BREVARD COUNTY
BOARD OF COUNTY COMMISSIONERS

CONTRACT REVIEW AND APPROVAL FORM

SECTION I - GENERAL INFORMATION

1. Contractor: Accela, Inc.	**2. Amount:** $5,305,498.18
3. Fund/Account #: 1080 / 257040 / 5640300	**4. Department Name:** Planning & Development
5. Contract Description: Accela Cloud Service Licenses, Migration, and Modernization	
6. Contract Monitor: Kathleen Schindler	**8. Contract Type:** USE AGREEMENT
7. Dept/Office Director: Tad Calkins	
9. Type of Procurement: Sole / Single Source	

SECTION II - REVIEW AND APPROVAL TO ADVERTISE

COUNTY OFFICE	APPROVAL YES	APPROVAL NO	SIGNATURE
User Agency	☑	☐	
Purchasing	☐	☐	
Risk Management	☐	☐	
County Attorney	☐	☐	

SECTION III - REVIEW AND APPROVAL TO EXECUTE

COUNTY OFFICE	APPROVAL YES	APPROVAL NO	SIGNATURE
User Agency	☑	☐	Calkins, Tad — Digitally signed by Calkins, Tad Date: 2024.12.31 09:52:54 -05'00'
Purchasing	☑	☐	Bowers, Mary — Digitally signed by Bowers, Mary Date: 2024.12.31 11:07:32 -05'00'
Risk Management	☑	☐	Watson, Michael — Digitally signed by Watson, Michael Date: 2024.12.31 10:21:03 -05'00'
County Attorney	☑	☐	Balser, Heather — Digitally signed by Balser, Heather Date: 2024.12.31 10:04:19 -05'00'

SECTION IV - CONTRACTS MANAGEMENT DATABASE CHECKLIST

CM DATABASE REQUIRED FIELDS	Complete ✓
Department Information	☐
Department	☐
Program	☐
Contact Name	☐
Cost Center, Fund, and G/L Account	☐
Vendor Information (SAP Vendor #)	☐
Contract Status, Title, Type, and Amount	☐
Storage Location (SAP)	☐
Contract Approval Date, Effective Date, and Expiration Date	☐
Contract Absolute End Date (No Additional Renewals/Extensions)	☐
Material Group	☐
Contract Documents Uploaded in CM database (Contract Form with County Attorney/ Risk Management/ Purchasing Approval; Signed/Executed Contract)	☐
"Right To Audit" Clause Included in Contract	☐
Monitored items: Uploaded to database (Insurance, Bonds, etc.)	☐

BREVARD County
BOARD OF COUNTY COMMISSIONERS

FLORIDA'S SPACE COAST

Kimberly Powell, Clerk to the Board, 400 South Street • P.O. Box 999, Titusville, Florida 32781-0999

Telephone: (321) 637-2001
Fax: (321) 264-6972
Kimberly.Powell@brevardclerk.us

RECEIVED
JUL 29 2024
BY:

July 24, 2024

MEMORANDUM

TO: Tad Calkins, Planning and Development Director

RE: Item F.1., Approval to Enter into Negotiations for Accela Civic Platform Cloud Services Licenses, and for Associated Migration and Modernization Project

The Board of County Commissioners, in regular session on July 23, 2024, authorized staff to enter into negotiations with Accela to procure Accela Civic Platform SaaS user licenses, migrate to the SaaS model, and modernize Brevard County's Accela Civic Platform configuration; authorized the County Manager to execute order forms, agreements, task orders, change orders, modifications, and amendments, provided that the cost is not to exceed the figures listed in the fiscal impact of this report; and authorized the County Manager to establish the necessary budget to implement this SaaS upgrade and implementation.

Your continued cooperation is always appreciated.

Sincerely,

BOARD OF COUNTY COMMISSIONERS
RACHEL M. SADOFF, CLERK

Kimberly Powell

Kimberly Powell, Clerk to the Board

/ns

cc: County Manager
Central Services
Finance
Budget

File #: 6949, **Version:** 1

Subject:

Approval to Enter into Negotiations for Accela Civic Platform Cloud Services License/s, and for Associated Migration and Modernization Project

Fiscal Impact:

Accela SaaS Migration/Modernization
FY 25: $2,666,674

Accela Civic Platform SaaS Annual User Licenses, Storage, and Enhanced Reporting Database
FY 25: $478,312.00
FY 26: $502,227.60
FY 27: $527,338.98
FY 28: $553,705.93
FY 29: $581,391.22

Dept/Office:

Planning and Development

Requested Action:

It is requested that the Board of County Commissioners: (1) authorize staff to enter into negotiations with Accela to procure Accela Civic Platform SaaS user licenses, migrate to the SaaS model, and modernize Brevard County's Accela Civic Platform configuration; and (2) authorize the County Manager to execute order forms, agreements, task orders, change orders, modifications, and amendments, provided that the cost is not to exceed the figures listed in the fiscal impact of this report; and (3) authorize the County Manager to establish the necessary budget to implement this SaaS upgrade and implementation.

Summary Explanation and Background:

The County has utilized Accela Civic Platform since 2006, when it was competitively procured via Proposal #P-4-06-02. This software effectively serves as the backbone of the County's permitting and development application processes and is the direct entry point for most applications by the public and contractors (via BASS), in addition to routing applications by type to the appropriate agencies and individuals for review. The County utilizes Accela software systems for the review, approval, & inspection of all development applications (including subdivisions, site plans, building permits, fire permits, and right-of-way permits). The system also automates the contractor licensing process & the enforcement of unlicensed contractors. In addition, the County uses the software to administer the processing of code enforcement investigations. Moreover, the software functions as a records repository, with real-time public access via BASS.

The breadth of information that is stored in Brevard County's Accela database is immense. There are more

than 421,000 records, with over 2.1 million documents attached to them. Meanwhile, the public has utilized its permitting features in droves; there are now more than 19,000 registered user accounts on BASS. Those user accounts are associated with about 94 new records generated every day, as well as 164 scheduled building inspections per day, and payment transactions of about $142k per day.

In 2016, the Board approved a contract with Accela for software optimization in order to implement new features and technology. On May 3, 2022, the Board approved RFP 3-23-03 to competitively procure a consultant to migrate the County's Accela implementation (version 9) to a newer version, 23, in addition to related work. On August 21, 2023, this contract was awarded to TruePoint Solutions, and this work remains ongoing. This effort is not duplicative of what is being requested; this upgrade allows the County to be in a better position to migrate to a software as a service (SaaS) implementation.

Accela has notified Brevard County they are ending support for all on-premise implementations of its Accela Civic Platform on December 31, 2025. Going forward, Accela will only be supporting SaaS users (i.e., its cloud-based platform). Staff recommends moving forward with this next step of modernization. Since its adoption in 2006, Brevard County staff has deeply embedded this software into many of its practices and has developed significant expertise in managing and utilizing the software's features. For example, the software is partially responsible for allowing staff to be far more efficient in processing permit applications. More than twice the number of permit applications are processed per Planning and Development employee now compared to when the software was implemented. While the software is not flawless, staff's experience with the software is largely positive and therefore staff recommends continuing to utilize Accela.

In order to continue the trend of increasing efficiency, staff also recommends including, as part of the scope of services, streamlining implementation to utilize recommended best-practices to the greatest extent possible. This streamlining would ensure the ability to take advantage of current and future features such as an AI component that is currently in development. Accela recently completed a similar project with the City of Tampa, implementing what they consider an "on-rails" configuration. While there is a significant cost and effort associated with a project such as this, the work would have considerable impacts for many years to come.

As owner and manufacturer of the Accela Civic Platform and related software and services, Accela is the sole provider of technical support and maintenance for the software. No third-party entity is authorized to develop new features for, provide development services for, or maintain their products and services.

Accela has provided not-to-exceed costs for this project based on numerous assumptions. As part of negotiations, staff intends to trim aspects of the scope of services to reduce costs. If approved, staff would enter into negotiations with Accela after they have had the opportunity to thoroughly review the County's current configuration. If an agreement can be reached with a scope of services encompassing the County's goals, the County Manager would be authorized to execute a contract with a value not to exceed the figures herein, and would be further authorized to execute amendments, change orders, and task orders to effectuate the project. Should the requested action be approved, Planning and Development has sufficient funding to absorb the costs without requiring additional revenue streams or a reduction in services.

Clerk to the Board Instructions:

Please send a copy of the Board action memo to Planning and Development and Central Services

BREVARD COUNTY BOARD OF COUNTY COMMISSIONERS

INSURANCE REQUIREMENTS

INSURANCE REQUIREMENTS

The Contractor providing services under this Contract will be required to procure and maintain, at their own expense and without cost to the County, until final acceptance by the County of all products or services covered by the purchase order or contract, the following types of insurance. The policy limits required are to be considered minimum amounts:

General Liability Insurance policy with a $1,000,000 combined single limit for each occurrence to include the following coverage: Operations, Products and Completed Operations, Personal Injury, and Errors & Omissions.

Auto Liability Insurance which includes coverage for all owned, non-owned and rented vehicles (as applicable) with a $1,000,000 combined single limit for each occurrence. Note: *This may not apply for this type of contract.*

Workers' Compensation and Employers Liability Insurance Workers Compensation insurance providing statutory benefits as required in the State of Florida. The Contractor shall require any subcontractor to provide evidence of this coverage (as applicable). Additionally, if the contract requires working on or around a navigable waterway, the Contractor and all subcontractors shall provide evidence of United States Longshoremen's and Harbor Workers (USL&H) coverage and contingent coverage of Jones Act (Marine Employers Liability) in compliance with Federal statutes or proof of exemption. The Contractor shall be responsible for compliance with these requirements by each subcontractor or supplier when applicable.

Professional & Cyber Liability The event that the contract involves professional or consulting services, in addition to the aforementioned insurance requirements, the Contractor shall also be protected by a Professional Liability Insurance Policy in the amount of $2,000,000 per claim and $2,000,000 aggregate. Policy must also include, at a minimum, coverage for privacy exposure liability, privacy regulatory defense and penalties, network security liability, media and intellectual property liability, notification and credit monitoring expenses, crisis management costs, computer forensics services, and network interruption and recovery. If policy is written as claims made, coverage shall remain continuous three years post term of the contract.

The Contractor shall have ten (10) days to provide certificates of insurance to the County demonstrating that the aforementioned insurance requirements have been met prior to the commencement of work under this contract. **The certificate(s) of insurance (COI) shall indicate that the General Liability and Auto Liability policies have been endorsed to cover the County as an additional insured (a waiver of subrogation in lieu of additional insured status on the workers compensation policy is acceptable).**

The insurance coverage enumerated above constitutes the minimum requirements and shall in no way lessen or limit the liability of the Contractor under the terms of the contract. Subcontractor's insurance shall be the responsibility of the Contractor.

Accela

Statement of Work

Brevard County, FL

12/31/2024

Version 1.3

Accela, Inc.
2633 Camino Ramon
Suite 120
San Ramon, CA 94583
Tel: 925-659-3200

Proprietary and Confidential

Accela

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DOCUMENT CONTROL

Date	Author	Version	Change Reference
8/15/2024	E Strang	1.0	SOW Creation
9/27/2024	E Strang	1.1	Add the Oracle Conversion into the scope
11/19/2024	E Strang	1.2	1. Modified the Project Delay language 2. Added the clause regarding Florida electronic record keeping clause 3. Changes references from xAPO to APO Sync process
12/02/2024	E Strang	1.3	Accepted Brevard's updates to the record types to include the Temporary Certificate of Occupancy as well as changing the Crystal Reports to SSRS. The SOW expiration was also updated to 12/31/2024

INTRODUCTION

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

This SOW and the OpenCounter Package SaaS for Modernization ("OpenCounter") is issued pursuant to and governed by the terms and conditions of the Subscription Services Agreement signed by and between the parties (the "Agreement").

Notwithstanding anything to the contrary, as a recent acquisition, OpenCounter has not been included in Accela's SOCII current audit reports however Accela has implemented substantially similar controls governing OpenCounter.

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

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

EXECUTIVE SUMMARY

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

The system review for Brevard County was conducted in April 2023, with the following objectives.

1. To evaluate the current state of the County's configuration.
2. To determine if process improvements and/or newer functionality could be implemented to maximize efficiency.
3. To understand daily issues faced by County staff and citizens while using the Accela Civic Platform.
4. To determine if moving to Accela SaaS is the correct approach for the County.

The entire assessment consisted of two phases. In phase one, 11 interview sessions, spanning two days, were conducted with the County's Accela Support and business users. In phase two, Accela reviewed the configuration associated with the 289 record types.

After performing the system review, the following are our findings:

1. Best practices and standardization can be applied to significantly improve user experience and streamline processes across the entire Accela Civic Platform.
2. Out of the box functionality is not fully utilized.
3. Moving to Accela SaaS would greatly benefit the County.

SOLUTION OVERVIEW

Your solution includes the following SaaS products:

- Civic Applications
  - Building
  - Planning
  - Business Licensing
  - Custom
- Accela Citizen Access (ACA) Public Portal with OpenCounter
- Accela Mobile
- Accela Insights
- Accela Ad How Report Writer
- Enhanced Reporting Database
- Accela GIS
  - APO Sync Process
- Construct API

RECORD TYPES AND COMPONENTS

The main area where best practices and standardization can be applied is related to record types and the components which make up these record types. Components include, Intake Forms, Workflows, Custom Field Groups, Fee Schedules, Inspection Groups, Status Groups, Document Groups and Pageflows. The following is a breakdown of the record count for each module and potential future count, based on Accela's consolidation best practices.

Module	Current Record Count (Solutions)	Future Record Count (Solutions)
Building	95	40
Development	39	18
Enforce	9	4
Utilities	1	1
Licenses	146	2

AUTOMATION

Upgrade the current Accela Scripting from 2.0 to version 3.0. This will allow for Accela's JSON configurable scripts. Configurable scripts are automation that have already been developed with defined functionality, which include, workflow updates, adding fees, adding/scheduling inspections, issuing/renewing licenses, emailing contacts and much more.

ADDRESS ASSIGNMENT AND CREATION

Configure the APO Sync process

Full details in Appendix G. These recommendations will be topics covered during the tailoring sessions.

PROJECT METHODOLOGY

Accela's Professional Services team will apply Accela's standard methodology throughout the life of the Agency's implementation. This is a proven methodology that ensures quality results and positions the Agency for success.

Accela and Agency will prepare a joint project plan and Accela will provide a project manager and key resources to complete implementation tasks alongside the Agency team. This service is delivered over 1 release with each release being broken down into four stages (Define, Refine, Develop and Deploy) resulting in the Agency's production use of the solution.

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

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

Stage Title	Stage Overview	Activities and Artifacts
Stage 1: Define	The Define stage sets the framework for how the project will be managed throughout the project life cycle.	• Project Schedule • Project Management Plan • Project Kickoff • SaaS Migration
Stage 2: Refine	The Refine stage begins the knowledge transfer of the Agency's Accela Civic Platform solution and promotes adoption of the new system. This stage completes the Agency-specific tailoring of the configuration.	• Core Team Training • Tailoring Sessions • Review and Verification testing • Conference Room Checkpoints • Batch Address Process Design
Stage 3: Develop	The Develop stage builds upon the tailored solution from the Refine Stage adding automation, custom reports, and integrations. The result of this stage is a fully built solution ready for deployment.	• Business Automation Configuration • Custom Report development • Batch Address process development • Review and Verification testing • Conference Room Checkpoints
Stage 4: Deploy	After all development work has been completed, the system is ready for User Acceptance Testing (UAT) and End User Training. Cutover activities, Go-Live and support to complete the project.	• Training Plan • Test Plan and Test Cases • User Acceptance Testing • End User Training • Go Live Support and Transition to Accela Customer Support

GOVERNING PRINCIPLES

For Accela and the Agency to successfully perform the onboarding described herein, there are several critical success factors that must be closely monitored and managed by the Accela and Agency stakeholders. These factors are critical in setting expectations between the Agency and Accela, identifying and monitoring risks, and promoting strong communication:

- **Clear Business Objectives** – The Customer has clearly documented their business objectives before the commencement of onboarding and shared those objectives with Accela.
- **Accept Civic Application Solution(s)** – The Customer acknowledges that a standard Civic Application package solution will provide end-to-end processing of an application or permit solution and may require some modifications to how the Customer conducts business today. Customer staff supporting the tailoring sessions should have an open mind to accept these standard solutions based on Accela's many years of applying best practices to the implementation process. These solutions will allow for online processing, attaching documents, processing the application via a workflow, sending notifications based on workflow status, accepting payment, allowing to capture standard comments, and if required trigger inspections. The solutions will allow the Customer to process their applications and/or permits.
- **Agency-specific Tailoring Inputs Identified and Documented** – The Customer has documented and has a clear understanding of their processes to enable the Accela team to perform solution tailoring. For example, the Customer must have a clear understanding on how fees are calculated to support the solution. If there is an expectation that the Customer's business processes expand the scope of the solution, Accela will raise this risk to the Customer prior to proceeding.
- **Dedicated Agency Participation** – Agency acknowledges and agrees, throughout the duration of the Professional Services, to have (i) its staff and/or agents Agency personnel actively involved in the Project, and (ii) its software, hardware and other technology performing (or available for performance), each as specified in the agreed upon Project Plan (such Agency personnel and technology, collectively the Agency resources). Accela will communicate insufficient participation of Agency resources through Project Status Reports and will indicate actual and potential impacts to the Project Timeline. Accela will work the Agency's Executive Sponsors and department leaders to determine appropriate team member involvement. This could range from full-time, during early analysis meetings, to part-time during the technical development phase. Please see Appendix E for a full description of Agency resources.
- **Executive Sponsorship, Governance, and Change Control** – The initiative is supported by executive sponsors within the Agency who will drive the Agency staff participants towards overarching goals and standardization/adoption of the Civic Application Solution. The executives will remove roadblocks, quickly make decisions, support risk mitigation, and resolve escalated issues. Effective governance during the onboarding period and a tight change control processes for the subscribed solution requires alignment across Agency stakeholders. Throughout the project, the teams will encounter issues and decisions that require engagement of the joint Agency/Accela governance team. Invariably, changes to the identified solution will arise and the governance process must resolve these issues with urgency in order to avoid impacts to the schedule and scope.
- **Accela Standard Implementation Methodology** – Agency acknowledges that it is willing to adhere to and will adopt Accela's implementation methodology. Please see Appendix D for a full description of the Accela implementation methodology.

