valuable data for cities or agencies considering investing in a land management system or upgrading a current system. By reviewing the systems used by the top 50 cities, leaders can get a sense of trusted players in the market, as well as their commitment to migrating customers to the most current versions of software.

## APPENDIX A: RAW DATA FOR 50 LARGEST CITIES

2012 Population Rank	City	Current Vendor	Current Land Management System	Live	On Latest Vendor Platform
1	New York	Accela	Accela Automation	No	Yes
2	Los Angeles	Homegrown	Homegrown	Yes	n/a
3	Chicago	Infor	Hansen 8	Yes	Yes
4	Houston	Homegrown	Homegrown	Yes	n/a
5	Philadelphia	Infor	Hansen 8	Yes	No
6	Phoenix	Homegrown	Homegrown	Yes	n/a
7	San Antonio	Infor	Hansen 7	Yes	No
8	San Diego	Homegrown	Homegrown	Yes	n/a
9	Dallas	Computronix	POSSE	Yes	Yes
10	San Jose	CSDC	Amanda	Yes	Yes
11	Austin	CSDC	Amanda	Yes	No
12	Jacksonville	Homegrown	Homegrown	Yes	n/a
13	Indianapolis	Accela	Accela Automation	Yes	Yes
14	San Francisco	Accela	Accela Automation	No	Yes
15	Columbus	Accela	Accela Automation	Yes	Yes
16	Fort Worth	Accela	Accela Automation	Yes	Yes
17	Charlotte	Accela	Accela Automation	Yes	Yes
18	Detroit	Accela	Accela Tidemark	Yes	No
19	El Paso	Accela	Accela Automation	Yes	Yes
20	Memphis	Homegrown	Homegrown	Yes	n/a
21	Boston	Infor	Hansen 8	Yes	Yes
22	Seattle	Accela	Accela Automation	No	Yes
23	Denver	Accela	Accela Automation	No	Yes
24	Washington D.C.	Accela	Accela Automation	Yes	Yes
25	Nashville	Azteca	Cityworks	No	Yes
26	Baltimore	Accela	Accela Tidemark	Yes	No
27	Louisville	Infor	Hansen 7	Yes	Yes
28	Portland	Infor	Hansen 8	No	Yes
29	Oklahoma City	Accela	Accela Automation	Yes	Yes
30	Milwaukee	Accela	Accela Automation	No	Yes
31	Las Vegas	Infor	Infor 10x	Yes	No
32	Albuquerque	Accela	Accela Kiva	Yes	No
33	Tucson	Accela	Accela Permits Plus	Yes	No
34	Fresno	SunGard	SunGard Public Sector	Yes	No
35	Sacramento	Accela	Accela Automation	Yes	Yes
36	Long Beach	Infor	Hansen 8	Yes	Yes
37	Kansas City	Accela	Accela Kiva	Yes	No
38	Mesa	Accela	Accela Tidemark	Yes	No
39	Virginia Beach	Accela	Accela Automation	Yes	Yes
40	Atlanta	Accela	Accela Automation	Yes	Yes
41	Colorado Springs	Tyler	Energov	No	Yes
42	Raleigh	Tyler	Energov	No	Yes
43	Omaha	Accela	Accela Automation	Yes	Yes
44	Miami	Homegrown	Homegrown	Yes	n/a
45	Oakland	Accela	Accela Automation	Yes	Yes
46	Tulsa	Infor	Hansen 7.7	Yes	Yes
47	Minneapolis	Accela	Accela Kiva	Yes	No
48	Cleveland	Accela	Accela Automation	Yes	Yes
49	Wichita	Infor	Hansen 8	Yes	Yes
50	Arlington	CSDC	Amanda	Yes	Yes

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Accela, Inc. provides the leading civic engagement platform, powering thousands of services and millions of transactions daily for large and small public agencies worldwide. We connect government to people and accelerate and streamline land management, licensing, asset management, and public health and safety processes. Accela's Civic Cloud includes a complete platform, both packaged and tailored solutions and cloud-based, office, mobile and social applications to support government agency, business and citizen needs. Accela is headquartered in San Ramon, Calif., with international offices in Australia and the United Arab Emirates. For more information, visit [www.accela.com](http://www.accela.com).



The Center for Digital Government is a national research and advisory institute focused on technology policy and best practices in state and local government. The Center provides public- and private-sector leaders with decision support and actionable insight to help drive 21st-century government.

The Center is a division of e.Republic, the nation's only media and research company focused exclusively on state and local government and education.

## Section 9.0 Appendix

### 9.1 Accela's Financial Information

Accela, Inc. is a privately held corporate entity, organized and maintained pursuant to the laws of the State of California.

As a non-public corporation and in accordance with its longstanding corporate policies, Accela does not make public disclosures of its financial records or general fiscal condition. Accela is subject to the corporate governance established by its shareholders and board of directors and, as such, Accela maintains its financial condition and related statements confidential. Due to the sensitivity of this information, and the fact that Accela is not publicly traded, releasing such information to the public would open the company to undue scrutiny by its competitors. We also do not issue annual reports.

Accela voluntarily submits to a complete annual audit of its financial statements. Each audit is performed by KPMG—one of the world's premier accounting companies, and they have issued an unqualified opinion on Accela's most recent annual audited financial statements.

If selected, Accela will provide financial statements as part of the contract and under strict non-disclosure agreement with the agency.

### 9.2 Financial Viability

In March 2015, Accela announced it had closed a \$143.5 million round of equity financing, led by ABRY Partners. This latest funding round brings the total capital raised by the company to more than \$200 million in the past 15 months. This includes a \$40 million growth equity investment led by Bregal Sagemount in October 2013 and \$20 million in debt financing raised from Wells Fargo. Accela will deploy the new capital to round out its cloud offering, expand the capabilities of the Civic Platform and scale sales efforts for its worldwide installed base of government agency customers.

Core to Accela's market leadership is our unwavering commitment to product development and its continued efforts to ensure that its products and staff remain current with new technologies. The business is not highly capital intensive and as such, can invest heavily in the development of intellectual property and retain the most technical software engineers, professional services team members and support personnel.

Today, Accela has more than 2,100 successful government implementations worldwide, representing a 50 percent market share in the 50 largest U.S. cities. With a customer renewal rate of over 90 percent, Accela is poised to maintain a

Watch Maury Blackman, Accela CEO, explain why this new funding benefits government at <http://bloom.bg/1EjnJRC>

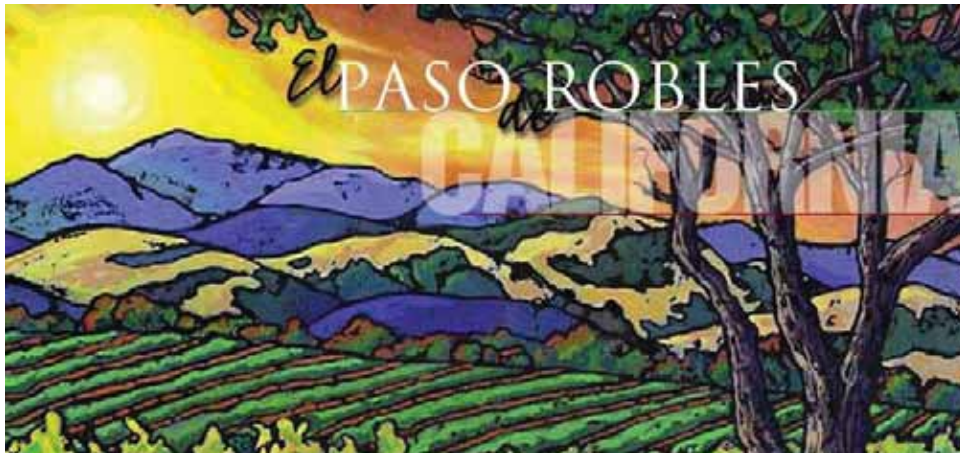
leadership position in the growing government technology market and is the leading platform for government.

### 9.3 Accela’s Exceptions to Proposed Terms and Conditions

Paragraph (As Noted and Wherever Referenced in the RFP)	Exception	Proposed Language / Solution
Entire RFP - General Requirements	Proposer objects to certain general requirements within City’s RFP, to being held in strict compliance with the RFP and including the RFP and Proposal within the final contract, as these are not applicable to software subscription licenses and maintenance services proposed by Proposer. The proposed COTS software is not designed explicitly to City’s requirements and specifications. The software will meet Proposer’s published specifications that the City will evaluate and determine if it is consistent with their assessed needs.	Proposer agrees to include the RFP and Proposal as an exhibit to the final contract, so long as the RFP does not impose any requirements that are inconsistent or additional to its commitments already within the Proposal. Proposer recommends that City utilize its software subscription license and maintenance agreements as these documents conform to Proposer’s published specifications. Proposer’s commercial-off-the-shelf (COTS) product will perform to its published specifications, not City’s RFP specifications, suggesting that the parties negotiate objective testing, acceptance & determination procedures, and cure of breaches criteria.
Assignment	Proposer objects to prior City approval for assignments made for the purposes of financing or pursuant to changes in corporate structure as these to not affect the provision of services by Proposer.	Add the following language: “Notwithstanding, Proposer may assign its rights and obligations hereunder for purposes of financing or pursuant to corporate transactions involving the sale of all or substantially all of its stock or assets.”
Personnel	As an independent Proposer, Proposer must retain exclusive right to assignment of personnel including qualified third parties to provide portions of the professional services.	Substitute language: Proposer retains exclusive right to assignment of personnel, including subcontractors, performing under this agreement. If, for whatever reason, City requests the replacement of a particular individual, Proposer will accommodate the request, if possible, subject to notification. In such event, Proposer shall replace the individual with a person of comparable, or superior, background and experience.