- **Knowledge Transfer** – Agency personnel must participate in all the implementation stages and activities for Accela to transfer knowledge to the Agency. Once Post-Production transition tasks are completed by Accela, Agency personnel will assume all day-to-day business operation of the solution.

ADMINISTRATION

PROJECT TIMELINE

The project is estimated to take **22 months**. The projected start date for the Project is forty-five (45) calendar days after mutual acceptance and signature of this SOW. A detailed schedule will be developed during the Define stage in collaboration with Accela and Agency Project Manager. If Agency determines they cannot meet the timeframes estimated in this SOW, this will be escalated at the start of the project as discussion for Change Order.

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

The table below shows an estimated high-level timeline.

Month 1 – 9	Define Stage - SaaS Migration
Months 10 – 16	Refine Stage
Months 11 – 19	Develop Stage
Months 20 - 22	Deploy Stage - Month 22 is Post-Production Support

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

PROJECTS PUT ON HOLD AND AGENCY DELAYS

It is understood that sometimes Agency priorities are revised requiring the Agency to place the Accela implementation on hold. The Agency must send a formal written request to Accela to put the project on hold. Delays of a complete project stoppage lasting two (2) weeks or more that have a tangible impact to Accela's resource plan will follow the Change Order process in the Project Management Plan. Change Orders are used to track changes to the implementation that could be to timeline, resources, scope, or costs.

If an Agency-based delay puts the project on hold for more than 90 days, Accela reserves the right to terminate the SOW and negotiate new terms. If an Agency-based delay puts the project on hold past the termination period, Accela reserves the right to terminate the SOW at the time of the delay. After that time, Accela can choose to cancel the rest of the SOW. To finish the project will require a new SOW at new pricing at the standard rates.

When a Project is put on hold, at minimum, Accela will need to draft a Change Order to keep some of the Accela project manager's time engaged to monitor progress and to resource the project once it comes off hold. Other Change Order items may be needed as a result of the delay. When a project goes on hold, project resources will be re-deployed and Accela will need a forty-five (45) calendar day notice to re-staff the project. Accela cannot guarantee a Project Start Date until Accela resources are confirmed.

Should the Agency become non-responsive to Accela communications for a term of 30 calendar days regarding continuance of the project work, Accela can choose to cancel the remainder of the SOW. To finish the project will require a new SOW at new pricing at the standard rates.

PAYMENT TERMS

Accela will perform the Professional Services on a Billing Milestone payment basis. Payments will be based on: (i) the nature and scope of the Professional Services and associated Billing Milestones outlined, (ii) the expected staffing requirements, (iii) the Project Schedule, (iv) Accela's and Customer's roles and responsibilities, and (v) the other assumptions as set forth in this SOW. The Fixed-Fee price is based on the information available at the time of signing and the assumptions, dependencies and constraints, and roles and responsibilities of the Parties, as stated in this SOW. After the Agency signs the Deliverable Acceptance Form, Accela will generate an invoice for the corresponding Deliverable payment.

For those deliverables denoted with an asterisk in the table below, please refer to these Deliverable-based Assumptions:

- Deliverables will be documented in Accela-based templates using the Accela methodology. There is no stated or implied promise that deliverables will be of a specified page length or comply to Agency formatting requirements. Sample templates are available to Agency upon request.
- Initial Review: For deliverables turned over to the Agency, Agency will have 5 business days to conduct review (or testing) of the deliverable. Upon delivery of feedback, Accela will complete the agreed upon updates. If no comments are provided at the end of the 5-day period, the deliverable will be submitted for final review and acceptance.
- Final Review and Acceptance: Upon completing any updates following the initial review period, Accela will deliver the final deliverable to the Agency for acceptance. Accela will provide the Agency with the Accela Deliverable Acceptance Form to formalize acceptance and completion of that piece of scope. The criteria outlined in the Professional Services for the corresponding deliverable will be deemed accepted based on the acceptance criteria herein. The Deliverable Acceptance Form is subsequently signed by the appropriate Agency contact, as defined in the Project Management Plan, and delivered to Accela. The Agency has 5 business days to perform a final review (or test) on the deliverable and to sign off on the Deliverable Acceptance form. If no comments are provided at the end of the 5-day period, the deliverable is deemed approved.
- Agency agrees to assign a single designated approver for each project deliverable. The designated approver will be responsible for overseeing and/or directly participating in the design and development, as well as the approval, of the deliverable. Agency may make changes to designated approvers with written notification to Accela a minimum of one month before a deliverable is due.

For those without an asterisk, sign-off must be completed within 5 business days of delivering the acceptance form.

The following lists each deliverable associated with a payment, and its criteria for acceptance. The details for each deliverable, including Accela and Agency responsibilities, can be found in Appendix D (Accela Methodology).

Stage Title	Deliverable	Acceptance Criteria	Deliverable Amount
OpenCounter Package SaaS for Modernization	OpenCounter Package SaaS from 12/31/2024 to 12/31/2029	• Proof of Delivery of OpenCounter Package SaaS	$414,422.35
Stage 1: Define	Project Startup	• Delivery of the baseline project schedule reflecting Agency and Accela inputs* • Delivery of the Project Management Plan reflecting Agency and Accela inputs* • Delivery of Project Kickoff presentation and completion of meeting	$74,936.67
	Solution Provisioning	• Delivery of the Accela Civic Platform software and confirmation of Agency's ability to log in	$74,936.67
	Migrate Test Interfaces	• Delivery of interfaces in the Accela Cloud Environment	$74,936.67
	Convert Reports	• Delivery of SSRSand Ad Hoc Reports	$74,936.67
	Migration Testing	• Support for Regression Testing • Resolution of agreed upon punch-list defects related to the migration	$74,936.67
	SaaS Go-Live Cutover	• Production system is available for daily use by the Agency	$74,936.67
Stage 2: Refine	Tailoring Sessions for Groups 1 and 2	• Complete Tailoring Sessions for Group 1 and 2	$74,936.67
	Tailoring Sessions for Groups 3 and 4	• Complete Tailoring Sessions for Group 3 and 4	$74,936.67
	Tailoring Sessions for Groups 5 and 6	• Complete Tailoring Sessions for Group S and 6	$74,936.67
	Tailoring Sessions for Groups 7 and 8	• Complete Tailoring Sessions for Group 7 and 8	$74,936.67
	Refine Stage Conference Room Checkpoints for Groups 1 and 2	• Delivery of Configuration Report for each record type, serving as a snapshot of the tailored configuration • Complete Conference Room Checkpoint	$74,936.67

Stage Title	Deliverable	Acceptance Criteria	Deliverable Amount
	Refine Stage Conference Room Checkpoints for Groups 3 and 4	• Delivery of Configuration Report for each record type, serving as a snapshot of the tailored configuration • Complete Conference Room Checkpoint	$74,936.67
	Refine Stage Conference Room Checkpoints for Groups 5 and 6	• Delivery of Configuration Report for each record type, serving as a snapshot of the tailored configuration • Complete Conference Room Checkpoint	$74,936.67
	Refine 5tage Conference Room Checkpoints for Groups 7 and 8	• Delivery of Configuration Report for each record type, serving as a snapshot of the tailored configuration • Complete Conference Room Checkpoint	$74,936.67
	OpenCounter – Onboarding, Design, and Configuration	• Delivery of OpenCounter configuration	$74,936.67
Stage 3: Develop	OpenCounter Testing and Validation	• Remediation of items reported in the Testing and Validation section	$74,936.67
	Develop Stage Conference Room Checkpoints for Group 1	• Conduct Conference Room Checkpoint demonstrating the final configured solution, business automation, and report.	$74,936.67
	Develop Stage Conference Room Checkpoints for Group 2	• Conduct Conference Room Checkpoint demonstrating the final configured solution, business automation, and report.	$74,936.67
	Develop Stage Conference Room Checkpoints for Group 3	• Conduct Conference Room Checkpoint demonstrating the final configured solution, business automation, and reports.	$74,936.67
	Develop Stage Conference Room Checkpoints for Group 4	• Conduct Conference Room Checkpoint demonstrating the final configured solution, business automation, and reports.	$74,936.67
	Develop Stage Conference Room Checkpoints for Group 5	• Conduct Conference Room Checkpoint demonstrating the final configured solution, business automation, and reports.	$74,936.67

Stage Title	Deliverable	Acceptance Criteria	Deliverable Amount
	Develop Stage Conference Room Checkpoints for Group 6	• Conduct Conference Room Checkpoint demonstrating the final configured solution, business automation, and reports.	$74,936.67
	Develop Stage Conference Room Checkpoints for Group 7	• Conduct Conference Room Checkpoint demonstrating the final configured solution, business automation, and reports.	$74,936.67
	Develop Stage Conference Room Checkpoints for Group 8	• Conduct Conference Room Checkpoint demonstrating the final configured solution, business automation, and reports.	$74,936.67
Stage 4: Deploy	Testing Plan*	• Delivery of the Testing Plan reflecting Agency and Accela inputs	$74,936.67
	Training Plan*	• Delivery of the Training Plan reflecting Agency and Accela inputs	$74,936.67
	UAT – Remediation and Remediation Testing Support	• Support for Remediation and Remediation Testing period • Resolution of critical and high punch list defects related to configuration or Accela custom development (sign-off is not dependent on resolution of product defects)	$74,936.67
	End-User Train the Trainer	• Delivery of End User Train the Trainer	$74,936.67
	Production Go Live	• Production system is available for daily use by the Agency	$74,936.67
	Transition to Customer Support	• Execution of post-go live support, per Appendix B scope • Official transfer from the Accela Professional Services project team to Accela Customer Support (sign-off is not dependent on resolution of defects that are transitioned to Customer Support)	$74,936.67
TOTAL DELIVERABLES COST			**$2,662,522.45**

Payments are due net 40 of the invoice date.

EXPENSES

The overall fee listed in the Payment Terms section is inclusive of expenses. The Agency will not be billed for travel expenses or travel time. The Agency will not receive expense reports or receipts.

Accela will provide up to a total of **twenty (20) weeks** of onsite Professional Services. A "Week" is defined as one (1) person, for four (4) days or 32 hours, Monday through Friday, allowing for travel time on Monday

morning and Friday afternoon. Accela may assign more than one person per Week. For purposes of clarification only, if Accela assigns one person for one Week, this assignment will count as one (1) onsite Professional Services Week, if Accela assigns two (2) people simultaneously for a one (1) Week onsite assignment, this assignment will count as two (2) Weeks of onsite Professional Services. Should the customer require more onsite trips, a Change Order will be required prior to additional travel commencing to cover the cost of those additional trips.

CONTRACT SUM

The total amount payable under this SOW, is **$2,662,522.45**, including expenses.

The estimated fees for this SOW are predicated on the timely completion of Project milestones. However, should completion of milestones slip due to actions or inactions of Agency, and should this slippage result in material effort to Accela in excess of the hours provided for in this document, Accela will produce a Change Order for additional hours in support of the scope and deliverables contained herein. Any Change Order will need to be approved in writing by both Agency and Accela. Change Orders will need to be approved within three (3) business days of delivery to avoid a halt of work on the Project.

CHANGE ORDERS

In order to make a change to the scope of the Professional Services in this SOW, and subject to the Disclaimers below, Agency must submit a written request to Accela specifying the proposed changes in detail. Accela will submit to Agency an estimate of the charges and the anticipated changes in the delivery schedule that will result from the proposed change in the Change Order, based on the standard rate for Accela resources of $210 per hour. Accela will continue performing the Professional Services in accordance with the SOW until the parties agree in writing on the change in scope of work, scheduling, and fees. If Accela's effort changes, such as changes to the baseline schedule, roles, responsibilities, assumptions, or scope, or if additional support hours are required, a Change Order will be created that details these changes and impact to project and cost (if any). Any Change Order must be agreed to by Accela and Agency prior to commencing any activities defined in the Change Order.

EXPIRATION

The scope and terms of this SOW must be executed by 12/31/2024. If the SOW is not executed within that timeframe, the current scope and terms can be renegotiated.

DISCLAIMERS

Accela makes no warranties in respect of its Professional Services described in this SOW except as set out in the Agreement. Any configuration of or modification to the Product that can be consistently supported by Accela via APIs, does not require direct database changes and is capable of being tested and maintained by Accela will be considered a "Supported Modification". Accela's obligations and warranties in respect of its Professional Services, Products, and maintenance and support, as set out the agreement between Accela and Agency, does not extend outside the Supported Modifications or to any Agency manipulation of implemented scripts, reports, integrations and adaptors.

In the event Agency requires significant work beyond the scope of the included configuration and onboarding services, Accela may request that Agency separately engages Accela's Professional Services

organization to complete the out-of-scope services. In such instance, a separate proposal and statement of work for the additional services will be drawn up and agreed in writing between the parties.

ASSUMPTIONS

GENERAL SCOPE ASSUMPTIONS

- Any coding or integrations not specifically described in this document are not in scope.
- Development of test cases are not in scope of Accela Professional Services.
- Development of custom training materials are not in scope of Accela Professional Services.
- Scope of the Project is based on discovery sessions with Agency prior to the SOW development.
- Any additional worked hours over the hours or scope stated in the SOW will require a Change Order.
- Pre-existing defects will not be in this scope unless specifically identified.
- Brevard County intends to utilize Accela SaaS as an electronic record keeping system for Brevard County records, and such records will be subject to meeting Florida Law including, but not limited to, Section 119.01, Florida Statutes.

PROJECT RESOURCING ASSUMPTIONS

- Resources expected by the Agency and Accela are listed in Appendix E.
- Accela personnel will attend Agency executive steering committee meetings, either in-person or remotely.
- In the pricing, Accela has assumed the appropriate resourcing to ensure success for the scope outlined. Additional support requested by Agency over this level of resourcing would necessitate a Change Order that could impact the cost of the project.
- Accela personnel will not be required to provide Professional Services on-site if doing so would put Accela personnel at actual or potential risk, as determined at Accela's sole discretion.
- Accela is not responsible for impacts to project timeline created by dependency on Agency third party consultants. Timeline changes will result in a Change Order for extension of Accela project resources caused by Agency third party consultant actions (including availability) resulting in additional time or scope.
- When the project team works onsite at an Agency facility, suitable workspace will be provided and equipped with appropriately functional and network access to and connectivity with all systems, networks, and data as necessary to perform the project. Agency will also provide necessary security badges, parking passes as required.

ACCELA TECHNICAL ASSUMPTIONS

- Agency will ensure that Accela resources have access to a Dev or Test version of the 3rd party system for integration development. All integrations will be developed against one (1) agreed upon version of the 3rd party system. Additionally, Agency will ensure Accela resources have access to a Production environment of the 3rd party system.
- Technical Specification documents will not be produced for any standard integrations, such as GIS, Single Sign-On (SSO), and standard payment adapters. Agency will select/purchase/acquire the appropriate third-party software prior to the Project Start Date. In the event third party software is not available and provisioned by Project Start Date, a Change Order may be needed to cover delays in project work.

- Agency is responsible for providing all third-party end user training and third-party training for Accela staff.
- Accela will host the source code repository which is integrated with the Accela Civic Platform. If the customer has an existing code repository, the Accela repository will be the master (source of truth) until project completion.
- Agency must provide a Contact for all third-party systems, to be available for collaboration.
- Agency must have sufficient licenses in place to allow a minimum of one (1) Accela installation.
- Agency is responsible for hosting any integrations.
- Agency is responsible for obtaining a code source repository prior to go-live, to maintain custom scripting code.
- Only Professional Services associated with Accela Civic Platform are included in this SOW. Any other services should be contracted directly through them or their affiliates. Accela PM will work closely with the software provider PM to align and coordinate on schedule and deliverables.

Accela

SIGNATURES

This SOW is agreed to by the parties and made effective upon the date of last signature. If undated by Agency, the effective date will be as of the Accela signature hereto.

ACCELA, INC.

Signed by:
Michael E Gigliello
73609EEF6B274C8...
Authorized Signature

Michael E Gigliello
Name – Type or Print

Controller
Title

12/31/2024
Date

Brevard County, FL

Authorized Signature

Name – Type or Print

Title

12/31/24
Date

APPENDIX A: SOLUTION INVENTORY

This appendix lists the subscribed Solution Inventory. This inventory has been created based on consultation with the Agency. For solutions where there is a pre-built Accela Civic Application, solution type is denoted with the name of the Civic Application. Where there are multiple names of the same Civic Application name, those records will be consolidated. This list represents all record types that are in scope for the implementation.

Module	Current Record Count (Solutions)	Future Record Count (Solutions)
Building	95	40
Development	39	18
Enforce	9	4
Utilities	1	1
Licenses	146	2

Below is the list of current record types with the Civic Application mapping.

Module	Record Alias	Civic Application
Building	**Temporary Certificate of Occupancy**	**Custom**
Building	Commercial Addition-Alteration Miscellaneous	Commercial Addition Permit
Building	Commercial Addition-Alteration Multifamily Residential	Commercial Addition Permit
Building	Commercial Addition-Alteration Other Non-Residential Building	Commercial Addition Permit
Building	Commercial Addition-Alteration Structures Other Than Buildings	Commercial Addition Permit
Building	COM Addition Alteration	Commercial Addition Permit
Building	Commercial Demolition Misc.	Commercial Demolition Permit
Building	Commercial Demolition Other Non-Residential Building	Commercial Demolition Permit
Building	Commercial Demolition Structures Other Than Buildings	Commercial Demolition Permit
Building	COM Electrical	Commercial Electrical Permit
Building	County Alarm	Custom Fire Permit
Building	County Auto Extinguish	Custom Fire Permit
Building	City Alarm	Custom Fire Permit
Building	City Auto Extinguish	Custom Fire Permit
Building	City Building	Custom Fire Permit
Building	City Site	Custom Fire Permit
Building	City Sprinkler	Custom Fire Permit
Building	City Water Flow Test	Custom Fire Permit
Building	County Sprinkler	Custom Fire Permit

Building	County Water Flow Test	Custom Fire Permit
Building	COM HVAC-Mechanical	Commercial Mechanical Permit
Building	COM Marine Construction	Commercial New Construction Permit
Building	COM Minor Alteration	Commercial Alteration Permit
Building	Commercial Minor Electric	Commercial Electrical Permit
Building	Commercial Minor HVAC Mechanical	Commercial Mechanical Permit
Building	Commercial Minor Misc.	Commercial Addition Permit
Building	Commercial Minor Plumbing	Commercial Plumbing Permit
Building	Commercial Minor Re-roof	Commercial Roofing Permit
Building	Commercial Change of Occupancy Classification	Commercial Addition Permit
Building	Commercial Misc Exhaust Hood	Commercial Addition Permit
Building	Commercial Misc Alterations	Commercial Alteration Permit
Building	Commercial Misc Temporary Structure-Tents	Temporary Structure Permit
Building	COM Miscellaneous	Commercial Addition Permit
Building	COM New Construction	Commercial New Construction Permit
Building	Commercial New Foundation Only	Commercial New Construction Permit
Building	Commercial New Multifamily Residential	Commercial New Construction Permit
Building	Commercial New Other Non-Residential Building	Commercial New Construction Permit
Building	Commercial New Structures Other Than Buildings	Commercial Accessory Structure Permit
Building	COM Plumbing	Commercial Plumbing Permit
Building	COM Renovation	Commercial Alteration Permit
Building	COM Reroof	Commercial Roofing Permit
Building	COM Solar Photovoltaic	Commercial Solar/PV Permit
Building	COM Solar Thermal	Commercial Solar/PV Permit
Building	City Fire Permit	Custom Fire Permit
Building	Miscellaneous Bingo Licenses	Custom
Building	Miscellaneous Master Plans	Custom
Building	Miscellaneous Special Events Permit	Special Event Permit
Building	Residential Accessory Structure	Residential Accessory Structure Permit
Building	Residential Addition-Alteration Manufactured Home	Residential Addition Permit
Building	Residential Addition-Alteration Misc	Residential Addition Permit
Building	Residential Addition-Alteration Swimming Pool	Residential Pool/Spa Permit
Building	Residential Addition-Alteration Single Family Home	Residential Addition Permit
Building	Residential Addition Single Family Residence	Residential Addition Permit
Building	Residential Demolition Single Family Residence	Residential Demolition Permit
Building	Residential Demolition Mobile-Manufactured Home	Residential Demolition Permit
Building	Residential Demolition Misc.	Residential Demolition Permit

Building	RES Demolition	Residential Demolition Permit
Building	RES Doors-Windows-Shutters	Residential Alteration Permit
Building	RES Electrical	Residential Electrical Permit
Building	Residential HVAC	Residential Mechanical Permit
Building	Residential Misc.	Residential Mechanical Permit
Building	Residential Re-roof	Residential Roof Permit
Building	RES Fence	Fence Permit
Building	RES Generator	Residential Mechanical Permit
Building	RES HVAC-Mechanical	Residential Mechanical Permit
Building	RES Marine Construction	Residential New Construction Permit
Building	Residential Minor Electrical	Residential Electrical Permit
Building	Residential Minor HVAC	Residential Mechanical Permit
Building	Residential Minor Misc	Residential Addition Permit
Building	Residential Minor Plumbing	Residential Plumbing Permit
Building	RES Mobile Home	Mobile Home Permit
Building	Residential Mobile Home	Mobile Home Permit
Building	Multi-Family Addition	Residential Addition Permit
Building	RES Multi-Family Addition Alteration	Residential Addition Permit
Building	RES Multi-Family Minor Alteration	Residential Alteration Permit
Building	Multi-Family New	Residential New Construction Permit
Building	Multi-Family Renovation	Residential Alteration Permit
Building	Residential New Single Family Residence	Residential New Construction Permit
Building	Residential New Mobile-Manufactured Home	Residential New Construction Permit
Building	RES Plumbing	Residential Plumbing Permit
Building	RES Pool Resurface	Residential Pool/Spa Permit
Building	RES Pool	Residential Pool/Spa Permit
Building	RES Reroof	Residential Roof Permit
Building	RES SFR Addition Alteration	Residential Addition Permit
Building	RES SFR Addition	Residential Addition Permit
Building	RES SFR Aluminum Structure	Residential New Construction Permit
Building	Residential SFR Exterior Alteration	Residential Addition Permit
Building	Residential SFR Interior Alteration	Residential Alteration Permit
Building	RES SFR Minor Alteration	Residential Alteration Permit
Building	RES SFR Renovation	Residential Alteration Permit
Building	RES SFR-Duplex New	Residential New Construction Permit
Building	RES Solar Photovoltaic	Residential Solar/PV Permit
Building	RES Solar Thermal	Residential Solar/PV Permit
Building	Residential Solar	Residential Solar/PV Permit
Building	RES Tiny House on Wheels	Tiny House Permit

Development	Bond	Not a record type (due to merging)
Development	Engineering Revision	Not a record type (due to merging)
Development	Commercial Impact Fees	Not a record type (due to merging)
Development	Residential Impact Fees	Not a record type (due to merging)
Development	PZ Miscellaneous Fees	Not a record type (due to merging)
Development	ROW Final Inspection	Not a record type (due to merging)
Development	Right-of-Way	Street and Alley Closure
Development	Site Construction Permit	Site Plan Major
Development	Site Plan Final Inspection	Not a record type(due to merging)
Development	Site Plan Major	Site Plan Major
Development	Site Plan Minor	Site Plan Minor
Development	Site Plan Pre App	Pre-Applications Consultation
Development	Severance	Site Plan Major
Development	Subdivision Final Inspection	Not a record type (due to merging)
Development	Final Plat Subdivision	Subdivision - Final Plat
Development	Major Subdivision	Subdivision - Final Plat
Development	Minor Subdivision	Subdivision - Final Plat
Development	Unpaved Road	Street and Alley Closure
Development	Vested Rights	Special Use Permit
Development	Finish Floor Waiver	Special Use Permit
Development	General Waiver	Special Use Permit
Development	Administrative Approval	Administrative Deviations
Development	Alcohol Restaurant	Custom
Development	Amendment - Binding Development Plan	Amendment to Approved Plans
Development	Binding Development Plan (BDP)	General Plan Amendment
Development	Combined Rezoning-Conditional Use Permit	Conditional Use Authorization
Development	Concurrency	Custom
Development	Conditional Use Permit (CUP)	Conditional Use Authorization
Development	Development Feasibility	Custom
Development	Flag Lot or Easement	Lot Line Adjustment
Development	Comp Plan - Large Scale (LSCP)	Site Plan Major
Development	Zoning Miscellaneous	Special Use Permit
Development	Amendment - PUD Major	Planned Unit Development
Development	Amendment - PUD Minor	Planned Unit Development
Development	Rezoning	Rezoning
Development	Comp Plan - Small Scale (SSCP)	Site Plan Minor
Development	Variance	Zoning Variance
Development	Zoning Waiver	Special Use Permit
Development	Verification Letter	Zoning Verification

Enforce	Contractor Licensing Citation	License Violation
Enforce	Housing Code Complaint	Building Violation
Enforce	Code Enforcement Case	Building Violation
Enforce	Environmental Health Case	Environmental Health Violation
Enforce	Fire Case	Fire Violation
Enforce	Natural Resource Case	Environmental Health Violation
Enforce	Contractor Licensing Complaint	License Violation
Enforce	NA	License Violation
Enforce	Magistrate Audio	Not a record type (due to merging)
Utilities	Sewer Leak	Sewer Connection
Licenses	State Contractor [all categories]	Custom state license
Licenses	Reciprocity [all subtypes/ categories]	Not a record type (due to merging)
Licenses	Grandfathering Contractor [all subtypes/ categories]	Not a record type (due to merging)
Licenses	Exam [all subtypes/ categories]	Custom county license

APPENDIX B: TAILORING FRAMEWORK

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

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

RECORD GROUPINGS

The project assumes a total of 8 record groupings. Each record group will move through a tailoring process comprised of these high-level activities:

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

The project timeline assumes that the tailoring activities across groupings will be performed in parallel. For example, once the Tailoring Sessions are completed for Group 1, sessions can begin the following week for Group 2 while configuration activities proceed for Group 1.

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

TAILORING COMPONENTS

Record-level

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

setup, such as automating a fee calculation or automating the assessment of a fee (using scripting), is included in Appendix C - Automation.
    - **Document Types** -- Applicant, Licensed Professionals, Authorized Agent, and Agency Staff can upload documents associated to a permit application.
    - **ACA** – For each Civic Application record in the Solution Inventory, a pre-defined series of pages to submit the application online (i.e., the record's pageflow) is included. Each page in a pageflow can have its own instructional text.
- **Custom Records** – For the processes in Appendix A that are marked "Custom", Accela will clone an existing process where possible, and tailor the components above for each custom record. These updates must be completed and validated within the time-boxed tailoring process.

System-level

- **Standard Comments –** Standard Comments allow staff to select from a predefined list of comments during processing of applications, inspections, workflows and checklists, promoting consistency across the system.
- **Condition Management** – A condition is a requirement applied to a record, contact, address, or parcel that the applicant must fulfill to qualify for approval. Automating the assessment or satisfaction of a condition (using scripting), is included in Appendix C - Automation.
- **Inspection Configuration** – To support inspection processing, Accela will configure:
    - Inspection types associated to the records in the Solution Inventory
    - Checklists (specific items inspectors are looking at during the corresponding inspection type. This will be different for each inspection type) for use in the system
    - Associating the appropriate Accela users as inspectors in the system
    - Inspection districts (geographic areas in which inspectors are assigned to work) for use in the system
    - Inspection disciplines (area of expertise such as restaurants or high-rise buildings) for use in the system
    - Calendars (calendars used to determine when inspections can be done, the number of inspections done per day and who is available to perform inspections) to support the inspection process
    - Note: the Civic Platform inspection configuration is also used by the Citizen Access (public portal) for citizens to schedule inspections. Advanced inspection setup such as conditional inspection schedule is included in Appendix C – Automation.
- **User Groups** – Accela's Civic Applications are deployed with a pre-defined set of role-based user groups, such as Admin, Agency Admin, Daily, Inspector, Public User, and Read Only. Accela will provide new user groups across the project. Accela will also work with the Agency to indicate which permissions need to be updated, as needed, for each user group. Accela expects permission updates to each user group. For example, if the Agency wants the inspector role to collect fees and payments, this will be a permission update to allow additional access to the current role defined.
- **Amendment Record** – Each Civic Application Solution is configured with the amendments listed in Appendix A
- **Notifications** – Accela uses standard automation to notify applicants of common processes performed in the system. The Civic Applications are pre-built with standard notifications such as the following. Custom notifications, outside of those pre-built in the Civic Applications, are included in Appendix C - Automation.
    - Additional Information required for application

- Permit/License Issued
- Application Denied
- Inspection Scheduled
- Inspection Result

CITIZEN ACCESS CONFIGURATION

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

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

The following use cases are included in the subscribed solution:

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

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

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

STANDARD REPORT BRANDING

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

ACCELA DOCUMENT SERVICES

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

ACCELA MOBILE CONFIGURATION

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

ACCELA GIS CONFIGURATION

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

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

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

The following will be executed for this task:

- Configuration of map services within Accela GIS
- Configure the APO sync process
- Setup of 2 Proximity Alerts (EMSE script)
- Setup of 5 Attribute Mappings to Record Custom Fields

USER ACCEPTANCE TESTING (UAT)

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

Initial Testing	3 weeks
Remediation	1 weeks
Remediation Testing	2 weeks
Total User Testing Duration	**6 weeks**

Additional details may be found under the User Acceptance Testing section of Appendix D: Accela Methodology.

POST GO-LIVE SUPPORT

Accela will provide **four (4) weeks** of post-production support to the Agency before transitioning support to Accela Customer Support. Additional details may be found under the Post Go Live Support and Transition to Customer Support section of Appendix D: Accela Methodology.

TRAINING COURSES

Accela will provide the following standard training courses for the project. All training courses have a maximum of 15 participants.

Training	Description
GIS Administration Provided by Accela University (public)	This course is designed to prepare agency administrators to configure and maintain Accela JavaScript GIS maps in the Civic Platform and Citizen Access. You will learn to use the GIS Admin tool for setup and connection to your existing map service. You will be able to build map profiles consisting of map services, geocoding, routing, and custom base maps. You will learn to create AA and ACA integrations and customize your map users experience with map groups. You will be able to setup and configure optional items such as Dynamic Themes, Custom Widgets, and Hotlinks.
Ad Hoc Reports Provided by Accela University (public)	This course is designed to prepare agency report writers with the skills and knowledge to use the Ad Hoc tool to prepare, manage and deploy low to medium level reports. Learn how to use report tools to design and develop reports and create sub-reports. Learn to deploy reports in hundreds of places throughout the Civic Platform and ACA. Practice creating expressions to concatenate or calculate at the field level. Discover how to use the form designer to create forms and letters.
SSRS Reports Provided by Accela University (public)	Participants will receive instruction in designing reports, connecting to custom data, creating custom formulas, and accepting user input through parameters. Additionally, participants will receive instruction in creating reports to show workflow, workflow history, associated people, and related record information. Finally, the training will conclude with instruction in the creation of a report showing the results of an inspection. The report will show details of inspection results, guide-sheet, and guide-sheet items associated with the inspection.
Train - the – Trainer Delivered by Professional Services	This course is designed to certify agency trainers/super-users knowledge and understanding of their unique instance of the Civic Platform and associated components. Course places special emphasis on the following areas: Civic Platform and Citizen Access overview, user groups and hierarchies, data types and search, task assignments and filters, records, record functionality, fees and payments, processing records, working with inspections, Accela maps/GIS, Citizen Access, End-user training resources available in Accela University. Course experience will include demonstration using select agency records, hands-on exercises and participant testing. Course experience is designed to be completed within 24 hours of instruction but can be extended upon request or in special circumstances where additional record types with special complexity may require additional hours of instruction. Introductory Civic Platform courses that teach Accela functionality (not agency-specific) are available to all agency end-users for free on the University.

APPENDIX C: CUSTOMIZATION

AUTOMATION

During the Tailoring process, Accela and the Agency will identify opportunities to supplement the Accela Civic Platform base functionality via scripting to validate and automate business processes.

Automation is time boxed at **(1,200) hours.** These hours include time for initial automation estimation, analysis, design specifications, development, unit testing and QA. The team will document the process for managing to the time budget in the Project Management Plan.

Below provides the different complexity types and an average of how many hours each takes.

- Very High Complexity – Exports, imports, complex batches. Average 60+ hours.
- High Complexity – batch scripts (e.g., license expiration notice), page flow scripts. Average 40 hours.
- Medium Complexity – event scripts (e.g., auto-assign inspections, populating custom fields from GIS, placing a condition on a record based on custom fields and/or GIS data elements), pre- and post-scripts, and scripting expressions (non-wizard based). Average 16 hours.
- Low Complexity – configurable scripts, wizard-based expressions. Average 4 hours.

CUSTOM REPORTS

Report Writing is time boxed at **(200) hours.** These hours include time for initial report list estimation, analysis, design specifications, development, unit testing and QA. The team will document the process for managing the time budget in the Project Management Plan.

Below provides the different report complexity types and an average of how many hours each takes.