Paragraph (As Noted and Wherever Referenced in the RFP)	Exception	Proposed Language / Solution
Warranty	Proposer objects to the warranty coverage proposed by the City and that the warranty would minimally be valid for the duration of implementation and until final acceptance of all application modules and that the software product is limited to a particular purpose.	Proposer warrants that the software product offered by Proposer is free of material defects and shall operate as provided within Proposer’s published specifications and Proposal. Proposer warrants that it has full power and authority to grant licenses to the software proposed and that, as of the effective date of this submission, the software does not infringe on any existing intellectual property rights of any third party. Proposer will commence and complete its professional services and maintenance obligations in a good and workmanlike manner, consistent with the practices and standards of care generally-accepted within and expected of Proposer’s industry, to ensure that the operation of the maintained software products does not materially differ from documented specifications. Proposer may make repeated efforts within a reasonable time period to resolve maintenance requests. Proposer provides a ninety (90) day warranty for professional services deliverables, starting from date of acceptance. All professional services are provided “as is” without express or implied warranty of any kind regarding the character, function, capabilities, or appropriateness of such services or deliverables. Proposer provides no warranty whatsoever for any third-party hardware or software products. Third-party applications that utilize or rely upon the professional services may be adversely affected by remedial or other actions performed pursuant to this agreement; Proposer bears no liability for and has no obligation to remedy such effects.

**END OF PROPOSAL**



## City of Paso Robles

Building Permit/Land Management System (LMS)

Accela's Best and Final Offer (BAFO)

August 8, 2016



# BAFO - Cost Proposal Cover Letter

August 8, 2016

Ms. Devon Vandergon, Building Administrator  
City of Paso Robles  
1000 Spring Street  
Paso Robles, CA 93446

RE: Request for Proposal for Building Permit/Land Management System (LMS)

Dear Ms. Vandergon:

As requested, we are really pleased to present to you our Best and Final Offer. Accela appreciates the opportunity to submit the enclosed Cost Proposal in response to the City's RFP for a new state-of-the-art Land Management System (LMS) to support the City of Paso Robles.

We are confident that we have provided a solution that meets and/or exceeds every software and operational requirement listed. It is clear that a great deal of effort and thought went into this project. With over 30 years of working with government agencies, Accela takes great pride in responding to the written documents and requirements contained in RFPs exactly as requested.

We look forward to the opportunity to work with the City of Paso Robles as you meet your goals in finding a new LMS Software System. We stand behind the recommendations we have made in this proposal, and look forward to the opportunity to discuss our ideas with your team to deliver the most cost effective solutions.

I will act as Accela's primary contact for all matters regarding this response, and can be reached at 603-616-7221 or via email at [hhuntington@accela.com](mailto:hhuntington@accela.com).

Thank you for your consideration.

---

Hilary Huntington  
Business Development Executive  
Accela, Inc.  
2633 Camino Ramon, Suite 500  
San Ramon, CA 94583

---

Date

## Outlined Below is Accela's Best and Final Offer for Paso Robles:

As part of Accela's Best and Final Offer we are pleased to propose the following updated Pricing Proposal for the City of Paso Robles. *This pricing option is contingent on all contracts being signed before September 30, 2016.* Per discussions with NexLevel, we are providing the City with an updated proposal including Accela Legislative Management.

### Accela Civic Platform and Legislative Management:

Product Description	Accela Standard Price	Amount on Original Proposal Jan -2016	Total Discount Applied	Final BAFO Price
Accela Civic Platform Subscription Users (20 Users)	\$47,760	\$40,596	(\$9,552)	\$38,208
Accela Leg Man (Agenda & Minutes/Boards &Commissions)	\$15,240	N/A	(\$3,048)	\$12,192
<b>TOTALS Per Year</b>	<b>\$63,000</b>	<b>\$40,596</b>	<b>(\$12,600)</b>	<b>\$50,400</b>

*\*Price is valid through September 30<sup>th</sup> 2016*

### Accela Five Year Cost Breakdown:

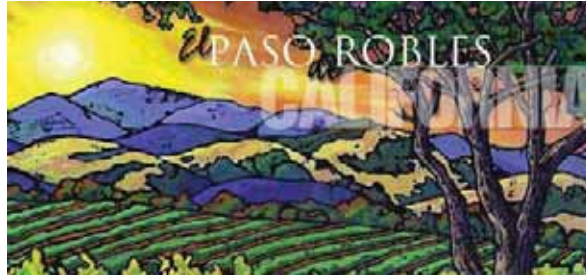
	Year 1	Year 2	Year 3	Year 4	Year 5
Accela Civic Platform Subscription Users (20 Users)	\$ 38,208.00	\$ 40,118.40	\$ 42,124.32	\$ 44,230.54	\$ 46,442.06
Accela Legislative Management	\$ 12,192.00	\$ 12,801.60	\$ 13,441.68	\$ 14,113.76	\$ 14,819.45
<b>TOTALS Per Year</b>	<b>\$ 50,400.00</b>	<b>\$ 52,920.00</b>	<b>\$ 55,566.00</b>	<b>\$ 58,344.30</b>	<b>\$ 61,261.52</b>

*\*Price includes a 5% increase year over year.*



# Attachment 7

## Scope of Work for Migrating of Permits Plus to Accela Civic Platform



City of Paso Robles, CA

June 20, 2016  
Version 1.0

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## DOCUMENT CONTROL

Date	Author	Version	Change Reference
6/19/16	Keith	v1.0	

## Introduction

### OVERVIEW

The following Statement of Work will detail how TruePoint 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 Accela (“TruePoint”) to Agency (“Agency”).

Capitalized terms not defined in this SOW are as defined in the Services Agreement. In the event of any conflict between the Agreement and this SOW, the terms of the Services Agreement shall govern.

### 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. These factors are critical in setting expectations between the Agency and TruePoint identifying and monitoring project risks, and promoting strong project communication.

**Cooperative Effort** – TruePoint and the Agency will work together during Initiation to set the expectations of the services and deliverables each will provide to the other. In some cases (such as schedule management) responsibilities will be shared. The Agency will provide a Project Manager who will be available to the TruePoint Project Manager for reporting and planning meetings, and as needed for issue and risk management, deliverable reviews, etc. The TruePoint Project Manager will be similarly available to the Agency Project Manager.

**Knowledge Transfer** - While the TruePoint team cannot guarantee specific expertise for Agency staff as a result of participating in the project, the TruePoint team will make all reasonable efforts to transfer knowledge to the Agency. This knowledge transfer includes work products and deliverables as defined at the end of this SOW. It is critical that Agency personnel participate in the analysis, configuration and deployment of Accela Civic Platform in order to transfer knowledge to the Agency. After the post production assistance tasks are completed by the TruePoint services team, the Agency will be responsible for supporting the Accela Civic Platform. The Agency will receive basic support thru the Accela Customer Research Center (CRC) as defined in the Accela Maintenance Agreement. The Agency will also have the option to purchase additional services thru TruePoint.

Key knowledge transfer areas include:

- Configuration
- Scripting
  - Batch scripts
  - Interfaces
  - Event Management Scripts
- Reports and Forms

**Dedicated Agency Functional Staff Participation** – The TruePoint team fully understands that Agency staff members have daily responsibilities that will compete with the amount of time that can be dedicated to the Accela Civic Platform 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, which will be detailed during the initiation phase. The TruePoint team and Project Manager will work with the



Project Sponsors, Owner, and department leaders to allocate appropriate staff for involvement. This could range from full-time during early analysis meetings to part-time during the technical implementation phase.

**Formal but Flexible Project Management** – Both the TruePoint team and Agency acknowledge the complexity of this project with its legacy database, multitude of associated business processes, many interfaces, and diverse stakeholders. It should be expected that presently unknown difficult factors and events will arise. Formal cost, schedule, resource, requirements, and risk management will be used to minimize the effects of changes that result in delays, extra cost, or unmet customer needs.

## HIGH LEVEL MILESTONES AND SAMPLE DELIVERABLES

The scope of services is delivered in six stages and will result in an initial deployment of the Accela platform. A high level description of the phases is listed below.

<b>STAGE DESCRIPTION</b>	<b>MILESTONE OVERVIEW</b>	<b>SAMPLE DELIVERABLES</b>
Stage 1: Initiation	Set up the project framework for a successful delivery	Project Charter Project Plan Project Kickoff
Stage 2: Analysis	Provide best practice consulting to define to-be configuration for Agency	To-Be Analysis documentation (Record Types, Fees, Inspections, Workflows, Custom Fields)
Stage 3: Solution Foundation	Create the appropriate solution architecture blueprint for a successful deployment	Configuration blueprint
Stage 4: Build/Conversion	Build out Accela platform. Create and deliver conversion schemas, interface schemas and other technology solutions needed for implementation	Historical Data Analysis & Mapping Development of Scripts & Interface specifications Reporting specifications
Stage 5: Readiness	Validate Accela solution for Agency deployment via testing	User Acceptance Testing Training
Stage 6: Deploy	Move to Production (“Go Live”) and Support	Move to Production Post Deployment Support

### PROJECT TIMELINE

The estimated length of this project is 12 months for the initial deployment with the estimated start date being thirty (30) calendar days after contract signing.

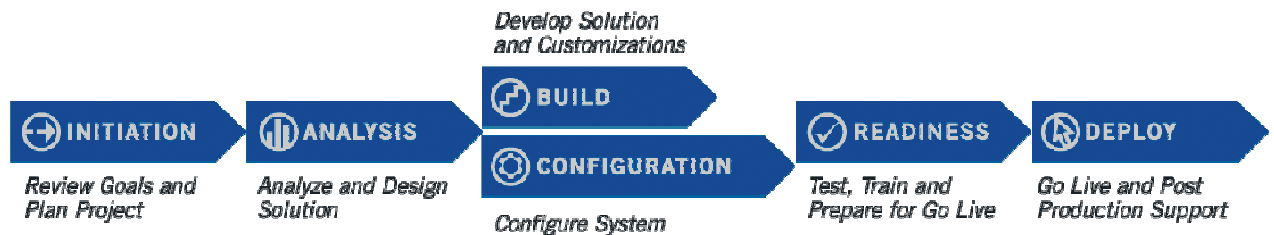
Upon initiation of these Services, the TruePoint Project Manager will work with the Agency to collaboratively define a baseline project schedule. Given the fact that project schedules are working documents that change over the course of the project, the TruePoint Project Manager will work closely with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

### ACCELA CIVIC PLATFORM IMPLEMENTATION PROCESS

TruePoint and Accela are committed not only to providing a superior software solution for the current and future needs, but also to assist the Agency in the successful implementation and deployment of the solution. Accela/TruePoint has over 25 years of providing permitting systems for the public sector and is the only vendor in this market to have successfully installed and deployed a true 3-tier web-based solution.