- Very High Complexity Report - Reports that may include the following: multiple layouts, large number of fields, multiple headers, footers and page breaks. Average 70 hours.
- High Complexity Report - Reports that require complex queries, joins, multiple sources, etc. Examples include statistical and analytical reports, schedules, and agendas. Average 50 hours.
- Medium Complexity Reports - Reports that require some calculations and summaries. Examples include forms and transaction reports (receipts, permits, inspection tickets, journals, logs). Many agency reports fall under this category. Average 40 hours.
- Low Complexity Reports - Reports that require a simple pull from a limited number of database fields and presentation on a document. Examples include letters such as Certificates of Occupancy, notices, and mailing labels. Average 32 hours.

INTEGRATIONS

Accela is going to leverage all of the existing integrations once migrated to the cloud.

DATA CONVERSION

There are no external data sources in scope for this project.

APPENDIX D: ACCELA METHODOLOGY

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

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

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

DEFINE

The Define Stage sets the plan and foundation for the Agency's Accela Civic Platform implementation. The stage will be initiated once the parties execute all contract documents. This stage defines how the project will be managed throughout its lifecycle. Accela will provide Agency with a Project Management Plan which documents key disciplines, processes, and standards for how the project will be managed from roles and responsibilities to risk management. Accela and Agency will collaborate on a Project Schedule to define the tasks with durations and resource assignments. Accela will provide a SharePoint site as the primary repository for tracking all project related documentation, issues and risks. Accela will provision the Agency's non-production environments and install the subscribed Civic Application Solution.

PROJECT INITIATION

Prior to the formal project kickoff, a series of pre-kickoff activities will occur. The Accela and Agency Project Managers, along with key staff, will meet to confirm alignment between the parties prior to starting the process. Meetings will include a review of the overall approach and methodology, discussion of expectations, and commencing the detailed planning activities.

Accela will review with Agency the subscribed solution inventory through a facilitated orientation workshop. The Solution Inventory illustrates the Agency's subscribed Civic Application solution by mapping the Agency's record types to Accela Civic Application features. Accela will further categorize the record types into logical groups (Solution Groups) based on similar functions. The Solution Inventory is used as the basis for solution change control and workshop scheduling.

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

Agency Staff:

- Agency Project Sponsor
- Project Manager
- Organization Change Manager

Accela Staff:

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

Accela Responsibilities:

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

Agency Responsibilities:

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

- Sample Revocation/Suspension Letter
- Merchant Account information (if applicable)
- Hearing Calendars (if applicable)

PROJECT SCHEDULE

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

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

Output:

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

Accela Responsibilities:

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

Agency Responsibilities:

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

PROJECT MANAGEMENT PLAN

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

The following outputs are included:

- Project Management Plan – This document captures how the project will be managed covering disciplines such as change control, configuration management, quality assurance, and risk / issue management.

- Status Report Template – Accela will provide the Agency with a Weekly Status Report that outlines the tasks completed during the prior week, the upcoming tasks that need to be completed during the following week, a current version of the project schedule, risks that require mitigation, and a listing of any issues that may delay the project or jeopardize one or more of the production dates. The status report will be used for the on-going communication with the customer to ensure the Project teams are aware of the activities being completed and upcoming activities.
- Project Artifact Repository – Accela will provide Agency and Accela teams with a SharePoint repository to house project artifacts. Artifacts produced during the project use Accela based templates and the Accela methodology. There is no stated or implied promise that deliverables will be of a specified page length or comply to Agency formatting requirements.
- Governance Process and Committee Meetings – Established and scheduled, to include Accela participation.

Accela Responsibilities:

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

Agency Responsibilities:

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

PROJECT KICKOFF MEETING

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

Accela Responsibilities:

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

Agency Responsibilities:

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

SAAS MIGRATION - SOLUTION PROVISIONING

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

Accela Responsibilities:

- Perform the database migration (Accela, Jetspeed, AGIS, and ADS databases as required)
    a. Copy database to Accela site
    b. Convert the Oracle database to MSSQL
    c. Execute preparation and remediation scripts; drop any custom objects
    d. Import data from the MS SQL DB into Accela SaaS SQL instance
- Provisioning of the subscribed Civic Applications in the hosted non-production development and test environments.
- Update environment specific data in the databases
- Start Accela services and validate the system is functional i.e. login, search, create records, etc.
- Execute automated test tool to ensure proper system functionality
- Agency performs migration validation
- Remediate any data issues found from the migration

Agency Responsibilities:

- Provide Accela with a backup of the Oracle databases for the environments to be migrated
- Validate that the subscribed solution is available.

SAAS MIGRATION - MIGRATE INTERFACES

Accela will migrate the existing on-premise interfaces to work in the Accela Cloud instance.

Accela Responsibilities:

- Repoint service endpoints to new URLs within the Accela SaaS environment
- Update interface EMSE scripting dependences for Azure compatibility

Agency Responsibilities:

- Repoint service endpoints to new URLs within the integrated 3rd party software
- Adjust firewall rules and network topologies as necessary
- Validate the interfaces are available and working

SAAS MIGRATION - CONVERT REPORTS

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

Accela Responsibilities:

- Import SSRS reports into the Accela SaaS environment
- Update SSRS reports to remove dependencies on custom objects (stored procedures, functions)
- Remove dependencies on custom views where possible for existing Ad Hoc Reports

Agency Responsibilities:

- Validate the reports are available and working

SAAS MIGRATION - MIGRATION TESTING

The Accela Cloud instance will be made available for the Agency to perform regression testing.

Accela Responsibilities:

- Facilitate Agency testing and remediation of any issues found resulting from the migration

Agency Responsibilities:

- Perform regression testing and report testing results to the defect register

SAAS MIGRATION - GO-LIVE CUTOVER

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

Accela Responsibilities:

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

Agency Responsibilities:

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

REFINE

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

ACCELA SOLUTION TAILORING

Following the core team training, the team will begin tailoring the Agency's Civic Application Solution. Please refer to Appendix B for the estimated tailoring. Throughout the sessions, Agency staff will continue to learn how the Civic Application features are mapped to Agency record types and to their end-to-end processes.

TAILORING ORIENTATION

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

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

TAILORING SESSIONS

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

Tailoring sessions for each group generally cover the following topics:

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

Sessions adhere to the following format:

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

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

Output:

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

Accela Responsibilities:

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

Agency Responsibilities:

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

REFINE CONFERENCE ROOM CHECKPOINTS

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

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

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

Finalization expectations:

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

Conference Room Checkpoint expectations:

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

Output:

- Finalized tailored solution ready for the Develop stage

Accela Responsibilities:

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

Agency Responsibilities:

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

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

AUTOMATION INVENTORY

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

REPORT INVENTORY

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

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

Accela Responsibilities

- Map agency report needs to the reports available within the subscribed Civic Application Solution.
- Perform standard/minor branding updates (e.g., Agency logo and contact information) for Agency's subscribed solution reports.
- Prepare/validate the standard report(s) for the group of records with the Agency.

- Document a Report Inventory of the Agency system output needs. This inventory will be in the format of a list only.

Agency Responsibilities

- Make available the appropriate key Agency users and content experts to participate in creating the report inventory.
- Provide Accela standard branding information (e.g., Agency logo and contact information) for all standard reports.
- For any custom reports identified, capture the custom report criteria and layouts.
- Designate Agency report writers to participate in report writing training for custom reports.
- Participate in the demonstration of the scenario from Refine stage and review the configurable reports included in the subscribed solution.

REPORT SPECIFICATIONS

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

Accela Responsibilities

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

Agency Responsibilities

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

OPENCOUNTER ONBOARDING, DESIGN, AND CONFIGURATION

Onboarding

- Accela will review data request with relevant subject matter experts
- Setup of the County's OpenCounter instance

Zoning

This deliverable will consist of the following actions:

- Read zoning ordinances to setup unique list of land uses, distinct zones, overlays, and permissions. Configure rules/footnotes as needed. Setup keyword, definitions, and conduct keyword audit. Additional regulations, including planned developments, specific plans or other separate codes may be added at the discretion of OpenCounter's Services Manager and will extend the duration.

Permits Setup

This deliverable will consist of the following actions:

- Use permit scoping list provided by the Agency to setup permits, conditions, fees, and application instructions.
- Accela to configure the Commercial and Residential portals

Accela Responsibilities:

- Provide the Agency with data requests for the setup of OpenCounter
- Conduct design sessions to review the portal.
- Configure OpenCounter for Zoning and Permitting

Agency Responsibilities:

- Make available the appropriate key users and system experts to participate in analysis and validation activities.
- Provide the data requested by Accela.
- Review the design and provide three rounds of feedback.
- Review and approve the final design and theme to validate the comments are incorporated.

DEVELOP

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

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

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

AUTOMATION DEVELOPMENT

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

Accela Responsibilities:

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

Agency Responsibilities:

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

REPORT DEVELOPMENT

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

Accela Responsibilities:

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

Agency Responsibilities:

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

ACCELA GIS CONFIGURATION

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

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

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

Accela Responsibilities:

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

Agency Responsibilities:

- Arrange for the availability of appropriate staff for the system setup, testing, and quality assurance throughout the configuration process.
- Order and procure necessary hardware, non-Accela systems software, and networking infrastructure as specified by Accela.
- Prepare the hardware, software, and network in accordance with the specifications provided by Accela.
- Provide people and physical resources based on the dates outlined in the project schedule.
- Provide Accela with network access to ArcGIS service, or the public link.
- Provide information and data in the formats specified by Accela that will be needed for the GIS implementation.
- Test each GIS integration to ensure that it is configured and functioning.

- Agency staff must review and test the integration and provide feedback to Accela Delivery based on the agreed upon project schedule timeline. Any additional changes identified during review and testing beyond the scope identified above may be subject to a Change Order request.

DEVELOP CONFERENCE ROOM CHECKPOINTS

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

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

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

OPENCOUNTER TESTING AND VALIDATION

Zoning

This deliverable will consist of the following actions:

- Agency tests the ZoningCheck and provides feedback. OpenCounter resolves issues and delivers modifications.
- Documentation of zoning configuration, sources used, assumptions made, and open questions for staff to resolve during testing.

Permits

This deliverable will consist of the following actions:

- Customer tests the Business/Residential Portal(s) and provides feedback. OpenCounter resolves issues and delivers modified Portal(s).
- Documentation of permit, license, and fee logic along with any open questions for staff to resolve during testing.

Accela Responsibilities:

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

Agency Responsibilities:

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

ACCELA SYSTEM TESTING

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

Accela Responsibilities:

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

Agency Responsibilities:

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

DEPLOY

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

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

TRAINING PLAN

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

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

The Training Plan for trainers will include:

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

Accela Responsibilities:

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

Agency Responsibilities:

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

USER ACCEPTANCE TEST (UAT) PLAN

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

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

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

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

It is critical that the Agency devote ample time and attention to the development of their test cases. Accela recommends the Agency use this opportunity to update their Standard Operating Procedures (SOPs) and/or custom Training Materials and leverage these as test cases. The Agency is responsible for creating and verifying all the test cases meet specific business needs. Test cases should confirm record creation, automation, workflows, inspections, citizen access, reporting, etc. and any other specific integration or areas within Accela used in normal business. Accela recommends Agency leverage SOPs as the basis of test cases. Test cases must be validated by the Agency experts and within the scope of the Civic Solutions and tailored configuration. Based on the developed test cases, the Agency is responsible for staffing appropriately so that the UAT activities will fit into the agreed upon onboarding duration. At the conclusion of UAT, the Agency should identify which test cases should be used for future regression testing when upgrades are applied. Accela recommends Test Cases form the basis for the Agency's ongoing Training and User Guides.

USER ACCEPTANCE TESTING (UAT)

User Acceptance Testing is formal testing by the Agency to validate the system is working per the project scope. Throughout the project, the Agency is expected to test components of the system as they are completed (i.e., configuration, reports, integrations, etc.).

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

User Testing includes the following distinct phases:

1. Initial Test – a timeboxed phase where the Agency runs through every test script and logs all issues in the issue tracker.
2. Defect Remediation – a time for Accela to remediate all agreed upon implementation defects found during Initial Test. As time allows the Agency is encouraged to remediate all Medium and Low implementation defects, in preparation of taking ownership of the solution for post go live.
3. Remediation Testing – the phase where the Agency validates that all agreed upon implementation defects have been resolved.

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

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

Any extensions to User Testing durations will require a Change Order. If the Agency does not devote adequate time and staffing to User Testing to completely test the solution, Accela may opt to postpone Go-live at the Agency's expense. Accela will work diligently with the Agency to ensure this does not occur and provide several opportunities for the Agency to add additional staff and time to this effort before recommending a postponement or delay. Additionally, if out of scope items are identified throughout testing, a Change Order will be required based on the need for additional effort and/or extension of timeline.

Accela will ensure the appropriate test environment to be used for User Testing is setup and ready prior to the start of testing activities. This should include deployment of the approved configuration, automation, reports, integrations, and a full mock run of converted data. The Agency will ensure the appropriate Agency and/or 3rd party test environments are available to support integrations.

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

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

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

- **Initial Test:** Agency to execute **all** User Testing test cases. During this phase, Accela and Agency will also begin resolving agreed upon implementation defects identified throughout the testing. At the end of Initial Test, the Agency and Accela will develop and prioritize a User Testing Punch List to include open Critical and High severity implementation defects that are required for go-live, as defined in Appendix E.
    - The punch list must be finalized at the end of the Initial Test phase. Accela will export the current open agreed upon implementation defects from the User Testing issue tracker and review this with the Agency at the close of the phase. Only in-scope issues will be considered for punch list resolution. The Remediation Phase (punch list/defect resolution) will be delayed until the Agency and Accela agree upon the punch list. At this point the issue tracker is closed.
    - If the Agency has not completed execution of all their test cases at the end of the defined duration, then an extension to the project (and Change Order) would be required.
    - **User Testing is a time-boxed activity** so it is critical the Agency identifies all issues in the Initial Test timeframe. If the Agency identifies issues AFTER the Initial Test phase (i.e., after the Punch List is agreed upon), these would be an extension to the project and a Change Order will be required.
- **Defect Remediation:** Accela will remediate, build and implement configuration updates for the User Testing Punch List. In parallel, Agency will remediate Agency-owned development updates from the Punch List.
- **Remediation Testing:** Agency will perform testing to confirm the Punch List items are resolved. This period is for retesting issues found during the initial test period. It is not for performing additional User Testing. New issues go to the parking lot. The User Testing is deemed accepted when Agency has verified the Punch List and severity of Critical and High implementation defects have been addressed. Accepted deliverable will become the configuration code set that will be deployed to the PROD environment.

Output:

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

Accela Responsibilities:

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

Agency Responsibilities:

- Identify resources who will participate in User Testing.
- Any Critical and High priority issues assigned to the Agency must be responded to in the SharePoint tracker within 3 business days. For example, additional information needed or the results of Agency retest.

- Ensure that testers are adequately trained on the system to accurately execute test cases.
- Lead and manage the User Testing effort, including resources and test execution schedule.
- Execute the User Testing test cases developed by the Agency during the User Testing test plan activities.
- Make available the appropriate key Agency users and content experts to participate in User Testing as defined and managed by Agency.
- Resolve all issues related to Agency custom development (i.e., reports and integrations).
- Resolve Medium and Low severity implementation defects related to tailored components.
- Determine which test cases will be used for ongoing regression testing.
- Leverage test cases as a basis for ongoing training and user guides.

PRODUCTION CUTOVER "GO LIVE"

Production date is defined as the official date in which Accela Civic Platform moves from the test environment to production for daily Agency usage. This date will be agreed to by both Accela and the Agency at project inception. It may be altered only by Change Order agreed to by both parties. In the weeks prior to moving to Production, Accela will assist in final data conversions, system validation, staff preparation and training, and coordination of deployment.

Output:

- Deployment support prior to moving to Production.
- Assistance with setup of Integration points in Production.
- Final Conversion run during cutover.
- Accela Civic Platform used in Production environment for Agency daily use.

Accela Responsibilities:

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

Agency Responsibilities:

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

POST GO LIVE SUPPORT AND TRANSITION TO ACCELA SUPPORT

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

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

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

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

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

Output:

- Accela will provide support immediately following deployment (go-live).
- Accela will work with the Agency to identify and address issues identified during this period using a Post-Production Issues List. This list will be comprised of issues related to the defined deliverables listed in this SOW, which will be addressed by Accela.

- Finalized post-production copy of issues list.
- Transition of Agency from Professional Services team to Customer Support for ongoing support.

Accela Responsibilities:

- Provide post-production support for Accela developed configuration and components. For example:
  - Assistance with new UI or browser settings since not every user has accessed the new version of our software.
  - Issue research.
  - Escalation of issues that can't easily be resolved.
- Assist with the identification of issues for the Post-Production Issues List.
- Assist with issues that may arise related to the deliverables in this onboarding package.
- Transfer ongoing support of the Agency to the Accela Customer Support program.

Agency Responsibilities:

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

CIVIC PLATFORM TRAIN-THE-TRAINER TRAINING

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

Output:

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

Accela Responsibilities:

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

Agency Responsibilities:

- Notify Accela trainer of selection of up to 3 record-types for training demonstration and workshops.