TruePoint will work with Agency staff to optimize Accela’s portfolio of software, and customer experience to enable the Agency to successfully deploy its Accela Civic Platform solution and meet its functionality, timing and cost requirements.

The following diagram depicts our implementation methodology, broken down into six project stages:



## SCOPE OF SERVICES

TruePoint proposes a joint team approach to collaboratively configure and implement the Accela Civic Platform software. The system will be implemented using a combination of resources from the Agency and TruePoint. This will ensure that the Agency is prepared to maintain the system going forward by having hands on experience during the configuration. The following sections describe the proposed implementation services for the Agency in detail. The project will include the following modules and add-on products:

### PURPOSE

Implementation of Accela Civic Platform Modules for:

- Building
- Planning
- Code Enforcement
- Inspections
- Engineering

Implementation of the following Accela Add-On products:

- Accela GIS
- Accela Citizen Access
- Accela Mobile

## INITIATION

### PROJECT INITIATION

There are a total of 24 hours budgeted for the Project Initiation task.

During the Project Initiation stage, TruePoint will create a project plan with a critical path summary, as well as review, in conjunction with Agency project staff, all project milestones and deliverables that detail the effort described for this engagement. The draft of the project plan will be incorporated into a Master Project Plan that will be maintained by TruePoint and the Agency.

A Project Kickoff meeting will also take place during this project stage.

- Establish Project Plan
- Establish communication norms, status reporting, issue/risk management, work locations etc.
- Approval of hardware and software specs for workstations .
- Review contract, scope of project and goals
- Complete project communication plan

## PROJECT MANAGEMENT

There are a total of 196 hours budgeted for the Project Management task.

TruePoint will perform project management services needed to plan and monitor execution of the project in accordance with deliverables outlined in the Scope of Services. To support the implementation of the Accela Civic Platform solution for the Agency, TruePoint will provide Project Management services throughout the project. Generally these services include the following:

- Project Initiation
- Change order management
- Issue log management and escalation
- Resources management
- Meetings management

Project Management tasks will be shared between the TruePoint Project Manager and the Agency Project Manager. A project plan will be maintained and monitored using Microsoft Project.

## SYSTEM ACTIVATION

There are a total of 16 hours budgeted for the Installation task.

Accela will setup an Agency for the Agency on the Accela Hosted site in the PRODUCTION, SUPPORT and TEST environments.

TruePoint will perform the following tasks:

- Perform a remote software check of the installation.
- Activate the SUPP environment for implementation. PROD and TEST will become available at go-live.
- Demonstrate that the Accela Civic Platform Land Management applications are operational.

## ANALYSIS

### CONFIGURATION ANALYSIS

There are a total of 240 hours budgeted for the Configuration Analysis task.

During the Configuration Analysis stage, TruePoint will conduct interviews with key representatives from the Agency involved in the permitting processes for each department. The business analysis will be focused on the current permitting/case tracking processes in Permits Plus. TruePoint will make recommendations where appropriate on ways to make the current business processes work efficiently with the Accela Civic Platform.

During these configuration analysis workshops TruePoint will:

- Review and chart each business process as a basis for configuration in the workflow tool
- Review and document intake requirements, forms, and data fields for each permit/business process type
- Collect and document output requirements (documents/letters/reports).
- Collect and document fees, fee schedules, and collection procedures for each permit/business process type
- Collect and document all required inspections, corrections and inspection result options for each permit type

The final outcome of the Configuration Analysis will be a System Configuration Document that will be used as a roadmap for system configuration and testing.

The Configuration Document will fully define:

- Record Types
- Record Type Masks
- Record Specific Data elements
- Intake Form
- Record Statuses
- Workflows
- Fees
  - Fee Schedules
  - Fee Calculations
  - Account Codes
- Inspections
- Inspection Results
- Standard Conditions

Agency Responsibilities:

- Provide workflow documentation or work with TruePoint team to develop workflows for record types.
- Make available the appropriate key users and content experts to participate in the Configuration Analysis and verify the accuracy of the documented workflows, input/output formats and data elements.
- Provide information pertaining to current system users
- Document naming conventions
- Collect examples of referral agency lists, contractor lists, forms, data fields, output requirements, documents, letters, reports and procedures needed to configure the application
- Work with TruePoint to document notification points in processes and opportunities for automation (system generated emails, auto-schedule inspections etc.)
- Collect and document fee schedules and fee assessment procedures, including penalties and payment collection steps
- Outline process for inspection scheduling, work assignments and monitoring inspection status
- Collect formats and data elements needed to design data conversions and handle interfacing needs.

Deliverable: The deliverable from the Configuration Analysis will be the Accela Civic Platform system configuration document.

Acceptance Criteria: The Configuration Document will be accepted when TruePoint, and Agency agree that each business process has been appropriately documented. Acceptance must be completed prior to System Configuration.

## CONFIGURATION

### SYSTEM CONFIGURATION

There are a total of 320 hours budgeted for the System Configuration tasks.

The system configuration will include all items defined in the system configuration document:

- Record Types
- Record Type Masks
- Record Specific Data elements
- Intake Form
- Record Statuses
- Workflows
- Fees
  - Fee Schedules
  - Fee Calculations
  - Account Codes
- Inspections
- Inspection Results
- Standard Conditions

The configuration will also include core features for:

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

#### Agency Responsibilities:

- Identify and make available staff members who will work with TruePoint through thru the configuration process.
- Arrange the time of qualified decision makers and business experts to confirm the workflow configuration and answer additional questions that are critical to project success.
- Work with TruePoint on naming conventions for process steps, tasks, milestones, statuses, holds and dispositions
- Provide information in a timely manner
- Provide information and data to the format specified by TruePoint
- Final system testing (UAT) of the configuration.

Acceptance Criteria: The Agency will test the configured system for purposes of validating the Record types configured. The Records will be accepted when TruePoint and the Agency agree that all requirements, objectives, and scope have been appropriately defined in each Record type.

## CUSTOM BUSINESS RULES INTEGRATION

There are a total of 80 hours budgeted for the custom business rules integration (Event Scripts).

TruePoint will develop Event Scripts using the Accela Civic Platform's integral Business Rules Integration engine functionality to automate specific business rules and processes. Examples of processes to be automated with scripts include: business inspection assignment, email notifications or automatic fee creation.

The need for custom business rules will be identified during the configuration or as late as end user testing.

### Agency Responsibilities:

- Arrange the time for qualified decision makers and business experts for the design review/configuration analysis sessions that are critical to project success
- Provide information in a timely manner
- Ensure that the data populates successfully according to the script requirements document
- Identify and make available staff members who will work with TruePoint through this process and take responsibility for providing information for and validating the Event Manager Scripts to be developed
- Allocate the time for qualified personnel to test the interface for acceptance

Acceptance Criteria: The successful demonstration of the developed scripts within the Accela Civic Platform to meet the intended business requirement will be accepted after the completion of testing by Agency in agreement with TruePoint

## ACCELA GIS

The TruePoint Team will install and configure Accela GIS to link and leverage existing Agency GIS coverage information, including assistance with establishing the map service to be used in conjunction with Accela GIS. The TruePoint Team will provide up to 52 hours from the Accela GIS cost category. The Agency will work with Accela IT staff to establish a VPN tunnel between the Agency and the Accela Hosted site for Accela GIS.

### Agency Responsibilities:

- Arrange for the availability of appropriate people for the system installation, setup, testing, and quality assurance throughout the setup process
- Provide people and physical resources based on the dates outlined in the project schedule.
- Provide information and data in the formats specified by Accela that will be needed for the GIS implementation.

Acceptance Criteria: Acceptance will require the successful demonstration of the AGIS module within the Accela-system to Agency.

## ACCELA CITIZEN ACCESS

There are a total of 112 hours budgeted for the Accela Citizen Access configuration and setup.

TruePoint will deliver and configure the Accela Citizen Access module. TruePoint will work closely with Agency staff to configure the Citizen Access site. Citizen Access will extend certain aspects of the internal configuration for use by the general public. Features available for configuration include:

- Permit Application and Issuance
- Online Payment
- Inspection Request
- Inspection Results
- Status Tracking

Agency Responsibilities:

- Arrange for the availability of appropriate people for the system installation, setup, testing and quality assurance throughout the setup process
- Procure appropriate online merchant account for processing of online credit card payments
- Provide people and physical resources based on the dates outlined in the project schedule
- Prepare the hardware, software and network in accordance with the specifications provided by TruePoint
- Provide information on the services and selected CAPs that the Agency desires to offer via Accela Citizen Access
- Provide Accela supported merchant account for online payment

Acceptance Criteria:

Acceptance will require the successful demonstration of the ACA module within the Accela system to Agency.

## **ACCELA MOBILE**

There are a total of 40 hours budgeted for the Accela Mobile Device setup.

TruePoint will install and configure the Accela Mobile products with the Agency. As part of this deliverable the TruePoint team will perform the configuration tasks required to ensure Accela Mobile interfaces with the back office in both the SUPP and PROD environment.

To support these activities TruePoint will provide the following services:

- Support the Install of the Accela Mobile APPS
- Assist in the configuration of the system for use in conjunction with the Agency's selected mobile device.

Agency Responsibilities:

- Arrange for the availability of appropriate people for the system installation, setup, testing, and quality assurance throughout the setup process
- Order and procure necessary hardware, non-Accela systems software, and networking infrastructure as specified.
- Provide people and physical resources based on the dates outlined in the project schedule.

Acceptance will require the successful demonstration of the implemented module within the Accela system to the Agency.



## BUILD

### DATA CONVERSION

Due to the inherent complexity of conversion activities, it is critical to address and understand common questions and misconceptions. Any conversion activity or requirement not included in this section is considered out of scope, and may be addressed through a change order for Accela services.

#### General Information and Requirements for Historical Conversions

- The standard data conversion includes the conversion of transactional data to the Accela Civic Platform database when a configured destination exists. In the event there is no destination for legacy transactional data then it will be required to be converted as best fits into another area of the configuration or excluded from the conversion effort.
- TruePoint will perform unit testing of the conversion program including spot checks of the data within Accela Automation in order to identify if data corruption issues exist. Extensive quality assurance of legacy/historical data by the agency is required in order to ensure accurate transfer of data.
- A completed, signed off, Solution Foundation must be available before TruePoint will begin the data conversion mapping effort.