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

APPENDIX E: PROJECT RESOURCES

AGENCY RESOURCES

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

Agency Resources	Description
Project Sponsor	Responsibilities include: • Represent the strategic and financial interests of the Agency within context of the project • Create an environment that promotes project buy-in • Stay informed and provide high-level oversight throughout the duration of the project • Serve as the primary escalation point to address project issues and remove obstacles in a timely manner
Steering Committee	• Provide input to the development of the project, including the evaluation strategy; • Provide advice on the budget; • Define and help to achieve the project outcomes; • Identify the priorities in the project – where the most energy should be directed; • Identify potential risks; • Monitor risks; • Monitor timelines; • Monitor the quality of the project as it develops; • Advise (and sometimes making decisions) about changes to the project as it develops
Project Manager	Agency will provide a dedicated Project Manager throughout the course of the engagement. Responsibilities include: • Overall administration, coordination, communication, and decision-making associated with the implementation • Plan, schedule, and track the implementation with Accela and across departments within the agency • Primary responsibility for the coordinating and scheduling of Agency employees and facilities in support of project activities. • Supervision of the Agency team members to ensure the project team stays focused, tasks are completed on schedule, and that the project stays on track
Product/System Administrator	• Participate in system configuration and build out as much as possible, working closely with Accela implementation team

	• Assist Agency end users with testing • Attend system administration training • Post go-live, take over internal administration of Accela system
Division/Departmental Business Leads	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. The designated Leads assist the Agency Project Manager in delegating project tasks, driving priorities for the department and ensuring action items are completed in a timely manner. Responsibilities include: • Attending tailoring sessions • Willing and able to gather data and make decisions about business processes • Assumes the Responsible Expert role for any record groupings assigned to the department • Lead the Conference Room Checkpoints for the department record groups • Participate in knowledge transfer opportunities in order to understand the solution
Division/Departmental Subject Matter Expert (SME)	Responsibilities include: • Being trained on the Accela system and proactively learning the system as it is implemented • Being fully engaged in the sessions and system configuration activities • Provide expertise in their business area • Writing of test cases • Assist internal efforts towards the creation of reports, integrations & conversions • Review and testing of the solution • Review and testing of the converted data • Actively participate in the full implementation of the Accela solution
Integration Developer	Responsibilities include: • Liaison between Accela and 3rd party providers • Understand integration needs of Agency and build designs • Attend the Construct API training • Write integration methods to meet the Agency requirements • Participate in unit and system testing
Report Developer	Responsibilities include: • Understanding reporting needs of Agency • Attend the AdHoc training • Write or amend reports as the Agency requirements determine • Participate in unit and system testing
Data Conversion Leads	Responsibilities include: • Lead efforts to cleanse the legacy data to be migrated

	• Attend Accela Data Conversion • Create data mappings • Write extraction scripts, transformation, business rule routines to move data from legacy data source to Accela staging area • Review and validation of the converted data • Participate in mock data runs during the implementation and final production conversion
Organization Change Management Agent	Accela does not provide Change Management services as it relates to Organizational Change Management (OCM). Accela supports the OCM objectives by supplying technical training, content for awareness meetings, demonstrations to user groups during the project, but we find the most success for the Agency to own the OCM objectives and have a dedicated change agent with the organization. Responsibilities related to the Accela workstream: • Have a designated OCM representative attend the Accela analysis sessions and determine how best to align Agency operational process with technical solution workflow. • Access the Accela test environment to become more familiar with the solution. • Participate in verification of the solution and attend Conference Room Checkpoints. • An Accela trainer can work with the OCM representative on a plan on how the Accela end user training will be integrated with the OCM campaign.
Trainer	• Primary responsibility for understanding the solution through attending the Train-The-Trainer sessions • Build the training materials for end users from the materials provided from Accela • Conduct End User Training

ACCELA RESOURCES

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

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

	Project Manager works with the Project Sponsors, Subject Matter Experts and other stakeholders to ensure the timely delivery of a quality product. The Project Manager undertakes the project administration tasks including: • Develop and maintain project plan • Resource management and tracking • Risk identification and mitigation • Issue management and escalation • Status reporting • Provide direction and facilitate team meetings
Solution Architect	Accela's Solution Architect is responsible for the overall solution architecture and will: • Recommend standard and custom solutions for business requirements • Architect new custom solutions for Agency-specific scope • Provide Solution Architect oversight throughout the implementation • Guide the customer and project team with best practices and standards • Confirm delivered solutions follow best practices and standards
Implementation Lead	The Implementation Lead assigned to the project will have significant experience in the business functions as well as the product functionality and is responsible for: • Lead tailoring sessions • Lead the tailoring/system configuration • Providing training/mentoring to Agency staff • Coordinate with technical team members through analysis and testing as it relates to Agency processes
Implementation Consultant	Implementation Consultant resources support the project as-needed and typically focus on the following tasks: • Provide support during tailoring sessions • Perform tailoring/system configuration • Unit and functional testing
Technical Consultant(s)	Accela Technical Consultants are involved in the project to perform the following responsibilities: • Lead integration analysis, specifications and development • Lead report analysis, specifications and development • Provide data conversion expertise, training, mapping assistance, and execute data conversion runs
Training Consultant	Training Consultants are responsible for Accela Training classes with assistance from Implementation consultants, depending on the nature of the specific project.

APPENDIX F: DEFECT DEFINITIONS

ISSUE TYPES

1. **Implementation Defect** – Implementation Defects relate to elements configured or built as part of the project such as record configuration, workflow configuration, business rules/automations, custom integrations, and reports. An issue is considered an Implementation Defect when the software is not behaving as per the approved software version (e.g., development stage complete). Data Conversion issues are considered Implementation Defects if the data was available in the proper format via the source data file but is not converted as defined in the approved Data Mapping document and as executed in the previously-approved final mock run. For definitions of defect severities, refer to table in next section.

2. **Product Defect** – Product Defects are errors due to unexpected behavior within the Accela Platform source code. A Product Defect cannot be resolved through configuration changes and requires a new product release or hotfix/patch.

3. **Non-Defect Issue Examples**
    a. **Change** – Modifications or additions to the approved specification are considered changes. Examples include:
        i. Changes to record configuration, new or changes to custom fields, changes to workflow configuration, new or changed expressions, new automation scripts, addition of business rules to existing automation script to account for previously un-documented exception cases or new requirements
        ii. Addressing a Product Defect or product limitation via configuration changes (implementing a work around)
        iii. New report or change to existing report format, queries, or business logic
        iv. New integration or new transaction for existing integration or change to existing integration business logic
    b. **New Requirement** – Previously undocumented business need driving additions or changes to the configuration is considered a new requirement
    c. **Conversion Source Data Issue** – Data cleansing issues such as data that is incomplete, erroneously formatted, or misplaced due to data errors found in the source data set often lead to undesirable or unexpected product behavior or system errors
    d. **3rd Party Product Issue** – Issues related to 3rd party system errors or results returned from a 3rd party system back to Accela through an integration. E.g., data in APO dataset is not up to date and causing errors in Accela or an error in the Financial system is leading to Accela transaction reconciliation problems
    e. **Product Enhancement** – The Accela product does not currently include or support the desired feature
    f. **Training Issue** – The end user reported a problem that is attributed to user error
    g. **Infrastructure Issue** – The issue is rooted in Agency infrastructure or environment settings (such as server hardware/software, network infrastructure, security software/settings, end user hardware/software)

DEFINITION OF DEFECT SEVERITIES

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

Severity Level	Description
Critical	This is a "must fix" problem, a "showstopper." The problem is causing a major system error, fatal error, serious database corruption, serious degradation in performance, major feature malfunction, or is preventing a major business goal from being realized. The problem does not have a workaround that is reasonably acceptable to the corresponding end-users. Examples: 1. The Address, Parcel, Owner search is not returning any results which means an Applicant or Staff cannot submit a record because the Parcel is required and requires validation with the Agency's GIS system 2. An error is displaying when trying to select the submit button during Intake which is preventing the Record from being created. The error message is not providing any direction to the user other than contact your system administrator. 3. The Payment Integration is down which would not allow the online records from being created and the back-office staff would not be able to proceed with workflow due to business rules preventing the advance of workflow if there are outstanding fee due.
High	This is a problem that is causing significant loss of feature functionality, but the system can recover from the problem and it does not cause total collapse of the system. The system does not meet a business goal or a portion of a business goal; performance degradation is minor, but not within established exit criteria; or minor database issues may exist (e.g., single rows or fields may be locked). The problem does have a workaround that is reasonably acceptable to the corresponding end-users. Examples: 1. Fees are wrongly being applied to records based on business rules or configuration. The workaround would require business rules (scripts) to be disabled and staff would manually apply fees or staff voiding fees or refunding fees if duplication is occurring. 2. Notification going to citizens where the URL for the online portal, the Record ID, Decision, or attachments are missing. The workaround, Staff would take more calls around the notification received by the citizen. 3. Notification being sent to an incorrect contact on the record. The workaround, Staff would take more calls around the notification received by the citizen. 4. Incorrectly activating a workflow task status, for example where the task was not activated or based on business rules closing the workflow task. The workaround, Supervisor would need to override the workflow task status to activate the correct workflow task to proceed with the application life cycle. 5. Workflow assignment is either not assigning to the correct department or is not assigning to a department (i.e. department would be blank). The workaround, Supervisors or Managers would need to use the Unassigned Reviews report for workflow assignment.

	6. A Notification going to one of the contacts identified as recipient, but not all (for example going to the Applicant, but not the Owner). The workaround, Staff would take more calls around the notification not received by the citizen
Medium	This is a problem that is causing minor loss of feature functionality. Optional workarounds are acceptable but causing significant efficiency loss. Problem is cosmetic, but public facing and deemed go-live critical. Examples: 1. Notification going to citizens where Assigned Reviewer, Address, or Contact Types is missing. The workaround, Staff would take more calls around the notification received by the citizen. 2. Notification going to one of the contacts identified as recipient, but not all (for example going to the Applicant, but not the Owner). MUST be going to Applicant to be considered medium. The workaround, Staff would take more calls around the notification not received by the citizen. 3. Workflow assignment for the round-robin is incorrectly assigning staff users. The workaround, Staff assigned to the record would need to re-assign the workflow to the appropriate Staff 4. Incorrectly setting due dates in the workflow based on defined business rules. The workaround, Staff would need to manually set the due date. 5. Required element such as document types, contacts, or custom fields are allowing the user to proceed w/out having met the requirement. The workaround, Staff would need to validate all required elements and if one was missing use the workflow task status of "Additional Information Required" to have the user provide the required information to proceed with the application process.
Low	This is a problem that is causing minor loss of feature functionality. Optional workarounds reasonably acceptable to the corresponding end-users are available with minor efficiency loss. Minor issues, misspellings, cosmetic changes, etc. Examples: 1. Misspellings on instructions, data elements, report content, or notifications content. 2. Font inconsistencies, if data elements or online portal language is written in different fonts in different sections. 3. Inconsistency with Console configuration between departments, for example the record selection where there is the drop down rather than the decision tree or constraint within the defined filter is not displaying the entire defined criteria.

Accela Civic Platform Assessment

Brevard County, FL

May 23, 2023

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OVERVIEW

The system review for Brevard County was conducted in April 2023, with the following objectives.

5. To evaluate the current state of the County's configuration.
6. To determine if process improvements and/or newer functionality could be implemented to maximize efficiency.
7. To understand daily issues faced by County staff and citizens while using the Accela Civic Platform.
8. To determine if moving to Accela SaaS is the correct approach for the County.

The entire assessment consisted of two phases. In phase one, 11 interview sessions, spanning two days, were conducted with the County's Accela Support and business users. In phase two, Accela reviewed the configuration associated with the 289 record types documented in Appendix B.

SUMMARY OF FINDINGS

After performing the system review, the following are our findings:

4. Best practices and standardization can be applied to significantly improve user experience and streamline processes across the entire Accela Civic Platform.
5. Out of the box functionality is not fully utilized.
6. Moving to Accela SaaS would greatly benefit the County.

DETAILED FINDINGS

The system review consisted of evaluating both the configuration and automation for all modules within the on-prem environment. During the assessment, we found that some areas are using best practices and standardization for configuration, however, additional best practices and standardization should be applied within the system. Applying these changes would further increase efficiency, alleviate maintenance issues and overall, provide a better user experience for both the system end users and the County customers. In addition, automation should be applied to many of the business processes to alleviate unnecessary effort for the County's staff. The following details the findings for each of the areas reviewed within the Civic Platform. Key findings have been categorized into three groups: Record Types and Components, Automation and Standard Functionality.

RECORD TYPES AND COMPONENTS

The main area where best practices and standardization can be applied is related to record types and the components which make up these record types. Components include, Intake Forms, Workflows, Custom Field Groups, Fee Schedules, Inspection Groups, Status Groups, Document Groups and Pageflows. Currently, the County's Civic Platform environment consists of 289 total record types across five modules. Based on the configuration and meetings with internal staff, the County's implementation consists of too many record types. This ultimately provides a poor user experience as both County staff and customers are unsure of which record to submit, which usually means the incorrect record is often selected. From a maintenance perspective, maintaining the large number of record types can also be a tedious and difficult task as similar changes associated with multiple record types may need to be replicated a significant number of times. One example of this is for a Commercial Addition/Alteration Permit, which currently has five options for this type of permit: Commercial Addition-Alteration Miscellaneous, Commercial Addition-Alteration Multifamily Residential, Commercial Addition-Alteration Other Non-Residential Building, Commercial Addition-Alteration Structures Other Than Buildings and COM Addition

Alteration. Another example is the Commercial Demolition Permit. This permit currently has three options for the permit: Commercial Demolition Misc., Commercial Demolition Other Non-Residential Building and Commercial Demolition Structures Other Than Buildings. Accela's implementation, using best practices, would only have two applications for the eight total applications in the examples above. Accela would consolidate the Commercial Addition/Alteration Permits into a single record and the Commercial Demolition Permits into a single record as well. Standardizing processes and record components would also be done at the same time. Custom fields would be updated so that the data elements captured would be standardized and consolidated to fit the corresponding record. Workflows would also be consolidated for the record types above, as well. Currently configured unique workflows, which aren't unique, can be updated into a single workflow. This exercise should be conducted across all record components so that efficiencies across the County can be achieved for both processing records and for maintenance.

In addition, during the system review, we found many records configured in the Civic Platform to be ones that Accela would not consider as record types but are currently setup as record types within the environment. Below are a few examples of these record types. These processes almost always are a part of a record and not a standalone process. These record types should be disabled or removed, and the processes should be incorporated into the corresponding records.

1. Development
    a. Bond
    b. Engineering Revision
    c. Commercial Impact Fees
    d. Residential Impact Fees
    e. PZ Miscellaneous Fees
    f. ROW Final Inspection
    g. Site Plan Final Inspection
    h. Subdivision Final Inspection
2. Enforce
    a. Magistrate Audio

Accela's best practice for configuring licensing records is to implement a three-record solution for a license type. Each license type would include an Application, License and Renewal record. The solution allows for historical information to always be available. The application record will always have information at the time of application submittal for a license. The license record will always have the most recent information for the active license. Finally, the renewal record will have information associated to the license at the time of each renewal. Currently, Brevard County is not configured using this three-record architecture. After reviewing the configuration, the following is a breakdown of the record count for each module and potential future count, based on Accela's consolidation best practices discussed above. The records associated with Licenses are the same because additional consolidation meetings would need to be conducted due to the nature of complexity within the solutions. That said, Accela is confident that the 146 unique solutions can be significantly consolidated.

Module	Current Record Count (Solutions)	Future Record Count (Solutions)
Building	94	39
Development	39	18
Enforce	9	4

Utilities	1	1
Licenses	146	

AUTOMATION

The County is currently using Accela Scripting 2.0, which is a very outdated tool used for writing JavaScript to automate processes within the Civic Platform. The outdated tool is very difficult to use when writing JavaScript as developers are not able to use normal syntax related to the language. The user interface for developing code is also counterintuitive so training on both syntax and script development within the Civic Platform would be needed, even if the County hires additional developers who are proficient with writing JavaScript code. In addition, debugging issues associated with these scripts is a lot more difficult. Accela strongly recommends that the County upgrade to Accela Scripting 3.0 as the issues listed above do not exist in the new tool. Upgrading to Accela Scripting 3.0 would include the conversion of current scripts, as well. Applying Accela Scripting 3.0 also allows for the County to use Accela's JSON configurable scripts. Configurable scripts are automation that have already been developed with defined functionality, which include, workflow updates, adding fees, adding/scheduling inspections, issuing/renewing licenses, emailing contacts and much more. Using configurable scripts allows users that are not proficient in JavaScript to still update/add/remove automation within the system since the code already exists and only needs to be configured for the automation to be applied. The code is all maintained by Accela in master scripts and the user responsible for automation can essentially update a file by adding key/value pairs that the script reads to determine the type of automation that is triggered. If there is certain functionality that does not exist within the configurable scripts, users can also add custom functions on top of the automation already in place. Using these scripts also help minimize problems with maintenance and issue resolution since the code is not custom. The County will also be able to leverage any enhancements made to these scripts by Accela as they will be released with upgrades. Lastly, scripting 3.0 allows for the use of a script repository, i.e., Github, for better management of code.

Many users across the County are currently manually performing tasks that the Civic Platform could automate. Email correspondences (For application approvals, application denials and missing information), fee calculations, status updates are all processes that should be automated when possible. Performing these tasks manually is inefficient and can be easily missed. The County needs to incorporate scripts for these tasks either by developing custom scripts or using the configurable scripts available in scripting 3.0. Accela's Configurable scripts also include automation related to Licensing processes outside of issuing and renewing. Predeveloped automation for about to expire and expiration notices are also included in the package. The County is currently performing these license notifications outside of the Civic Platform and the use of the configurable scripts can significantly streamline these processes.