#### Data Conversion Assumptions

- **“As-Is” Approach:** Conversion of transactional tables, Address/Parcel/Owner (APO) data, Professional License data is executed “As-is” into Accela Automation. “As-is” means that the data will be transformed as mapped to existing configuration elements in the Accela Civic Platform. The conversion process will not create configuration data or alter the mapped data when processed into Accela Automation. Additionally this means if invalid, inaccurate, or incomplete data is provided, it will be loaded into Accela Automation “As-Is”. All data cleanup must occur prior to the conversion.
- **Accela Data Conversion Tools:** Data will be mapped and converted utilizing Accela’s Extract, Translate and Load (“ETL”) toolset. This will assist to ensure the accuracy of the mapping. The data mapping tool ensures that the legacy source to the Accela Civic Platform is accurate and prevents data from failing to convert, while the execution tool can be used to consistently run conversion process and track statistics.
- **Acceptable Data Formats For Historical Conversion:** It is expected that the Conversion Source Data be provided in an Oracle 10g/11g or Microsoft SQL Server database format. In the event that the source is not in an acceptable format, TruePoint will provide recommendations for transposing the data in the proper format.
- **Acceptable Data Formats For Reference Conversion:** It is expected that the Conversion Source Data be provided in Oracle 10g/11g, Microsoft SQL Server, or pipe delimited flat file format. In the event that the source is not in an acceptable format, TruePoint will provide recommendations for transposing the data in the proper format.

There are a total of 340 hours budgeted for the Permits Plus to the Accela Civic Platform data conversion.

TruePoint will work with the Agency representatives to assess both the client data to be converted and its use within the system. The team will work together to map the source data to the destination database. TruePoint will deliver a data-mapping document for the conversion for Agency acceptance.

Once the data mapping has been defined, TruePoint will ask that a representative of the agency sign off on the data maps. TruePoint will be responsible for the data conversion programs to load data to the Accela Civic Platform database in the Support and Production Environment.

TruePoint will convert all existing permit/case records, related information from Permits Plus described above to the Accela Civic Platform database. This conversion effort includes data mapping, script development for the conversion, data testing and validation, and assistance with final data migration/conversion.

#### Agency Responsibilities:

- Allocate time for qualified users and business experts for the data-mapping sessions that are critical to the project success.
- Provide complete and accurate information in a timely manner
- Assist in the data-mapping process, informational only.
- Ensure that the data is converted successfully according to the data-mapping document
- Allocate time for qualified personnel to test and verify the conversion for acceptance

Acceptance Criteria: The successful conversion of Agency data into the system will be accepted after both parties have tested and validated the conversion.

## REPORTS

There are a total of 120 hours budgeted for the Report creation/mentoring tasks.

The Agency will work with TruePoint to identify reports that already exist in the system. If a report does not currently exist in Accela Civic Platform, the respective entity will request the report be created by TruePoint. The assumption is that the Agency will take on a large part of the report creation effort. TruePoint will provide sample reports from our report library and focus on training and mentoring for Agency staff.

The report development will be done using Crystal Reports or Adhoc Reporting. These custom reports will be deployed in the Report Manager for use within the Accela Civic Platform. The hours budgeted for report creation is very limited and assumes the Agency will play a large role in this tasks completion.

#### **Possible reports include:**

Building Permit  
Grading Permit  
Encroachment Permit  
Gas Meter Release  
School Fee Form  
Building Permit Estimate  
Certificate of Occupancy  
Expired permit notification  
Daily Fee Intake Report

Weekly approved permits  
 Monthly approved permits  
 Monthly Finaled permits  
 Monthly count and valuation  
 State Report – C-404  
 Fee Payment Report – Done monthly, shows special assessment fees only (for finance)  
 Permits in applied status and by type  
 Permits in ready status and by type  
 Permits in the approved status and sort by type  
 Permits with outstanding fees  
 “green” permits  
 Inspection Statistics  
 New SFR permits for current FY  
 Approved previous month with sewer and water fees  
 Finaled Previous month with sewer and water fees

#### Agency Responsibilities:

- Make available the appropriate key users and content experts to participate in the report specification development and validation activities.
- Provide information and data in the formats specified by TruePoint that will be needed for the report configurations
- Provide Crystal Report and AdHoc reporting resources to work with TruePoint on the reports.

Acceptance Criteria: Prior to the development of a report the Agency will approve a report design specification document that will be created jointly by the Agency and TruePoint. The approved document will be used as a basis for determining completion and approval of the report.

## INTERFACES AND OTHER CONVERSIONS

### STANDARD ADDRESS, PARCEL AND OWNER INTERFACE

There are a total of 48 hours budgeted for the APO interface tasks.

TruePoint will deliver an interface to populate Address, Parcel and Owner (APO) information.

- The Agency will create staging tables in the standard Accela format for APO data, which TruePoint will use to update the Accela reference data. This process can be set up to run at whatever frequency the agency determines is appropriate.
- In addition to the standard data fields the agency may choose to add additional parcel attributes to the parcel data in the Land management system. These will be defined as part of the business analysis process.

### BUSINESS LICENSE HDL

There are a total of 56 hours budgeted for the APO interface tasks.

TruePoint will work with the Agency create a procedure to update the Accela Licensed Professional with Business License Number and Expiration date form HdI.

## PAYMENT EXPORT TO MUNIS

There are a total of 32 hours budgeted for the APO interface tasks.

TruePoint will work with the Agency create an export report that exports daily payment information by Account code into a specific data format to be used to import into Munis.

### Agency Responsibilities for Each Integration:

- 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 (third 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 the Accela Automation system.
- Validate interface through testing.
- Work with third party to ensure data from Accela Automation is in correct format.
- Update interface, post go-live, due to changes in third party system or Agency business processes.

## READINESS

### TRAINING

There are a total of 52 hours budgeted for the Training tasks.

Training will include:

- 1 days Core Team Introduction to Accela Civic Platform
- 2 days of System Admin training
- 1 days of Report Writer training
- .5 days of Event Script training
- 1 day Train the Trainer training
- 1 day End User training support

The agency Project Manager will identify those individuals to be trained in each of the above categories. These training classes will be scheduled throughout the implementation process as appropriate.

### TruePoint and Agency Responsibilities:

- Properly 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.

## USER ACCEPTANCE TESTING AND GO LIVE PREP

There are a total of 80 hours budgeted for User Acceptance Testing tasks.

This Task is time to test that the configured solution meets the agreed to solution as defined in all other tasks above. TruePoint will work closely with the agency implementation team to make sure the proper user acceptance testing and preparation for go live occurs. TruePoint will be both on site and work remotely through this process

### Agency Responsibilities:

- Make available the appropriate agency key users and content experts to participate in user acceptance testing.

### Acceptance Criteria:

This Deliverable will be accepted when agency agrees that the configured solution meets the agreed to solution as defined in all the sections above.

## DEPLOYMENT

### GO LIVE SUPPORT

There are a total of 40 hours budgeted for Go Live support tasks.

Production Go Live is defined as the first production use of the system. TruePoint will be on site during the cutover process and provide support for the agency end users and project team.

## KEY ASSUMPTIONS AND EXCEPTIONS

The following assumptions and exceptions apply to this project:

- The agency and TruePoint will be able to commit the time and resources necessary to participate in, and contribute to project activities
- The agency and TruePoint will use a collaborative approach to ensure implementation success
- The agency will provide TruePoint with reasonable access to its equipment, systems, personnel, and facilities to the extent needed to complete the Services.
- The agency is responsible for purchasing third party hardware and software required for Accela Citizen Access, including but not limited to an online merchant account and all related hardware required by the merchant account provider for the handling of credit cards and/or checks.
- TruePoint assumes that all APO data to be migrated will be scrubbed as necessary by agency resources prior to import
- Change Order process: Should the agency identify additional work as a part of this engagement during the System Configuration Analysis effort or at other points during the project duration, TruePoint will issue a Change Order to reflect the additional costs (if any) associated with the change for review and approval by the agency. No additional work will be undertaken without prior consent of the agency. See Appendix SOW-A for the Change Order template. If hours are available from tasks that are complete those hours can be used on other tasks with the prior consent of both parties.
- The implementation costs and travel expenses based on this scope of work will not exceed the amount of **\$343,400** without written consent provided by both Agency and TruePoint. Any consent to expand the implementation costs will be supported by the appropriate change orders

## PROJECT RESOURCES AND LOCATION OF WORK

### WORK LOCATION

Services contracted for under this Scope of Work may be performed remotely and/or at on-site facilities as deemed appropriate and reasonable for the successful completion of the services detailed herein. When on-site activities are required, the TruePoint Project Manager will coordinate with agency Project Manager to secure suitable accommodations to meet the specific engagement requirements. It is anticipated that TruePoint will require, at minimum, facilities to accommodate on-site System Configuration Analysis and Training. TruePoint will also require Internet access during on-site configuration efforts that will occur during the course of the project.

### TRUEPOINT RESOURCES

TruePoint will assign key professional services resources for this engagement. These individuals are well versed in the Accela Civic Platform application, and are well qualified to lead this effort. It should be understood that TruePoint, with appropriate notice to the agency, may choose to augment or replace individuals on this team with other qualified team members during the course of this effort. The TruePoint Project Manager shall assume full responsibility for the coordination of this team and its interaction with key agency resources assigned to the effort

### AGENCY RESOURCES

The Agency will provide the following personnel to work together with the TruePoint to deliver the Services as presented in this document, and make additional personnel available as necessary to ensure the success of this engagement. Additionally, the Agency should identify one or two users of the new system to be trained as administrators or “power users.”

The following list identifies functional roles required by this project, along with a brief description of their anticipated contribution to the project’s success. We suggest that you make the following appointments and share the outlined duties with the appropriate appointee. It is critical to the success of your implementation that the team members chosen be available during the implementation cycle, and schedule the time needed to participate fully in the planning and configuration processes.

#### **Project Sponsor**

Responsibilities include the following:

- Ultimate responsibility for the success of the project
- Creating an environment that promotes project buy-in
- Driving the project through all levels of the agency
- High-level oversight throughout the duration of the project

#### **Project Manager**

Responsibilities include the overall administration, coordination, communication, and decision-making associated with the implementation.