STANDARD FUNCTIONALITY

Using the Accela Civic Platform functionality to send emails during crucial points in a business process is always recommended for our customers. Currently, this is not fully utilized within the County and can be a significant way to reduce inefficiencies within County processes. That said, using XAPO or External APO for GIS data, is a best practice for our software implementations. Accela has a standard interface with ESRI's ArcGIS where the Civic Platform can consume a map service provided by the County to associate address, parcel, owner, and other GIS data to a record. The County is currently not using XAPO and is

using APO loads to get the most recent GIS data. APO loads require the County's GIS team to carry the additional responsibility for getting the most updated GIS data into the database when they receive it. The scripts to load the data are currently already developed, but if the database structure were to change, updates to the scripts would need to be made which could introduce issues to the load and the internal team would need to mitigate the issues. These responsibilities could be removed by using XAPO as the scripts to load the data would no longer be needed and configuring the interface would allow the County to use existing map services used for other applications across the County. The Civic Platforms interface with ArcGIS also allows for users to interact with a map within the solution. Users can view layers associated to a service on a map to conduct day to day business.

RECOMMENDATIONS

In 2018 Accela introduced Civic Applications. Civic Applications are Accela developed and managed solutions, which means each solution is tested internally before introducing them to customers and these solutions are built with our best practices and standardizations. With the knowledge and experience we have in the industry; we have built robust and reliable solutions. All solutions are vetted to validate that all critical data elements are captured within processes. In addition, agencies will always get enhancements anytime updates are made to Civic Applications. For example, if a new notification template or report is added to a solution, agencies will be able to leverage them within their process. ***Each Civic Application consists of all components that would make up a record (if applicable): record type, workflow, inspections & checklists, custom fields, custom lists, fees, and automation, to name a few. The idea of a Civic Application is that an agency should be able to use the solution out of the box with little customization.*** Currently, we have Civic Applications ***that cross four major categories: Building Communities, Protecting Citizens, Growing Business and Public Health. The following list provides the included solutions for each category.***

1. ***Building Communities:***
    a. ***Building***
    b. ***Planning***
    c. ***Enforcement***
    d. ***Public Works***
    e. ***Service Request Management***

2. ***Protecting Citizens:***
    a. ***Fire Prevention***

3. ***Growing Business:***
    a. ***Business Licensing***
    b. ***Occupational Licensing***
    c. ***Cannabis***
    d. ***Alcoholic Beverage Control***

4. ***Public Health:***
    a. ***Environmental Health***

It is our recommendation that the County implement Civic Applications as many record types within the County fit within a corresponding Civic Application. Since Civic Applications also include Accela's configurable scripts, the County will be able to leverage the automation included to streamline current processes. In some instances, a record type may not have a corresponding Civic

Application, however, we still recommend that these best practices be used for all processes within the Civic Platform.

In addition, we recommend a move from an On-Prem to a SaaS solution. Accela Civic Platform is currently on version 23, while the County is on an outdated version 9. Due to issues encountered with upgrading, a benefit in moving to the Cloud allows for Accela to take on the responsibility for upgrades and system maintenance, which gives County staff the much-needed time for their day-to-day responsibilities. Another advantage to moving to a SaaS solution is the County will no longer need to maintain physical servers and other additional hardware. The County would also have the capability to use Accela's Enhanced Reporting Database (ERD) in the Cloud to develop reports against live data, so processes querying the database could still be the same. Moving to SaaS would also include upgrading to scripting 3.0.

Lastly, during the onsite meetings, Accela has concluded that users would benefit greatly with additional end user training. Especially with the significant jump in versions, a lot of new functionality and user experience has changed. Understanding Accela's capabilities will help make users more efficient in their day-to-day interactions with the system.

APPENDIX A – BREVARD PAIN POINTS

Meetings were conducted with multiple groups during the onsite assessment. Below are the pain points provided by the department end users. The recommendations for each item may be different than the ones provided above as these are related to resolving the specific issue and the above is County wide.

LEADERSHIP AND EXPECTATIONS

New Hires	**Description:** Currently, there is a large investment in time for new hires. It takes approximately 8 months for new hires to be proficient using Accela Civic Platform as there are a large number or records and unique processes to learn within the system.
	Recommendation: The County should standardize and consolidate processes (record types) to shorten the onboarding time for new hires.

BUILDING

Expired Permits	**Description:** Currently, users do not know when permits have expired.
	Recommendation: The County should create a quick query to display records with an expiration date that has passed. The user can then bulk update the status to "Expired".
Auto Issuance	**Description:** A lot of time is needed to update permits that should auto issue after all fees have been paid in ACA.
	Recommendation: The County should add a script to update the status to "Issued" when a record is created and paid within ACA. The permit report could then be made available in ACA for the customer to print.
Enabled Record Types	**Description:** The record list includes records that should not exist when creating a new application.
	Recommendation: The County should disable all record types that are no longer needed in AA Admin.
Performance Issues	**Description:** The system seems to be slow at times. Users will get the "spinning wheel of death."
	Recommendation: The County needs to confirm that the servers meet minimum requirements or move to SaaS.
AEDR	**Description:** Stamp usage, document versioning and revision process is counterintuitive in the system.
	Recommendation: The County should look at implementing a 3rd party plan review system.
Inspections	**Description:** Completed inspections aren't correctly displayed in the application. This causes permits to be expired, when in fact, the expiration date should be extended.
	Recommendation: Many users are not using Accela Mobile to complete inspections. Other methods are used to track this information and the data will sometimes not be updated in the system. The County needs to all use Accela Mobile to complete inspections so that information is accurate.
	Description: Inspections are not cued up on a record so often, customers do not know what inspections are needed.
	Recommendation: The County should add a script to add potential inspections as "Pending" when a record is created.

LICENSING

Out of Box Functionality	**Description:** A lot of manual work is needed to process licensing applications in the system. These items include: 1. Sending emails. 2. Sending expiration notices. 3. Submitting license applications as the County currently does not have any licensing records in ACA. 4. Assessing fees.
	Recommendation: The County should revisit the licensing solutions implemented within the Civic Platform. Licensing solutions should be modernized or reimplemented as much of the manual work can be automated. Also, during this time, exposing the record types to ACA should be done to relieve the back-office users from having to submit applications on the behalf of customers.

CODE ENFORCEMENT

Performance Issues	**Description:** The system seems to be slow at times. Users will get the "spinning wheel of death."
	Recommendation: The County needs to confirm that the servers meet minimum requirements or move to SaaS.
Closing Records	**Description:** Records are not closing when all tasks are completed.
	Recommendation: The County should update the workflow configuration so that once the last task is completed, the record status will update to "Close."
ACA Complaints	**Description:** Currently, users can't create complaints through ACA.
	Recommendation: The County should implement pageflows for complaints that can be submitted through ACA.
Duplicate Work	**Description:** Users are writing case information on paper and then entering the data into Accela once they are back in the office.
	Recommendation: The County should use Accela Mobile for all field officers. This will allow the users to only have to do their work in the field one time.
Confidential Information	**Description:** Some instances of confidential information is being displayed.
	Recommendation: The County should update field security for these data elements.

DEVELOPMENT/PLAN REVIEW

Tasks	**Description:** It is difficult to find reviews that need attention.
	Recommendation: The County should use the filter functionality within My Tasks to display the correct tasks.
Fees	**Description:** Fees based on acres are currently calculated incorrectly.
	Recommendation: The County should update the fee script so that fees are rounded up.
Emails	**Description:** Emails for plan approvals are manually sent outside of Accela.

	Recommendation: The County should implement scripts to send emails for approvals, denials and when additional information is needed. These emails can be triggered through workflow task and status combinations.

COUNTER OPERATIONS/IMPACT FEES

Report	**Description:** The "Receipt_AA_2016_SSRS" report sporadically generates with incorrect data.
	Recommendation: The County should review the report query and run the report for smaller ranges to try and pinpoint the issue.
	Description: There are multiple fund reports that need to be run within the system.
	Recommendation: The County should review the report queries and make updates so that the reports are consolidated into one.
Fees	**Description:** Receipts for impact fee payments need to be printed, stamped, and scanned in.
	Recommendation: The County should develop the receipt report within Accela so that the manual work is not needed, and the report can be auto generated.
	Description: Impact fees are captured and calculated using an Excel spreadsheet that needs to be maintained daily.
	Recommendation: The County should implement this process within Accela so the information is stored in a central location and use the Civic Platform to perform the calculations.

ADDRESS ASSIGNMENT

Searching	**Description:** Searching for a parcel is difficult on the Parcel page because the township and other fields aren't available.
	Recommendation: The County should review and enable the relevant fields for the Parcel page. Also, map the corresponding field to the correct parcel attribute so the data is pulled onto the record.
Address Creation	**Description:** The appraiser's office provides information related to the property owners by email and the addresses are then manually created within Accela. Once created, this information is then emailed back to the appraiser's office with the new address data. This process is a very time-consuming task.
	Recommendation: The County should develop a batch process to create and email the new addresses in Accela.

CITIZEN PORTAL (BASS)

Record Submitted Screen	**Description:** Verbiage on the license record acceptance screen currently displays as "Pending," which causes confusion and customers will call in because they are unsure if the record was submitted or not.
	Recommendation: The County should update the configuration of the pageflow with accurate verbiage.
Customer Support	**Description:** Customers will call in asking for assistance with applying online as the process is difficult to understand in ACA.

Recommendation: The County should create training videos of users walking through an application in ACA. These should then be made available online for customers to view. In addition, additional help text or training guides should be made available in ACA.

APPENDIX B – CONFIGURED RECORD TYPES

Record Alias	Record Type
Commercial Addition-Alteration Miscellaneous	Building/Commercial/Add - Alt/Misc
Commercial Addition-Alteration Multifamily Residential	Building/Commercial/Add - Alt/Multi-Family
Commercial Addition-Alteration Other Non-Residential Building	Building/Commercial/Add - Alt/Other Non-Residential Building
Commercial Addition-Alteration Structures Other Than Buildings	Building/Commercial/Add - Alt/Structures Other Than Building
COM Addition Alteration	Building/Commercial/AdditionAlteration/NA
Commercial Demolition Misc.	Building/Commercial/Demolition/Misc
Commercial Demolition Other Non-Residential Building	Building/Commercial/Demolition/Other Non-Residential Building
Commercial Demolition Structures Other Than Buildings	Building/Commercial/Demolition/Structures Other Than Building
COM Electrical	Building/Commercial/Electrical/NA
County Alarm	Building/Commercial/Fire/Alarm
County Auto Extinguish	Building/Commercial/Fire/Auto Extinguish
City Alarm	Building/Commercial/Fire/City Alarm
City Auto Extinguish	Building/Commercial/Fire/City Auto Extinguish
City Building	Building/Commercial/Fire/City Building
City Site	Building/Commercial/Fire/City Site
City Sprinkler	Building/Commercial/Fire/City Sprinkler
City Water Flow Test	Building/Commercial/Fire/City Water Flow Test
County Sprinkler	Building/Commercial/Fire/Sprinkler
County Water Flow Test	Building/Commercial/Fire/Water Flow Test
COM HVAC-Mechanical	Building/Commercial/HVAC-Mechanical/NA
COM Marine Construction	Building/Commercial/Marine Construction/NA
COM Minor Alteration	Building/Commercial/Minor Alteration/NA
Commercial Minor Electric	Building/Commercial/Minor/Electrical
Commercial Minor HVAC Mechanical	Building/Commercial/Minor/HVAC-Mechanical
Commercial Minor Misc.	Building/Commercial/Minor/Misc
Commercial Minor Plumbing	Building/Commercial/Minor/Plumbing
Commercial Minor Re-roof	Building/Commercial/Minor/Reroof
Commercial Change of Occupancy Classification	Building/Commercial/Misc/Change Of Occ Classification
Commercial Misc Exhaust Hood	Building/Commercial/Misc/Exhaust Hood
Commercial Misc Alterations	Building/Commercial/Misc/Minor Alterations

Commercial Misc Temporary Structure-Tents	Building/Commercial/Misc/Temporary Tent Structure
COM Miscellaneous	Building/Commercial/Miscellaneous/NA
COM New Construction	Building/Commercial/New Construction/NA
Commercial New Foundation Only	Building/Commercial/New/Foundation Only
Commercial New Multifamily Residential	Building/Commercial/New/Multi-Family
Commercial New Other Non-Residential Building	Building/Commercial/New/Other Non-Residential Building
Commercial New Structures Other Than Buildings	Building/Commercial/New/Structures Other Than Building
COM Plumbing	Building/Commercial/Plumbing/NA
COM Renovation	Building/Commercial/Renovation/NA
COM Reroof	Building/Commercial/Reroof/NA
COM Solar Photovoltaic	Building/Commercial/Solar Photovoltaic/NA
COM Solar Thermal	Building/Commercial/Solar Thermal/NA
City Fire Permit	Building/Fire/City/NA
Miscellaneous Bingo Licenses	Building/Miscellaneous/Bingo/NA
Miscellaneous Master Plans	Building/Miscellaneous/Master Plan/NA
Miscellaneous Special Events Permit	Building/Miscellaneous/Special Events/NA
Residential Accessory Structure	Building/Residential/Accessory Structure/NA
Residential Addition-Alteration Manufactured Home	Building/Residential/Addalt/Manufactured Home
Residential Addition-Alteration Misc	Building/Residential/Addalt/Misc
Residential Addition-Alteration Swimming Pool	Building/Residential/Addalt/Pools
Residential Addition-Alteration Single Family Home	Building/Residential/Addalt/Single Family Home
Residential Addition Single Family Residence	Building/Residential/Addition/Single Family Home
Residential Demolition Single Family Residence	Building/Residential/Demolition/Detached Single Family
Residential Demolition Mobile-Manufactured Home	Building/Residential/Demolition/Manufactured Home
Residential Demolition Misc.	Building/Residential/Demolition/Misc
RES Demolition	Building/Residential/Demolition/NA
RES Doors-Windows-Shutters	Building/Residential/Doors-Windows-Shutters/NA
RES Electrical	Building/Residential/Electrical/NA
Residential HVAC	Building/Residential/Expedited/HVAC
Residential Misc.	Building/Residential/Expedited/Misc

Residential Re-roof	Building/Residential/Expedited/Reroof
RES Fence	Building/Residential/Fence/NA
RES Generator	Building/Residential/Generator/NA
RES HVAC-Mechanical	Building/Residential/HVAC Change Out/NA
RES Marine Construction	Building/Residential/Marine Construction/NA
Residential Minor Electrical	Building/Residential/Minor/Electrical
Residential Minor HVAC	Building/Residential/Minor/HVAC
Residential Minor Misc	Building/Residential/Minor/Misc
Residential Minor Plumbing	Building/Residential/Minor/Plumbing
RES Mobile Home	Building/Residential/Mobile Home/NA
Residential Mobile Home	Building/Residential/Mobile-THOW/NA
Multi-Family Addition	Building/Residential/Multi-Family Addition/NA
RES Multi-Family Addition Alteration	Building/Residential/Multi-Family AdditionAlt/NA
RES Multi-Family Minor Alteration	Building/Residential/Multi-Family Minor Alteration/NA
Multi-Family New	Building/Residential/Multi-Family New/NA
Multi-Family Renovation	Building/Residential/Multi-Family Renovation/NA
Residential New Single Family Residence	Building/Residential/New/Detached Single Family
Residential New Mobile-Manufactured Home	Building/Residential/New/Manufactured Home
RES Plumbing	Building/Residential/Plumbing/NA
RES Pool Resurface	Building/Residential/Pool Resurface/NA
RES Pool	Building/Residential/Pool/NA
RES Reroof	Building/Residential/Reroof/NA
RES SFR Addition Alteration	Building/Residential/SFR Addition Alteration/NA
RES SFR Addition	Building/Residential/SFR Addition/NA
RES SFR Aluminum Structure	Building/Residential/SFR Aluminum Structure/NA
Residential SFR Exterior Alteration	Building/Residential/SFR Exterior AddAlt/NA
Residential SFR Interior Alteration	Building/Residential/SFR Interior Alteration/NA
RES SFR Minor Alteration	Building/Residential/SFR Minor Alteration/NA
RES SFR Renovation	Building/Residential/SFR Renovation/NA
RES SFR-Duplex New	Building/Residential/SFR-Duplex New/NA
RES Solar Photovoltaic	Building/Residential/Solar Photovoltaic/NA
RES Solar Thermal	Building/Residential/Solar Thermal/NA
Residential Solar	Building/Residential/Solar/NA
RES Tiny House on Wheels	Building/Residential/Tiny House on Wheels/NA
Bond	Development/Bond/NA/NA
Engineering Revision	Development/Engineering Revisions/NA/NA
Commercial Impact Fees	Development/Impact Fees/Incorporated/Commercial