- Planning, scheduling, coordinating and tracking the implementation with TruePoint and across the departments within the agency
- Identifying and recruiting the in-house project implementation team

- Attending the initial workshop training
- Ensuring that the project team stays focused, tasks are completed on schedule, and that the project stays on track

### **Departmental Representatives**

A user representative for each affected department should be appointed. These critical appointments may well determine the success of the Accela Civic Platform implementation.

The departmental representative(s) should have a clear understanding of all the business processes that the Accela Civic Platform will affect within their department, and how those business processes cross departmental boundaries. Ideally, they will have been involved in the initial purchasing decision and have a solid understanding of how the system will interact with departmental business processes. They will be the initial contact person within a department for all issues before, during, and after the implementation. These individuals should be able to make solid business decisions, and have a vested interest in the success of the implementation of the system. Additionally, the ability to effectively communicate with their peers and the project team will be essential. Confidence that the right decisions are being made will promote acceptance by the general user community.

Schedule flexibility will be expected of the departmental representatives, as there will be crucial periods in the implementation process that will require dedicated time.

Responsibilities include:

- Attending the project kick-off and initial workshop training
- Willingness and ability to gather data and make decisions about business processes
- Assisting in creating the specifications for custom modifications
- Reviewing and testing the completed modifications
- Participating in the implementation of the Accela Civic Platform solution

Recommended Requirements:

- Excellent communication skills
- Clear understanding of the user's perspective and needs
- Clear understanding of the current business processes



## PAYMENT AND TASK SIGNOFF

Invoices will be provided to the Agency at the end of each month for services provided on project tasks that month. Total billing for each task cannot exceed the total amounts listed above for each task without an agreed upon change order by all parties. Actual Expenses will be billed monthly.

### Services Budget

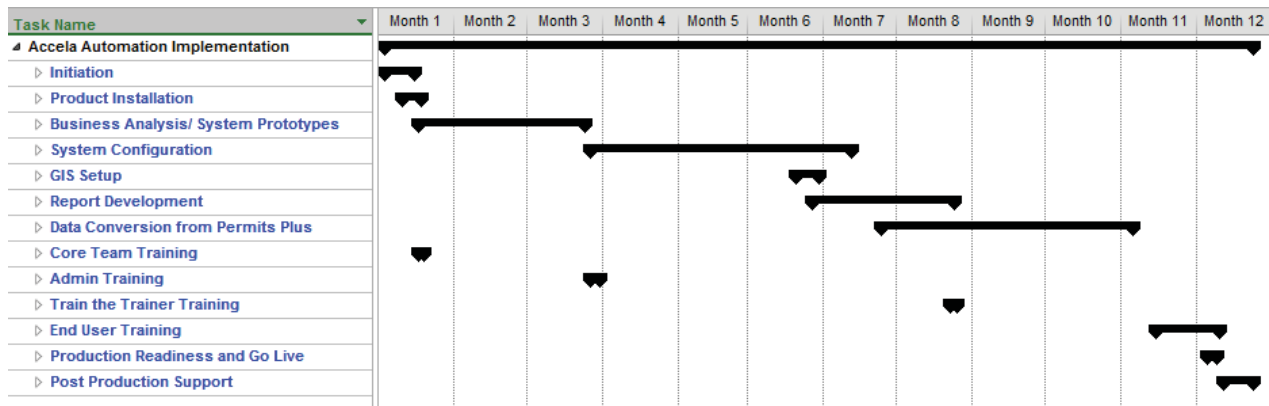
Task	Hours	Rate	Amount	
Project Management	220	\$175	\$38,500	Standard PM time for the duration of the project
Installation	16	\$175	\$2,800	Setup on Accela Hosted site
Configuration Analysis	240	\$175	\$42,000	Basic Configuration for Building, Planning, Engineering and Code (14 record types)
System Configuration	320	\$175	\$56,000	Will use other client examples as a starting point for the configuration and best practice templates whenever possible.
Event Management Scripts	80	\$175	\$14,000	Scripts to add additional Automation to business processes including interface to CA State Lic. Board
APO - Conversion	48	\$175	\$8,400	Initial population of Address, Parcel and Owner data
Historical Data Conversion (Permits Plus)	340	\$175	\$59,500	Permits Plus data conversion
Interface - Business License - Hdl	56	\$175	\$9,800	Update Business Lic Expiration Date in Accela
Payment Export to MUNIS	32	\$175	\$5,600	Extract of payment data form Accela in specified format
Report Development	120	\$175	\$21,000	Basic Permit, Receipt, and Finance reports in Crystal. Ad-hoc report writer will be used as much as possible for additional reports.
Training (Train the Trainer)	52	\$175	\$9,100	Basic training for the main power users. End users will be trained by City staff using train the trainer approach.
Accela Citizen Access Configuration	112	\$175	\$19,600	Permit research, Inspection scheduling and Basic over the counter permit application, payment and issuance on-line.
Accela GIS Configuration	52	\$175	\$9,100	Basic map integration to ESRI
Accela Mobile Office	40	\$175	\$7,000	Accela Mobile Apps
User Acceptance Testing / Go Live Prep	80	\$175	\$14,000	Final system testing
Go Live Support	40	\$175	\$7,000	3 days on-site during go live week plus additional time over first month
<b>Service Totals</b>	<b>1,848</b>		<b>\$323,400</b>	

## EXPENSES

All out-of-pocket travel & lodging expenses incurred by TruePoint resources in the performance of this Scope of Services are included in the Budgetary Estimate. Out-of-pocket travel and living expenses include travel time, airfare, transportation, lodging, parking, and meals. Total travel and travel time expenses shall not exceed \$20,000.

## PROPOSED PROJECT TIMELINE

The term of this project is estimated to be 12 months based on the current project scope. Any changes to project scope may increase the project duration and may require a Change Order for additional Services fees. Furthermore, any significant delays (e.g., Change in staff level/availability, missed deadlines) to the Project Timeline, which by mutual agreement were created by the Agency and will result in an increase in the duration of the project, will require a Change Order to reimburse TruePoint for the additional costs associated with the delay, including but not limited to, additional hours for project management, deliverable development and review.



## APPENDIX A: CHANGE ORDER FROM Change Order

Agency:	CO #:	01	
Project:	Date:		
Contract #:	Date:		
Amendment #:	Date:		
Lease Agreement #:			
SOW #:			
Initiating Department:			
Initiated By:			
Change Category:	<input type="checkbox"/> Product	<input type="checkbox"/> Project	<input type="checkbox"/> Contract
Priority:	<input type="checkbox"/> High/Critical	<input type="checkbox"/> Medium	<input type="checkbox"/> Low

**PROJECT CHANGE DESCRIPTION/TASK SUMMARY:**

1. <issue name>
  - issue details / scope impact:
  - schedule impact:
  - resource impact:
  - cost impact:
  
2. <issue name>
  - issue details / scope impact:
  - schedule impact:
  - resource impact:
  - cost impact:

Total Project Schedule Impact:  
 Total Project Resource Impact:  
 Total Project Cost Impact:

**DISPOSITION COMMENTS:**

Disposition:  Approved  Rejected  Closed  See Comments  
 Date:

## Signature and Acceptance

The above Services will be performed in accordance with this Change Order/Work Authorization and the provisions of the Contract for the purchase, modification, and maintenance of the Accela systems. The approval of this Change Order will act as a Work Authorization for TruePoint and/or Agency to perform work in accordance with this Change Order, including any new payment terms identified in this Change Order. This Change Order takes precedent and supersedes all other documents and discussions regarding this subject matter.

Scope of Work

## Enterprise GIS Implementation

Prepared For:



Produced By:



**VESTRA Resources, Inc.**

5300 Aviation Drive

Redding, CA 96002

(530) 223-2585

[www.vestra.com](http://www.vestra.com)

September 7, 2016



## VESTRA'S QUALIFICATIONS...

Since 1988, VESTRA Resources, Inc. has been an industry leader in Enterprise GIS design, customization and implementation. As an Esri Certified Gold Partner we are part of their ArcGIS Online Specialty, ArcGIS for Local Government Specialty, and Federal Small Business Specialty Programs. We offer products and services to clients of all sizes in federal, state, local government and private organizations, nationally.

### CORE COMPETENCIES:

- ◆ GIS System Architecture Design & Implementation
- ◆ GIS Application Development (Desktop, Web, Mobile)
- ◆ GIS Strategic Planning & Needs Assessments
- ◆ GIS Data Management & Modeling
- ◆ Geodatabase Design & Development
- ◆ ArcGIS Online for Organizations
- ◆ Portal for ArcGIS Implementations
- ◆ Mission Critical Enterprise GIS Monitoring
- ◆ Mobile Development & Field Data Collection
- ◆ GIS Solutions Architecture
- ◆ GIS Analytics
- ◆ CAD to GIS Data Migration & Conversion
- ◆ 3D Visualization & Modeling
- ◆ GIS Training & Support

## WHAT SETS VESTRA APART FROM THE COMPETITION?

- ◆ Highly successful modernizations and migrations of Enterprise GIS systems to Esri's WebGIS Model
- ◆ Extremely talented team of Enterprise GIS system architects with over 35 years of experience
- ◆ JavaScript development expertise with over 46 years of combined software development experience
- ◆ Outstanding Enterprise GIS monitoring software
- ◆ High client retention rate of 93% due to excellent client responsiveness
- ◆ Flexible resources with competitive pricing

## A FEW REFERENCES...

**City of Novato (2016 – Present) | Population: 54,194**

**Scott Sanders, GIS Supervisor**

**922 Machin Ave, Novato CA 94945**

**(415) 899-8909 | [ssanders@novato.org](mailto:ssanders@novato.org)**

VESTRA is currently under contract with the City of Novato to provide an Enterprise GIS implementation. The City envisions their EGIS to be foundational in how the City conducts business going forward. They would like GIS to empower business processes and workflows across the City. It will provide a platform for City staff to access and share authoritative data and information via modern web applications that provide a robust set of tools to perform tasks.



**City of Emeryville (2010 – Present) | Population: 10,777**

**Michael Parenti, Information Technology Manager**

**1333 Park Avenue, Emeryville, CA 94602**

**(510) 450-7803 | [mparenti@emeryville.org](mailto:mparenti@emeryville.org)**

In 2010, VESTRA initiated work with the City of Emeryville to configure and implement an Enterprise GIS. The project began with a high-level needs assessment to identify current and potential uses of GIS technology within the City. Based on the results of this assessment, VESTRA developed the system architecture for their Enterprise GIS platform. VESTRA supported the City with implementing this architecture by installing and configuring desktop and server GIS software, creating a master geodatabase, and providing training to staff on the use and management of the platform.



Following the implementation, VESTRA has supported the City by providing technical support, geodatabase conversion and editing, and custom GIS application development.

**City of Mountain View (2011 – Present) | Population: 70,846**  
**Steve Rodriguez, IT Operations Manager**  
**PO Box 7540, 500 Castro Street, Mountain View, CA 94039-7540**  
**(650) 903-6667 | [steve.rodriguez@mountainview.gov](mailto:steve.rodriguez@mountainview.gov)**



The City of Mountain View implemented an Enterprise GIS to streamline and improve the current use of GIS within the City. VESTRA worked with the city through the entirety of the project, from a comprehensive needs assessment, to initial design and development, to final implementation. Recent efforts include implementing a WordPress based map gallery with a variety of web mapping applications. One example is the internal parcel viewer which is a culmination of prior efforts that standardized data schemas based on Esri Local Government Information Models (LGIM), established common editing workflows, and publishing procedures. The parcel viewer developed using Esri's Web AppBuilder allows staff to query parcel information in support of their business processes. The public web app gallery can be viewed at <http://maps.mountainview.gov>. The City fully leveraged its GIS Portal, ArcGIS for Server and web apps using Esri's Web AppBuilder.

**City of Medford (2014 – Present) | Population: 77,677**  
**David Pastizzo, GIS Coordinator**  
**411 West 8th Street, Medford, OR 97501**  
**(541) 774-2053 | [david.pastizzo@cityofmedford.org](mailto:david.pastizzo@cityofmedford.org)**



VESTRA performed the ArcGIS for Server upgrade for the City of Medford. The City upgraded its ArcGIS for Server and Enterprise Geodatabase infrastructure from 10.1 and 10.2. VESTRA performed requirements gathering, upgrade and migration planning, and testing activities. The project also included migrating the City's legacy Silverlight web applications to modern HTML5/JavaScript based web applications, including the development of advanced widgets that perform complex querying and reporting.

**City of Redding (2014 – Present) | Population: 91,119**  
**Devon Hedemark, GIS Supervisor**  
**777 Cypress Ave, Redding CA 96001**  
**(530) 225-4391 | [dhedemark@ci.redding.ca.us](mailto:dhedemark@ci.redding.ca.us)**



VESTRA is currently working with the City of Redding to migrate their legacy, high usage Enterprise GIS web applications to modern Portal and Web AppBuilder based web apps. The legacy applications use Adobe Flex technology. Besides developing custom Web AppBuilder widgets that support City business processes, VESTRA performed the upgrade of the City's ArcGIS for Server from version 10.1 to version 10.3.1. The City made the change to migrate to the latest Esri platform and take advantage of the latest functionalities that it provided.

## CLIENT TESTIMONIALS

*"VESTRA Resources, Inc. developed eWRIMS for the State Water Board. VESTRA was chosen because of cost and because it was believed they had the expertise to undertake this very complex custom development. We chose correctly, VESTRA performed in a very professional manner, with a skill set that is hard to find. Given the opportunity I would work with them again."*

**Leo Anguiano** | Senior GIS Manager  
California State Water Resources Control Board

*“VESTRA has functioned as an extension of the cities GIS team; filling knowledge gaps and providing staff resources to help complete projects on schedule and within budget. VESTRA helped us design and implement a new Enterprise GIS architecture and developed a custom Web AppBuilder widget which allowed us to retire our highly custom legacy land information system. Our success has always been VESTRA’s top priority. They are an exceptionally skilled and professional group that we continue to work with and unequivocally recommend.”*

**David Pastizzo** | GIS Manager  
City of Medford

*“We worked with VESTRA Resources, Inc. to help us implement the upgrade to our Enterprise GIS. They were extremely valuable to our success! I can’t give them enough praise for the quality of work they do, the speed at which they deliver projects, and the professionalism they’ve show in our working relationship.”*

**Steve Rodriguez** | IT Manager  
IT Division, FASD Department, City of Mountain View

*“VESTRA Resources, Inc. has provided OSHPD with invaluable support and is what I consider my go-to team for GIS custom development on any GIS project. I have always found them extremely professional, and knowledgeable, with the ability to provide out-of-the-box solutions while managing a budget. I highly recommend them.”*

**Michael O’Neill** | Geospatial Solutions Coordinator  
California Office of Statewide Healthcare Planning and Development

## LOCAL GOVERNMENT TEAM BIOS

**Solomon Pulapkura** *(primary contact)*  
*Sr. GIS Analyst / GIS Specialist*

Solomon Pulapkura is a Senior GIS Analyst / GIS Specialist for VESTRA with over 10 years of experience in implementing a wide variety of GIS solutions for municipal, county and state governments. He has worked with cities such as Mountain View, Lathrop, Emeryville, Oakland, and Medford with the management of their Enterprise GIS. In addition, he has assisted counties including Shasta, Tehama, Lassen and Siskiyou with GIS projects of all levels of complexity. Solomon successfully implemented Geocortex web application solutions for San Francisco Public Utilities Commission and Orange County. Solomon has conducted numerous GIS needs assessments and participated in developing GIS solutions to meet those needs. He has helped organizations he’s worked with streamline their business processes and workflows by leveraging GIS. This includes workflows that incorporate feedback loops using redlining and commenting tools that help update and correct Enterprise GIS data. He is detail oriented, resourceful, and accurate, with strong analytical and problem solving skills, and the ability to multi-task, reach project goals, and meet tight deadlines.

- In-depth knowledge of GIS system architecture design, and GIS database design.
- Strong background in the implementation of web mapping applications using Esri technologies.
- Experience with solutions for emergency operations.
- In-depth experience providing solutions to municipal government in the areas of GIS data maintenance, basemap enhancements, web applications for citizen outreach and engagement, public safety operations and mobile GIS applications for field personnel.
- Successful history in GIS technical support and training.

## **Art Stackhouse**

### ***Enterprise Architect***

Art Stackhouse is the President of VESTRA Resources, Inc., and has over 40 years of experience in Enterprise GIS Platform management, assessing GIS needs of municipal government staff and the constituents they serve, identification of innovative GIS solutions, implementation of GIS concepts and best practices, and development, and implementation of Enterprise GIS platforms. Art has participated as a senior member of VESTRA's Enterprise GIS team on a wide array of projects. He has been actively involved with advanced Enterprise GIS implementations at San Francisco Public Utility Commission, City of Mountain View, City of Oakland, City of Emeryville, Sonoma County Water Agency, Caltrans, CAL FIRE, California Office of Statewide Health Planning and Development, and counties including Shasta, Calaveras, Napa, Mendocino, Lake, Lassen, and Contra Costa. Because of his experience, Art provides senior level program management, oversight and quality assurance/quality control on many of VESTRA's projects. As the President of VESTRA, Art has an overall responsibility for all projects undertaken by VESTRA, and coordinates the personnel, hardware, and software needed to complete each project.

- Advanced understanding of GIS technology, Esri products, tools, applications, and services.
- Long-term experience with management of complex projects and client relationships.
- Defining and executing plans for meeting municipal government Enterprise GIS needs.
- Experience with collaborative use of local, state and federal GIS data repositories.

## **Davin Laine**

### ***Systems Architect / Systems Engineer***

Davin Laine is a Systems Architect / Systems Engineer for VESTRA, and has over 34 years of systems design and management experience. Throughout his years of experience, Davin has developed creative IT solutions for various businesses which demanded strong IT experience and application of GIS architecture design best practices. He has a wide range of experience integrating GIS and other departmental database applications and systems using advanced system architecture design with industry best practices. He is an expert in designing systems that streamline retrieval and visualization of third party business system information (e.g. permitting, code enforcement, planning, building inspections, property valuations, etc.) through integration with inside-facing GIS applications.

- Design, development, and testing of systems for hundreds of government projects at the municipal, county, and state levels.
- Advanced IT systems expertise and knowledge.
- Enterprise GIS integration with other business systems such as maintenance management systems, property databases, permitting systems, etc.

## **Clancy Finmand**

### ***Sr. GIS Technician***

Clancy Finmand is a GIS Analyst for VESTRA, with over 35 years of experience in Public Safety, and 13 years of experience in GIS practices, procedures and analysis operations. With exceptional knowledge of Esri technology, and database design, creation, and maintenance, Clancy has become an extremely valuable addition to the VESTRA team. He has proven success in developing, implementing and monitoring projects and programs, including GIS design, budget development, implementation, monitoring and training.

- Exceptional knowledge of GIS database design and maintenance.
- Excellent knowledge of leadership, management, and supervision procedures, practices, and skills.
- Over 35 years of experience in the design and development of training materials and presentations




## PROJECT UNDERSTANDING

The City of Paso Robles (City) is seeking to acquire professional services to help implement an Enterprise GIS (EGIS). The EGIS will provide a platform for City staff to access and share authoritative GIS data and information and also integrate with third party enterprise business systems such as Accela, InfraMap and others.

## SCOPE OF WORK

The following Scope of Work, along with its activities and tasks represents VESTRA's methodical approach toward meeting the City's Enterprise GIS Implementation needs.

**NOTE:** VESTRA always strives to provide the best value and experience for clients. This proposal includes optional value added services indicated by a friendly  symbol.

### TASK 1: KICKOFF MEETING AND REQUIREMENTS GATHERING

VESTRA will begin the project with an up to one (1) hour on-site kickoff meeting, with the City's project team and/or project sponsor(s). This meeting is designed to perform formal VESTRA and City project team introductions, confirm the primary stakeholders, review and confirm the project scope of work, schedule, budget, establish guidelines, and reach an agreement on protocols for change control, communications, and project closing processes, as needed.