Residential Impact Fees	Development/Impact Fees/Incorporated/Residential
PZ Miscellaneous Fees	Development/Miscellaneous/Planning Zoning/NA
ROW Final Inspection	Development/Row/Final Inspection/NA
Right-of-Way	Development/Row/NA/NA
Site Construction Permit	Development/Site Plan/Construction Permit/NA
Site Plan Final Inspection	Development/Site Plan/Final Inspection/NA
Site Plan Major	Development/Site Plan/Major/NA
Site Plan Minor	Development/Site Plan/Minor/NA
Site Plan Pre App	Development/Site Plan/Pre App/NA
Severance	Development/Site Plan/Severance/NA
Subdivision Final Inspection	Development/Subdivision/Final Inspection/NA
Final Plat Subdivision	Development/Subdivision/Final Plat/NA
Major Subdivision	Development/Subdivision/Major/NA
Minor Subdivision	Development/Subdivision/Minor/NA
Unpaved Road	Development/Unpaved Roads/NA/NA
Vested Rights	Development/Vested Rights/NA/NA
Finish Floor Waiver	Development/Waivers/Finish Floor/NA
General Waiver	Development/Waivers/General/NA
Administrative Approval	Development/Zoning/Administrative Approval/NA
Alcohol Restaurant	Development/Zoning/Alcohol Restaurant/NA
Amendment - Binding Development Plan	Development/Zoning/Binding Development Plan Amend/NA
Binding Development Plan (BDP)	Development/Zoning/Binding Development Plan/NA
Combined Rezoning-Conditional Use Permit	Development/Zoning/Combined Rezoning-CUP/NA
Concurrency	Development/Zoning/Concurrency/NA
Conditional Use Permit (CUP)	Development/Zoning/CUP/NA
Development Feasibility	Development/Zoning/Development Feasibility/NA
Flag Lot or Easement	Development/Zoning/Flag Lot_Easement/NA
Comp Plan - Large Scale (LSCP)	Development/Zoning/LSCPA/NA
Zoning Miscellaneous	Development/Zoning/Miscellaneous/NA
Amendment - PUD Major	Development/Zoning/PUD Major/NA
Amendment - PUD Minor	Development/Zoning/PUD Minor/NA
Rezoning	Development/Zoning/Rezoning/NA
Comp Plan - Small Scale (SSCP)	Development/Zoning/SSCPA/NA
Variance	Development/Zoning/Variance/NA
Zoning Waiver	Development/Zoning/Waiver/NA
Verification Letter	Development/Zoning/Zoning Verification Letter/NA
Contractor Licensing Citation	Enforce/Citation/Licensing/NA

Housing Code Complaint	Enforce/Code Case/Building/NA
Code Enforcement Case	Enforce/Code Case/Code Enforcement/NA
Environmental Health Case	Enforce/Code Case/Environmental Health/NA
Fire Case	Enforce/Code Case/Fire/NA
Natural Resource Case	Enforce/Code Case/Natural Resources/NA
Contractor Licensing Complaint	Enforce/Contractor Licensing/Complaint/NA
NA	Enforce/Contractor Licensing/Notice of Violation/NA/Enforce/Contractor Licensing/Notice of Violation
Magistrate Audio	Enforce/Magistrate Audio/NA/NA
Burglar & Fire Alarm Contractor (E)	Licenses/Exam/Contractor/Alarm I
Burglar Alarm Contractor (E)	Licenses/Exam/Contractor/Alarm II
Building Contractor (E)	Licenses/Exam/Contractor/Building
Demolition Contractor (E)	Licenses/Exam/Contractor/Demolition
Drywall Contractor (E)	Licenses/Exam/Contractor/Drywall
Electrical Contractor (E)	Licenses/Exam/Contractor/Electrical
Electrical Sign Contractor (E)	Licenses/Exam/Contractor/Electrical Sign
Landclearing Contractor (E)	Licenses/Exam/Contractor/Excavating/Excavating
Fence Contractor (E)	Licenses/Exam/Contractor/Fence
Floor Covering Contractor (E)	Licenses/Exam/Contractor/Floor Covering
Floor Covering With Tile Contractor (E)	Licenses/Exam/Contractor/Floor Covering With Tile
Carpentry Contractor (E)	Licenses/Exam/Contractor/Framing/Framing
Garage Door Contractor (E)	Licenses/Exam/Contractor/Garage Door
General Contractor (E)	Licenses/Exam/Contractor/General
Air Conditioning Class B Contractor (E)	Licenses/Exam/Contractor/Harv Limited
Air Conditioning Class A Contractor (E)	Licenses/Exam/Contractor/Harv Unlimited
Sprinkler Contractor (E)	Licenses/Exam/Contractor/Irrigation/Irrigation
Limited Contractor (E)	Licenses/Exam/Contractor/Limited
Low Voltage Systems Contractor (E)	Licenses/Exam/Contractor/Limited Energy Systems/Limited Energy
Marine I Contractor (E)	Licenses/Exam/Contractor/Marine I
Marine II Contractor (E)	Licenses/Exam/Contractor/Marine II
Masonry Contractor (E)	Licenses/Exam/Contractor/Masonry
Mechanical Airconditioning Contractor (E)	Licenses/Exam/Contractor/Mechanical
Contractor Exam (E)	Licenses/Exam/Contractor/NA
Painting Contractor (E)	Licenses/Exam/Contractor/Painting
Plumbing Contractor (E)	Licenses/Exam/Contractor/Plumbing
Residential Contractor (E)	Licenses/Exam/Contractor/Residential

Roofing Contractor (E)	Licenses/Exam/Contractor/Roofing
Sheet Metal Contractor (E)	Licenses/Exam/Contractor/Sheet Metal
Solar Contractor (E)	Licenses/Exam/Contractor/Solar
Specialty Structure Aluminum Contractor (E)	Licenses/Exam/Contractor/Specialty Structure Aluminum
Storm Shutter Contractor (E)	Licenses/Exam/Contractor/Storm Shutter
Stucco Contractor (E)	Licenses/Exam/Contractor/Stucco
Swimming Pool Commercial Contractor (E)	Licenses/Exam/Contractor/Swimming Pool Commercial
Sub-Contractor (E)	Licenses/Exam/Contractor/Swimming Pool Finishing/Swimming Pool Finishing
Remodeling Contractor (E)	Licenses/Exam/Contractor/Swimming Pool Service/Swimming Pool Service
Underground Utility Contractor (E)	Licenses/Exam/Contractor/Underground Utility
Window And Door Contractor (E)	Licenses/Exam/Contractor/Window And Door
Journeyman Electrician (E)	Licenses/Exam/Journeyman/Electrician
Journeyman Airconditioning (E)	Licenses/Exam/Journeyman/Harv
NA	Licenses/Exam/Journeyman/NA/Licenses/Exam/Journeyman
Journeyman Plumber (E)	Licenses/Exam/Journeyman/Plumber
Journeyman Roofer (E)	Licenses/Exam/Journeyman/Roofer
Journeyman Sheet Metal (E)	Licenses/Exam/Journeyman/Sheet Metal
Master Electrician (E)	Licenses/Exam/Master/Electrician
NA	Licenses/Exam/Master/NA/Licenses/Exam/Master
Master Plumber (E)	Licenses/Exam/Master/Plumber
Demolition Contractor (G)	Licenses/Grandfathering/Contractor/Demolition
Landclearing Contractor (G)	Licenses/Grandfathering/Contractor/Excavating/Excavating
Fence Contractor (G)	Licenses/Grandfathering/Contractor/Fence
Floor Covering Contractor (G)	Licenses/Grandfathering/Contractor/Floor Covering
Floor Covering With Tile Contractor (G)	Licenses/Grandfathering/Contractor/Floor Covering With Tile
Carpentry Contractor (G)	Licenses/Grandfathering/Contractor/Framing/Framing
Garage Door Contractor (G)	Licenses/Grandfathering/Contractor/Garage Door
Sprinkler Contractor (G)	Licenses/Grandfathering/Contractor/Irrigation/Irrigation
Marine I Contractor (G)	Licenses/Grandfathering/Contractor/Marine I
Marine II Contractor (G)	Licenses/Grandfathering/Contractor/Marine II
Masonry Contractor (G)	Licenses/Grandfathering/Contractor/Masonry
Contractor (G)	Licenses/Grandfathering/Contractor/NA
Painting Contractor (G)	Licenses/Grandfathering/Contractor/Painting
Storm Shutter Contractor (G)	Licenses/Grandfathering/Contractor/Storm Shutter

Stucco Contractor (G)	Licenses/Grandfathering/Contractor/Stucco
Sub-Contractor (G)	Licenses/Grandfathering/Contractor/Swimming Pool Finishing/Swimming Pool Finishing
Window And Door Contractor (G)	Licenses/Grandfathering/Contractor/Window And Door
Burglar & Fire Alarm Contractor (R)	Licenses/Reciprocity/Contractor/Alarm I
Burglar Alarm Contractor (R)	Licenses/Reciprocity/Contractor/Alarm II
Building Contractor (R)	Licenses/Reciprocity/Contractor/Building
Demolition Contractor (R)	Licenses/Reciprocity/Contractor/Demolition
Drywall Contractor (R)	Licenses/Reciprocity/Contractor/Drywall
Electrical Contractor (R)	Licenses/Reciprocity/Contractor/Electrical
Electrical Sign Contractor (R)	Licenses/Reciprocity/Contractor/Electrical Sign
Landclearing Contractor (R)	Licenses/Reciprocity/Contractor/Excavating/Excavating
Fence Contractor (R)	Licenses/Reciprocity/Contractor/Fence
Floor Covering Contractor (R)	Licenses/Reciprocity/Contractor/Floor Covering
Floor Covering With Tile Contractor (R)	Licenses/Reciprocity/Contractor/Floor Covering With Tile
Carpentry Contractor (R)	Licenses/Reciprocity/Contractor/Framing/Framing
Garage Door Contractor (R)	Licenses/Reciprocity/Contractor/Garage Door
General Contractor (R)	Licenses/Reciprocity/Contractor/General
Air Conditioning Class B Contractor (R)	Licenses/Reciprocity/Contractor/Harv Limited
Air Conditioning Class A Contractor (R)	Licenses/Reciprocity/Contractor/Harv Unlimited
Sprinkler Contractor (R)	Licenses/Reciprocity/Contractor/Irrigation/Irrigation
Limited Contractor (R)	Licenses/Reciprocity/Contractor/Limited
Low Voltage Systems Contractor (R)	Licenses/Reciprocity/Contractor/Limited Energy Systems/Limited Energy
Marine I Contractor (R)	Licenses/Reciprocity/Contractor/Marine I
Marine II Contractor (R)	Licenses/Reciprocity/Contractor/Marine II
Masonry Contractor (R)	Licenses/Reciprocity/Contractor/Masonry
Mechanical Airconditioning Contractor (R)	Licenses/Reciprocity/Contractor/Mechanical
Painting Contractor (R)	Licenses/Reciprocity/Contractor/Painting
Plumbing Contractor (R)	Licenses/Reciprocity/Contractor/Plumbing
Residential Contractor (R)	Licenses/Reciprocity/Contractor/Residential
Roofing Contractor (R)	Licenses/Reciprocity/Contractor/Roofing
Sheet Metal Contractor (R)	Licenses/Reciprocity/Contractor/Sheet Metal
Solar Contractor (R)	Licenses/Reciprocity/Contractor/Solar
Specialty Structure Aluminum Contractor (R)	Licenses/Reciprocity/Contractor/Specialty Structure Aluminum
Storm Shutter Contractor (R)	Licenses/Reciprocity/Contractor/Storm Shutter
Stucco Contractor (R)	Licenses/Reciprocity/Contractor/Stucco

Swimming Pool Commercial Contractor (R)	Licenses/Reciprocity/Contractor/Swimming Pool Commercial
Sub-Contractor (R)	Licenses/Reciprocity/Contractor/Swimming Pool Finishing/Swimming Pool Finishing
Remodeling Contractor (R)	Licenses/Reciprocity/Contractor/Swimming Pool Service/Swimming Pool Service
Underground Utility Contractor (R)	Licenses/Reciprocity/Contractor/Underground Utility
Window And Door Contractor	Licenses/Reciprocity/Contractor/Window And Door
Journeyman Electrician (R)	Licenses/Reciprocity/Journeyman/Electrician
Journeyman Airconditioning (R)	Licenses/Reciprocity/Journeyman/Harv
Journeyman Plumber (R)	Licenses/Reciprocity/Journeyman/Plumber
Journeyman Roofer (R)	Licenses/Reciprocity/Journeyman/Roofer
Journeyman Sheet Metal (R)	Licenses/Reciprocity/Journeyman/Sheet Metal
Master Electrician (R)	Licenses/Reciprocity/Master/Electrician
Master Plumber (R)	Licenses/Reciprocity/Master/Plumber
Burglar & Fire Alarm Contractor (S)	Licenses/State/Contractor/Alarm I
Burglar Alarm Contractor (S)	Licenses/State/Contractor/Alarm II
Building Contractor (S)	Licenses/State/Contractor/Building
Demolition Contractor (S)	Licenses/State/Contractor/Demolition
Drywall Contractor (S)	Licenses/State/Contractor/Drywall
Electrical Contractor (S)	Licenses/State/Contractor/Electrical
Electrical Sign Contractor (S)	Licenses/State/Contractor/Electrical Sign
Exempt Contractor (S)	Licenses/State/Contractor/Exempt
Fire System Contractor (S)	Licenses/State/Contractor/Fire System
Franchise Utility Contractor (S)	Licenses/State/Contractor/Franchise Util
General Contractor (S)	Licenses/State/Contractor/General
Glass & Glazing Contractor (S)	Licenses/State/Contractor/Glass - Glazing
Air Conditioning Class B Contractor (S)	Licenses/State/Contractor/Harv Limited
Air Conditioning Class A Contractor (S)	Licenses/State/Contractor/Harv Unlimited
Irrigation Contractor (S)	Licenses/State/Contractor/Irrigation
Lighting Maintenance Specialty Contractor (S)	Licenses/State/Contractor/Lighting Maint Specialty
Low Voltage Systems Contractor (S)	Licenses/State/Contractor/Limited Energy Systems/Limited Energy
Liquid Petroleum Gas Contractor (S)	Licenses/State/Contractor/LP Gas
Marine I Contractor (S)	Licenses/State/Contractor/Marine I
Mechanical Air Conditioning Contractor (S)	Licenses/State/Contractor/Mechanical
Mobile Home Contractor (S)	Licenses/State/Contractor/Mobile Home
Owner Builder (S)	Licenses/State/Contractor/Owner Builder

Plumbing Contractor (S)	Licenses/State/Contractor/Plumbing
Pollutant Storage Contractor (S)	Licenses/State/Contractor/Pollutant Stor
Private Inspector (S)	Licenses/State/Contractor/Private Inspector
Private Reviewer (S)	Licenses/State/Contractor/Private Reviewer
Residential Contractor (S)	Licenses/State/Contractor/Residential
Residential Electrical Contractor (S)	Licenses/State/Contractor/Residential Elec
Roofing Contractor (S)	Licenses/State/Contractor/Roofing
Septic System Contractor (S)	Licenses/State/Contractor/Septic
Sheet Metal Contractor (S)	Licenses/State/Contractor/Sheet Metal
Solar Contractor (S)	Licenses/State/Contractor/Solar
Specialty Structure Aluminum Contractor (S)	Licenses/State/Contractor/Specialty Structure Aluminum
Swimming Pool Commercial Contractor (S)	Licenses/State/Contractor/Swimming Pool Commercial
Swimming Pool Residential Contractor (S)	Licenses/State/Contractor/Swimming Pool Res
Remodeling Contractor (S)	Licenses/State/Contractor/Swimming Pool Service/Swimming Pool Service
Tower Specialty Contractor (S)	Licenses/State/Contractor/Tower Specialty
Underground Utility Contractor (S)	Licenses/State/Contractor/Underground Utility
Sewer Leak	Utilities/Sewer Leak/NA/NA

Accela

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

Proposed by: Jeffrey Reese
Contact Phone:
Contact Email: jreese@accela.com
Quote ID: Q-35038
Valid Through: 12/31/2024
Currency: USD

Order Form

Address Information

Bill To:

Brevard County, FL BCC
2725 Judge Fran Jamieson Way,
Bldg. A-119
Viera, Florida 32940
United States

Billing Name: Joe Clanton
Billing Phone: (321) 617-7395 ext 52902
Billing Email: joe.clanton@bevardcounty.us

Ship To:

Brevard County, FL BCC
2725 Judge Fran Jamieson Way,
Bldg. A-119
Viera, Florida 32940
United States

Services	Year	Start Date	End Date	Term (Months)	Price	Qty	Net Total
Multi Solution User	Year 1	12/31/2024	12/30/2025	12	$1,730.00	245	$423,850.00
> Accela Building - SaaS	Year 1	12/31/2024	12/30/2025	12	$0.00	245	$0.00
> Accela Planning - SaaS	Year 1	12/31/2024	12/30/2025	12	$0.00	245	$0.00
Enhanced Reporting Database (ERD)	Year 1	12/31/2024	12/30/2025	12	$50,862.00	1	$50,862.00
Additional Data Storage (500GB per unit)	Year 1	12/31/2024	12/30/2025	12	$900.00	4	$3,600.00
						TOTAL:	$478,312.00

Services	Year	Start Date	End Date	Term (Months)	Price	Qty	Net Total
Multi Solution User	Year 2	12/31/2025	12/30/2026	12	$1,816.50	245	$445,042.50
> Accela Building - SaaS	Year 2	12/31/2025	12/30/2026	12	$0.00	245	$0.00
> Accela Planning - SaaS	Year 2	12/31/2025	12/30/2026	12	$0.00	245	$0.00
Enhanced Reporting Database (ERD)	Year 2	12/31/2025	12/30/2026	12	$53,405.10	1	$53,405.10
Additional Data Storage (500GB per unit)	Year 2	12/31/2025	12/30/2026	12	$945.00	4	$3,780.00
						TOTAL:	$502,227.60