Immediately following the kick off meeting, VESTRA will conduct an up to seven (7) hour requirements gathering session with the City's technical staff. VESTRA will seek to gain a more in-depth understanding of the current GIS infrastructure. The discussion will include, but is not limited to, current system hardware, software, AutoCAD and/or GIS data, , licensing, network diagrams and any integrations with other business systems (e.g. Accela, InfraMap, Asset and Work Order Management Systems, Permitting Systems, etc.). All information gathered will be geared toward not only understanding the current system, but also to understand what the future goals of the City are with GIS in order align the new, robust GIS infrastructure with those goals.

VESTRA will spend a portion of the time reviewing existing data and determining priority datasets. During meetings with the individual departments, VESTRA will seek to understand current business processes, workflows, data needs and application needs.

#### Task 1 Deliverables

1. Project kick off meeting
2. Technical memorandum including agreed upon protocols for change control, communications, and project closing processes, as needed

#### Task 1 Assumptions, Constraints, and/or Exclusions

1. Meeting will be conducted at City offices, and attended by VESTRA and City project teams and/or project sponsor(s).
2. Meeting invitations and agenda will be sent prior to the meeting. VESTRA and City project managers will work on scheduling the meeting.
3. An internet enabled conference room that includes equipment for presenting will be arranged for by the City.

- On-site meetings will be followed by GoToMeetings and/or phone calls to gather additional information, as needed.

## TASK 2: SYSTEM DESIGN

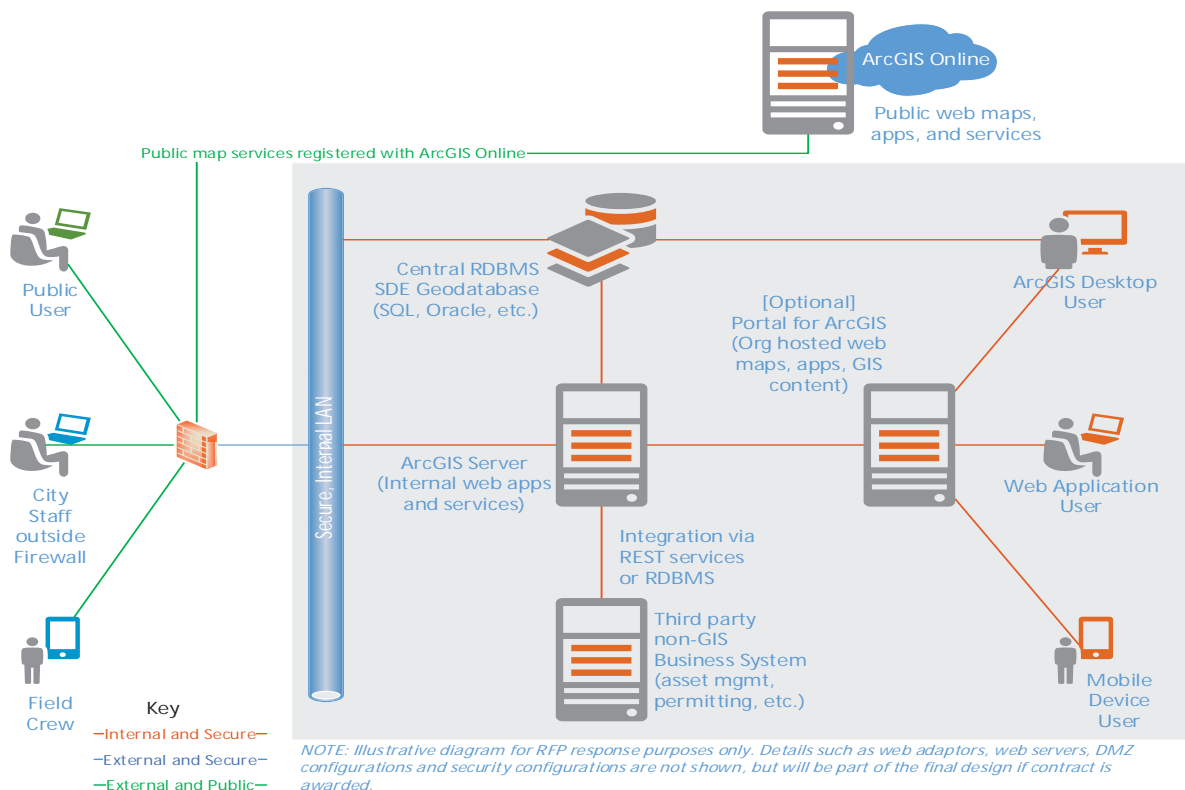
After performing the requirements gathering and based on an understanding of the current infrastructure, VESTRA will develop a recommended system architecture design utilizing Esri software. The recommended system design will be based on industry standards and will be an effective physical system configuration that allows flexibility and scalability for future growth and usage. A system design document will be developed which will include a high-level description of each architecture component.

VESTRA will submit a draft architecture diagram for the City's review. The City will review the architecture diagram and provide feedback to VESTRA within ten (10) business days. VESTRA will make any changes based on City's feedback and submit the final architecture diagram and a high-level system design document that describes the architecture, for approval.

## CONCEPTUAL ARCHITECTURE

The following diagram presents a high-level and conceptual hybrid architecture, to illustrate one of the many ways a new GIS infrastructure can be implemented. The hybrid architecture includes on-premise ArcGIS for Server(s) and leverages items hosted in ArcGIS Online.

**NOTE:** As mentioned, the diagram provided is illustrative and should not be read as VESTRA's proposed architecture or preferred architecture for the City, at this time. Any finalization of design will occur only after a formal requirements gathering per Task 1. The final design may be different from the diagram shown below.



### Task 2 Deliverables

1. Draft Architecture Drawing
2. Final System Architecture Drawing
3. System Design Document

### Task 2 Assumptions, Constraints, and/or Exclusions

1. The system design will be limited to enterprise GIS related IT system architecture at the City.

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## TASK 3: ENTERPRISE GIS DATABASE DESIGN

In this task, VESTRA will design the Enterprise GIS Database for the City. VESTRA will use the industry standard Esri Local Government Information Model (LGIM) as a starting point to design the database model and schemas of various GIS datasets. VESTRA will work closely with the City to review existing GIS dataset field and attribute information and determine equivalent destination LGIM feature classes. The cost estimate includes costs for converting up to 5 existing core datasets in GIS format to the LGIM data model.

A file geodatabase will be created with the final design of the 5 datasets. The file geodatabase will have empty datasets with the finalized schema. Actual migration of data to the finalized schema will be performed by City staff.

### Task 3 Deliverables

1. File geodatabase with up to 5 feature classes in LGIM schema
2. High-level data model and conversion documentation

### Task 3 Assumptions, Constraints and Exclusions

1. City GIS staff will provide input during the database design effort and assist in identifying 5 core datasets, field mapping and destination LGIM feature classes.
2. The City has about 200 datasets it would like to eventually convert to the LGIM schema. The conversion of 5 datasets by VESTRA will set a pattern for the City to follow for the remaining datasets. VESTRA will transfer knowledge over the course of this task that will help the City take on the conversion of the rest of the datasets. This helps keep costs low for the City. If the City would like VESTRA to migrate all 200 datasets to the LGIM schema, VESTRA will adjust scope and costs accordingly.

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## TASK 4: ENTERPRISE GIS IMPLEMENTATION

In this task, VESTRA will implement the system according to the system design and architecture developed in Task 2. This task includes the following sub-tasks:

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### TASK 4.1 INSTALL AND CONFIGURE GIS SOFTWARE

During this task, VESTRA will install and configure GIS software and licensing required by the new platform. This task will be performed during an up to one (1) day on-site visit. The installation and configuration is anticipated to include the following components (but will be determined by requirements identified in Task 1):

- One (1) ArcGIS for Desktop Standard
- One (1) ArcGIS for Server
- Internal and external web adaptor configurations

- Enterprise SDE Geodatabase
- ArcGIS License Manager
- Security and Authentication (at database, server and/or portal levels)
- Data and Service publishing and testing
- (Optional) GeoSystems Monitor Enterprise GIS Monitoring Software

ArcGIS for Server is anticipated to be installed in a virtual environment. VESTRA will provide specifications for the virtual machines to be deployed. A new enterprise geodatabase will be deployed in an SQL Server environment (must be licensed separately from Esri software licensing) or similar.

VESTRA will provide complete documentation of the entire install and configuration process for every component that is installed. The documentation will include screenshots and text content that will outline the same step by step process VESTRA will use to perform the installation and configuration. This document can be used as a future reference guide by City staff during maintenance and administration of the system.

#### Task 4.1 Deliverables

1. Installation and configuration of ArcGIS software
2. Detailed documentation for software components installed by VESTRA

#### Task 4.1 Assumptions, Constraints, and/or Exclusions

1. VESTRA will install and configure software components related to GIS architecture only. The City will implement all other architecture components (as needed) such as virtualization, DNS settings, hardware changes, etc.
2. To be efficient, VESTRA will provide knowledge transfer to one (1) City staff person at any given time. The City may choose to change staff based on their area of expertise for the knowledge transfer. For example, the ArcGIS for Server administrator will participate in server installation; the database administrator will participate in database migration and setup.
3. The cost estimate does not include time that might be needed to resolve and troubleshoot technical issues and delays outside of VESTRA's control that might be caused by version, platform, and architecture changes. VESTRA will log any such issues or risks and communicate with the City any proposed resolutions, along with anticipated cost and schedule changes, if needed.



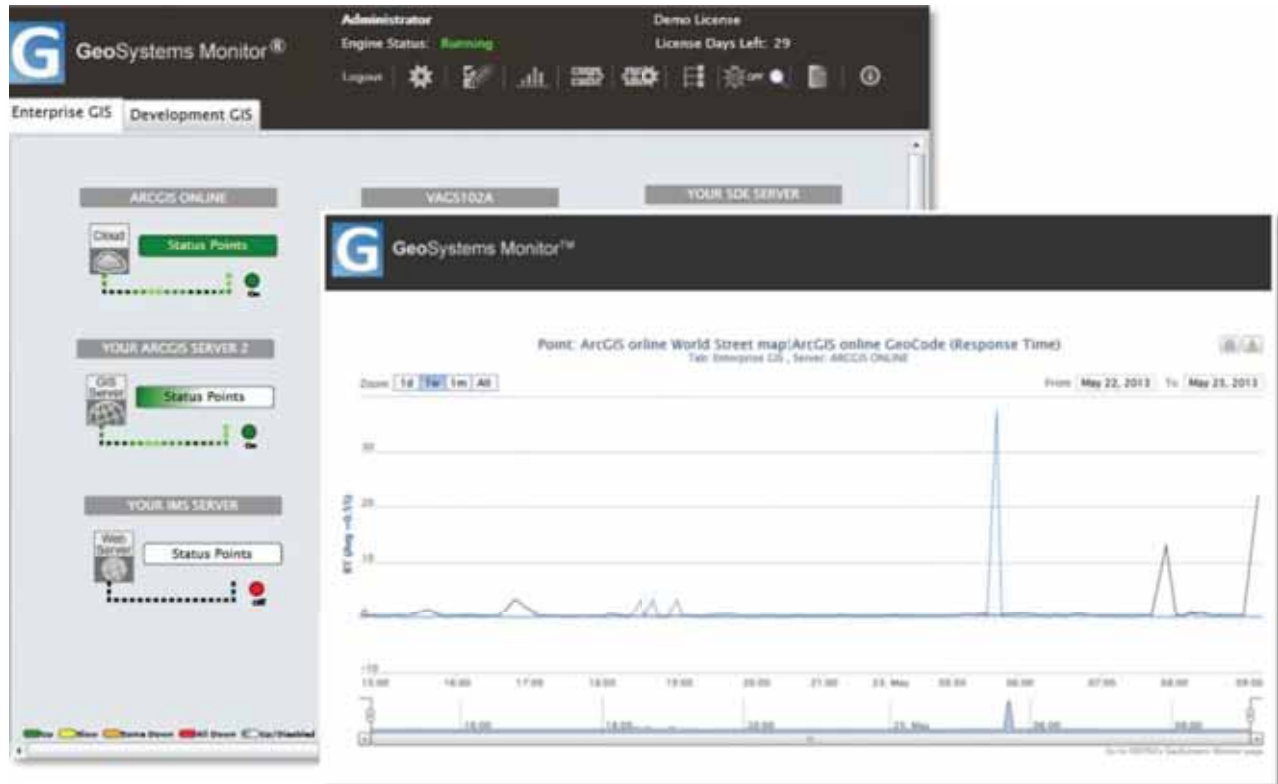
#### TASK 4.2 (OPTIONAL) INDUSTRY LEADING ENTERPRISE GIS SYSTEM MONITORING

If the City so chooses, the installation will include an optional and free<sup>1</sup> implementation of VESTRA's GeoSystems Monitor demo license. The latest Enterprise GIS Systems are highly complex, and effective maintenance of such systems requires quick reaction and response to downtimes. The GeoSystems Monitor is an IT best practice product that increases the reaction time of GIS/IT staff to system events via text or email alerts and notifications. Installation of the GeoSystem Monitor will help the City monitor and track performance of the newly implemented system, ensure longevity and be confident about the investment made. VESTRA will install and configure the GeoSystems Monitor for the new system, so the City can immediately begin realizing its benefits. To learn more, please visit:

<http://www.vestra.com/gis/products/geosystems-monitor>.

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<sup>1</sup> Includes a six (6) month free and fully functional trial license.



#### Task 4.2 Deliverables

1. (Optional) Installation and configuration of GeoSystems Monitor for the new system

#### Task 4.2 Assumptions, Constraints, and/or Exclusions

1. VESTRA will perform the minimum required configuration of GeoSystems Monitor.
2. To be efficient, VESTRA will provide knowledge transfer to one (1) City staff person at any given time.
3. The cost estimate does not include time that might be needed to resolve and troubleshoot technical issues and delays outside of VESTRA's control that might be caused by version, platform, and architecture changes. VESTRA will log any such issues or risks and communicate with the City any proposed resolutions, along with anticipated cost and schedule changes, if needed.

#### TASK 4.3: DATA MIGRATION

VESTRA will migrate up to 5 datasets into the Enterprise GIS database. All layers will use the final schema and field mapping developed during Task 3.

During the requirements gathering in Task 1, VESTRA and the City will identify the datasets that will be converted.

#### Task 4.3 Deliverables

1. GIS Data Migration of up to 5 datasets

#### Task 4.3 Assumptions, Constraints, and/or Exclusions

1. The City will make available staff that will act as information resources to support the migration effort.
2. The City has about 200 datasets it would like to eventually migrate. The migration of 5 datasets by VESTRA will set a pattern for the City to follow for the remaining datasets. This helps keep costs low for the City. If the City would like VESTRA to migrate all 200 datasets, VESTRA will adjust scope and costs accordingly.

**TASK 5: GIS TRAINING**

VESTRA will conduct a one (1) day hands-on training session via Webinar for designated City staff. Anticipated training topics include:

1. Publishing services to ArcGIS for Server

VESTRA will prepare high-level training material.

**Task 5 Deliverables**

1. Training
2. Training material

**Task 5 Assumptions, Constraints, and/or Exclusions**

1. Training will be geared toward helping staff get started with using ArcGIS for Server. The training assumes that City staff have a basic understanding of ArcGIS Desktop.
2. Training on system installation and configuration is part of Task 4, and so is not included as part of this task.

**PROPOSED SCHEDULE**

The tentative project schedule is provided below. VESTRA anticipates completing the project in ten (10) weeks, once the project has begun.

TASK/WEEK	1	2	3	4	5	6	7	8	9	10
1 Kickoff Meeting and Requirements Gathering	█	█								
2 System Design		█	█							
3 Enterprise GIS Database Design			█	█	█	█				
4 Enterprise GIS Implementation						█	█	█	█	
5 Training										█
6 Project Management	█	█	█	█	█	█	█	█	█	█

Please note that although a time limit for project completion has been specified above, some of the activities will be performed on an as-needed basis. This may lead to a revision of the schedule based on City priorities.


**FEE SCHEDULE**

This estimate is provided on a time-and-materials, not-to-exceed basis, with a maximum cost of \$19,963.48. The actual hours incurred by each staff resource may vary during actual contract work. It is assumed that it is permissible for resources to be re-allocated based upon work, as long as the maximum cost is not exceeded.

Task Description	Staff Classification	Hourly Rate	Hours	Cost
<b>1 Kickoff Meeting and Requirements Gathering</b>				
Kickoff Meeting and Requirements Gathering	Systems Engineer	\$114.00	8	\$912.00
	Sr. GIS Specialist	\$128.40	8	\$1,027.20
Meeting Summary Notes	Sr. GIS Specialist	\$128.40	4	\$513.60
Travel Costs				\$1,000.00
<b>Total Task 1</b>			<b>20</b>	<b>\$3,452.80</b>
<b>2 System Design</b>				
Final System Architecture Drawing	Systems Engineer	\$114.00	8	\$912.00
	Sr. GIS Specialist	\$128.40	4	\$513.60
System Design Document	Systems Engineer	\$114.00	16	\$1,824.00
	Sr. GIS Specialist	\$128.40	4	\$513.60
<b>Total Task 2</b>			<b>32</b>	<b>\$3,763.20</b>
<b>3 Enterprise GIS Database Design</b>				
File Geodatabase	Sr. GIS Specialist	\$128.40	24	\$3,081.60
Documentation	Sr. GIS Specialist	\$128.40	8	\$1,027.20
<b>Total Task 3</b>			<b>32</b>	<b>\$4,108.80</b>
<b>4 Enterprise GIS Implementation</b>				
ArcGIS Server Configuration	Systems Engineer	\$114.00	16	\$1,824.00
(Optional) GeoSystems Monitor Installation and Configuration	<i>Systems Engineer</i>	<i>\$114.00</i>	0	\$0.00
ArcGIS Online Set-up	Sr. GIS Specialist	\$128.40	0	\$0.00
Installation Documentation	Systems Engineer	\$114.00	16	\$1,824.00
Travel Costs				\$730.00
<b>Total Task 4</b>			<b>32</b>	<b>\$4,378.00</b>
<b>5 Training</b>				
Training	S. GIS Specialist	\$128.40	8	\$1,027.20
Material prep	Sr GIS Analyst	\$100.00	8	\$800.00
<b>Total Task 5</b>			<b>16</b>	<b>\$ 1,827.20</b>
<b>6 Project Management</b>				
Project Management and Administration	Project Manager	\$141.03	16	\$2,256.48
	Admin Staff	\$59.00	3	\$177.00
<b>Total Task 7</b>			<b>19</b>	<b>\$ 2,433.48</b>
<b>All Task Totals</b>			<b>151</b>	<b>\$19,963.48</b>

### VESTRA'S RATE SCHEDULE

VESTRA is offering our CMAS/GSA Rates in this response (from CMAS Contract No. 3-12-70-1650C and GSA Contract No. GS-35F-353AA).

 VESTRA Resources Rates			
GSA Job Title	VESTRA Commercial Rates	Discount	VESTRA CMAS / GSA Rates
Principal / GIS Program Manager	\$ 212.00	15%	\$ 180.85
Sr. Project Manager	\$ 180.00	10%	\$ 162.00
Project Manager	\$ 180.00	22%	\$ 141.03
Enterprise Architect	\$ 200.00	21%	\$ 158.00
Solution Architect	\$ 160.00	13%	\$ 140.00
Systems Architect	\$ 178.00	16%	\$ 150.00
Systems Engineer	\$ 158.00	28%	\$ 114.00
Software Architect	\$ 175.00	15%	\$ 148.00
Sr. GIS Programmer	\$ 175.00	22%	\$ 137.00
GIS Programmer	\$ 145.00	23%	\$ 111.00
Sr. GIS Specialist	\$ 164.00	22%	\$ 128.40
GIS Specialist	\$ 145.00	25%	\$ 109.00
Sr. GIS Analyst	\$ 140.00	29%	\$ 100.00
GIS Analyst	\$ 110.00	25%	\$ 82.00
Sr. GIS Technician	\$ 100.00	31%	\$ 69.00
GIS Technician	\$ 90.00	40%	\$ 54.00
Administrative Assistant	\$ 90.00	34%	\$ 59.00
	<b>Average Percent Discount</b>	<b>23%</b>	