Services	Year	Start Date	End Date	Term (Months)	Price	Qty	Net Total
Multi Solution User	Year 3	12/31/2026	12/30/2027	12	$1,907.32	245	$467,294.62

Services	Year	Start Date	End Date	Term (Months)	Price	Qty	Net Total
> Accela Building - SaaS	Year 3	12/31/2026	12/30/2027	12	$0.00	245	$0.00
> Accela Planning - SaaS	Year 3	12/31/2026	12/30/2027	12	$0.00	245	$0.00
Enhanced Reporting Database (ERD)	Year 3	12/31/2026	12/30/2027	12	$56,075.36	1	$56,075.36
Additional Data Storage (500GB per unit)	Year 3	12/31/2026	12/30/2027	12	$992.25	4	$3,969.00
						TOTAL:	$527,338.98

Services	Year	Start Date	End Date	Term (Months)	Price	Qty	Net Total
Multi Solution User	Year 4	12/31/2027	12/30/2028	12	$2,002.69	245	$490,659.36
> Accela Building - SaaS	Year 4	12/31/2027	12/30/2028	12	$0.00	245	$0.00
> Accela Planning - SaaS	Year 4	12/31/2027	12/30/2028	12	$0.00	245	$0.00
Enhanced Reporting Database (ERD)	Year 4	12/31/2027	12/30/2028	12	$58,879.12	1	$58,879.12
Additional Data Storage (500GB per unit)	Year 4	12/31/2027	12/30/2028	12	$1,041.86	4	$4,167.45
						TOTAL:	$553,705.93

Services	Year	Start Date	End Date	Term (Months)	Price	Qty	Net Total
Multi Solution User	Year 5	12/31/2028	12/30/2029	12	$2,102.83	245	$515,192.32
> Accela Building - SaaS	Year 5	12/31/2028	12/30/2029	12	$0.00	245	$0.00
> Accela Planning - SaaS	Year 5	12/31/2028	12/30/2029	12	$0.00	245	$0.00
Enhanced Reporting Database (ERD)	Year 5	12/31/2028	12/30/2029	12	$61,823.08	1	$61,823.08
Additional Data Storage (500GB per unit)	Year 5	12/31/2028	12/30/2029	12	$1,093.96	4	$4,375.82
						TOTAL:	$581,391.22

Pricing Summary

Period	Net Total
Year 1	$ 478,311.99
Year 2	$ 502,227.60
Year 3	$ 527,338.99
Year 4	$ 553,705.93
Year 5	$ 581,391.22
Total	**$ 2,642,975.73**

Additional Terms:

1. No additional or conflicting terms or conditions stated in Customer's order documentation, including purchase orders, will be incorporated into or form any part of this Order Form or the governing agreement, and all such terms or conditions will be null.

2. This Order Form, including any OnPrem Licenses, Maintenance and Support, and Subscription Services, Enhanced Reporting Database and Managed Application Services will be governed by the applicable terms and conditions. If those terms and conditions are non-existent, have expired, do not apply or have otherwise been terminated, the following terms at https://www.accela.com/terms/ will govern as applicable, based on the Customer's purchase.

3. All Software Licenses, Maintenance, and Subscription purchases are non-cancelable and non-refundable.

4. If Customer has a prior agreement with Accela, and this purchase is co-terming with that prior agreement, if the start date on this Order Form is before the actual delivery date of the purchase, Accela may pro-rate this purchase so that it can co-term with the prior agreement.

5. If this Order Form is executed and/or returned to Accela by Customer after the Order Start Date above, Accela may adjust the Order Start Date and Order End Date without increasing the total price based on the date Accela activates the products and provided that the total term length does not change.

6. Pricing is based upon payment by ACH or check. Payment by credit card (including Purchase Cards) for product and services in this Order Form will be subject to a service charge of 3%. There is no service charge for ACH or check payment.

7. If Customer has Enhanced Reporting Database, pricing will be based on a percentage of SaaS Annual Contract Value. As SaaS Annual Contract Value increases/decreases based on seat count changes or annual uplift ERD pricing will be adjusted accordingly at contract renewal.

Signatures

Accela, Inc.	Customer
Signature: Signed by: Michael E Gigliello 73688EE5EB274C8...	Signature: Frank Altieri
Print Name: Michael E Gigliello	Print Name:
Title: Controller	Title:
Date: 12/27/2024	Date: 12/31/24

ACCELA SUBSCRIPTION SERVICES AGREEMENT

This Accela Subscription Services Agreement (this "***Agreement***") is entered into as of the date of the applicable Order, as defined below, that incorporates these terms (the "***Effective Date***") by and between Accela, Inc. ("***Accela***") and the entity identified in such Order ("***Customer***" or "***County***").

1. DEFINITIONS.

1.1 "***Accela System***" means the information technology infrastructure used by or on behalf of Accela in performing the Subscriptions Services, including all computers, software (including but not limited to Accela Software), hardware, databases, electronic systems (including database management systems), and networks, whether operated directly by Accela or its third party suppliers.

1.2 "***Aggregate Data***" means data and information related to Customer's use of the Subscription Services, including anonymized analysis of all data processed in the Subscription Services, that is used by Accela in an aggregate and anonymized manner, including compiling statistical and performance information related to the provision and operation of the Services.

1.3 "***Authorized User***" means one named employee, contractor or agent of Customer (each identified by a unique email address) for whom Customer has purchased a subscription to the Subscription Services and who is authorized by Customer to access and use the Services under the rights granted to Customer pursuant to this Agreement.

1.4 "***Consulting Services***" means packaged or time and materials consulting, review, training or other services (but excluding Subscription and Support Services) delivered by Accela to Customer pursuant an Order. The current Consulting Services Policy is available at www.accela.com/terms/.

1.5 "***Customer Data***" means the content, materials, and data that Customer, Authorized Users, and External Users enter into the Subscription Services. Customer Data does not include any component of the Subscription Services, material provided by or on behalf of Accela, or Aggregate Data.

1.6 "***Documentation***" means the then-current technical and functional user documentation in any form made generally available by Accela for the Subscription Services.

1.7 "***External Users***" means third party users of the Subscription Services that access the public-facing interfaces of the Subscription Services to submit queries and requests to facilitate communications between such third party and Customer.

1.8 "***Intellectual Property Rights***" means any patent rights (including, without limitation, patent applications and disclosures), copyrights, trade secrets, know-how, and any other intellectual property rights, in all cases whether or not registered or registrable and recognized in any country or jurisdiction in the world.

1.9 "***Order***" means an Accela order form or other mutually acceptable document fully executed between Customer and Accela that incorporates this Agreement.

1.10 "***Service Availability Policy***" means the Service Availability and Security Policy located at www.accela.com/terms/.

1.11 "***Subscription Services***" means the civic administration services, comprised of the Accela System, Software, and Support Services, to which Customer may license access to in accordance with the terms herein.

1.12 "***Software***" means any licensed software (including client software for Authorized Users' devices) and Documentation that Accela uses or makes available as part of the Subscription Services.

1.13 ***"Support Services"*** means those technical and help services provided by Accela in accordance with the Software Support Services Policies (SaaS) located at www.accela.com/terms/.

1.14 ***"Subscription Period"*** means the duration of Customer's authorized use of the Subscription Services as designated in the Order.

2. USAGE AND ACCESS RIGHTS.

2.1 Right to Access. Subject to the terms and conditions of this Agreement, Accela hereby grants to Customer a limited, non-exclusive, non-transferable right and license during the Subscription Period, to permit: (i) Authorized Users to access and use the internal and administrative interfaces of the Subscription Services in accordance with the Documentation to support Customer's internal business purposes and (ii) its External Users the ability to access and use the publicly available interfaces to submit requests and information to Customer. Each instance of the Subscription Service shall be provisioned with the amount of storage set forth in the Order and additional storage may be purchased at the then-current rates.

2.2 Support Services & Service Availability. During the Subscription Period, Accela shall provide to Customer the Support Services specified in the Order and shall make all commercially reasonable efforts to attain the service levels specified in the applicable policies. The remedies set forth in the Support Services and Service Availability Policy are the sole and exclusive remedies for any breach of the service levels. Customer grants Accela a royalty-free, worldwide, transferable, sub- licensable, irrevocable, perpetual license to use or incorporate into its software or services any suggestions or other feedback provided by Customer or Authorized Users relating to the operation or features of the Subscription Services.

2.3 Purchasing Consulting Services. Customer may purchase Consulting Services from Accela by executing an Order for such services. All prices are exclusive of travel and expenses, which will be invoiced at actual cost, without markup, and will comply with the Consulting Services Policy located at www.accela.com/terms/ or as otherwise agreed in the applicable Order. If applicable, one Consulting Services day shall be equal to eight (8) hours.

2.4 Restrictions on Use. Customer shall not, and shall not permit others to: (i) use or access the Subscription Services in any manner except as expressly permitted by the Agreement, including but not limited to, in a manner that circumvents contractual usage restrictions set forth in this Agreement; (ii) license, sub-license, sell, re-sell, rent, lease, transfer, distribute, time share or otherwise make any portion of the Subscription Services available for access by third parties except as otherwise expressly provided herein; (iii) use the Subscription Service in a way that: (a) violates or infringes upon the rights of a third party; or (b) stores or transmits libelous, tortious, or otherwise unlawful material or malicious code or viruses; (iv) create derivative works, reverse engineer, decompile, disassemble, copy, or otherwise attempt to derive source code or other trade secrets from or about any of the Subscription Services (except to and only to the extent such rights are proscribed by law); (v) interfere with or disrupt the security, integrity, operation, or performance of the Subscription Services; (vi) access, use, or provide access or use to the Subscription Services or Documentation for the purposes of competitive analysis or the development, provision, or use of a competing software, SaaS or product or any other purpose that is to Accela's detriment or commercial disadvantage; (vii) provide access to the Subscription Services to competitors of Accela; (viii) access or use components of the Subscription Service not licensed by Customer; (ix) use or allow the use of the Subscription Services by anyone located in, under the control of, or that is a national or resident of a U.S. embargoed country or territory or by a prohibited end user under Export Control Laws (as defined in Section 12.3, Compliance with Laws); (x) remove, delete, alter or obscure any trademarks, Documentation, warranties, or disclaimers, or any copyright, trademark, patent or other intellectual property or proprietary rights notices from any Subscription Services; or (xi) access or use the Subscription Services in, or in association with, the design, construction, maintenance, or operation of any hazardous environments, systems or applications, any safety response systems or other safety-critical applications, or any other use or application in which the use or failure of the Subscription Services could lead to personal injury or severe physical or property damage.

2.5 Ownership. Accela retains all Intellectual Property Rights, including all rights, title and license to the Subscription Service, Software, Accela System, Support Services, Consulting Services, and Aggregate Data, any related work product of the foregoing and all derivative works thereof by whomever produced; provided however, that to the extent such materials are delivered to Customer as part of the Subscription Services, Consulting Services or Support Services then Customer shall receive a limited license consistent with the terms of Section 2 to use such materials during the Subscription Period.

2.6 Customer's Responsibilities. Customer will: (i) be responsible for meeting Accela's applicable minimum system requirements for use of the Subscription Services set forth in the Documentation; (ii) be responsible for Authorized Users' compliance with this Agreement and for any other activity (whether or not authorized by Customer) occurring under Customer's account; (iii) be solely responsible for the accuracy, quality, integrity and legality of Customer Data; (iv) use commercially reasonable efforts to prevent unauthorized access to or use of the Subscription Services and Customer Data under its account, and notify Accela promptly of any such unauthorized access or use, and; (v) use the Subscription Services only in accordance with the applicable Documentation, laws and government regulations.

3. **PAYMENT TERMS.**

3.1 Purchases Directly from Accela. Except as otherwise set forth in an Order, Subscription fees shall be invoiced annually in advance and such fees shall be due and payable on the first day of the Subscription and on each anniversary thereafter for each renewal, if any. All other invoices shall be due and payable net thirty (30) from the date of the applicable invoice. All amounts payable to Accela under this Agreement shall be paid by Customer in full without any setoff, deduction, debit, or withholding for any reason. Any late payments shall be subject to an additional charge of the lesser of 1.5% per month or the maximum permitted by law. All Subscription Services fees are exclusive of any taxes, levies, duties, withholding or similar governmental assessments of any nature (collectively, "***Taxes***"). If any such Taxes are owed or payable for such transactions, they shall be paid separately by Customer without set-off to the fees due Accela.

3.2 Purchases from Authorized Resellers. In the event that Customer has purchased any products or services through a reseller, subject to these terms, any separate payment arrangements and terms shall be exclusively through such reseller and Accela is not a party to such transactions. Accela's sole obligations are set forth herein and Customer acknowledges that its rights hereunder may be terminated for non-payment to such third party.

4. **CONFIDENTIALITY.** As used herein, "***Confidential Information***" means all confidential information disclosed by a one party to this Agreement to the other party of this Agreement whether orally or in writing, that is designated as confidential or that reasonably should be understood to be confidential given the nature of the information and the circumstances of disclosure. However, Confidential Information will not include any information that: (i) is or becomes generally known to the public without breach of any obligation owed to the disclosing party; (ii) was known to the receiving party prior to its disclosure without breach of any obligation owed to the disclosing party; (iii) is received without restriction from a third party without breach of any obligation owed to the disclosing party; or (iv) was independently developed by the receiving party. Each party will use the same degree of care that it uses to protect the confidentiality of its own confidential information of like kind (but in no event less than reasonable care) not to disclose or use any Confidential Information except as permitted herein, and will limit access to Confidential Information to those of its employees, contractors and agents who need such access for purposes consistent with this Agreement and who are bound to protect such Confidential Information consistent with this Agreement. The receiving party may disclose Confidential Information if it is compelled by law to do so, provided the receiving party gives the disclosing party prior notice of such compelled disclosure (to the extent legally permitted) and reasonable assistance, at the disclosing party's request and cost, to contest, limit, or protect the disclosure.

Accela

5. **CUSTOMER DATA.**

5.1 Ownership. Customer reserves all its rights, title, and interest in and to the Customer Data. No rights are granted to Accela hereunder with respect to the Customer Data, except as otherwise set forth explicitly in Section 5.

5.2 Usage. Customer shall be responsible for Customer Data as entered in to, applied or used in the Subscription Services. Customer acknowledges that Accela generally does not have access to and cannot retrieve lost Customer Data. Customer grants to Accela the non-exclusive right to process Customer Data (including personal data) for the sole purpose of and only to the extent necessary for Accela: (i) to provide the Subscription Services; (ii) to verify Customer's compliance with the restrictions set forth in Section 2.4 (Restrictions on Use) if Accela has a reasonable belief of Customer's non-compliance; and (iii) as otherwise set forth in this Agreement. Accela may utilize the information concerning Customer's use of the Subscription Services (excluding any use of Customer's Confidential Information) to improve Subscription Services, to provide Customer with reports on its use of the Subscription Services, and to compile aggregate statistics and usage patterns by customers using the Subscription Services.

5.3 Use of Aggregate Data. Customer agrees that Accela may collect, use and disclose Aggregate Data derived from the use of the Subscription Services for industry analysis, benchmarking, analytics, marketing and other business purposes. All Aggregate Data collected, used and disclosed will be in aggregate form only and will not identify Customer, its Authorized Users or any third parties utilizing the Subscription Services.

6. **WARRANTIES AND DISCLAIMERS.**

6.1 Subscription Services Warranty. During the Subscription Period, Accela warrants that Subscription Services shall perform materially in accordance with the applicable Documentation. As Customer's sole and exclusive remedy and Accela's entire liability for any breach of the foregoing warranty, Accela will use commercially reasonable efforts to: (a) repair the Subscription Services in question; (b) replace the Subscription Services in question with those of substantially similar functionality; or (c), after making all commercially reasonable attempts to do the foregoing, terminate the applicable Subscription Services and refund all unused, prepaid fees paid by Customer for such non-compliant Subscription Services.

6.2 Consulting Services Warranty. For ninety (90) days from the applicable delivery, Accela warrants that Consulting Services shall be performed in a professional and workmanlike manner. As Customer's sole and exclusive remedy and Accela's entire liability for any breach of the foregoing warranty, Accela will use commercially reasonable efforts to (a) re-perform the Consulting Services in a compliant manner; or, after making all commercially reasonable attempts to do the foregoing, (b) refund the fees paid for the non-compliant Consulting Services.

6.3. Disclaimers. EXCEPT AS EXPRESSLY PROVIDED HEREIN, ACCELA MAKES NO WARRANTY OF ANY KIND, WHETHER EXPRESS, IMPLIED, STATUTORY OR OTHERWISE, AND SPECIFICALLY DISCLAIMS ALL IMPLIED WARRANTIES, INCLUDING ANY IMPLIED WARRANTY OF MERCHANTABILITY, SECURITY, FITNESS FOR A PARTICULAR PURPOSE OR NON-INFRINGEMENT, TO THE MAXIMUM EXTENT PERMITTED BY APPLICABLE LAW.

6.4. Cannabis-Related Activities. If Customer purchases any Subscription Services for use with any cannabis-related activities, the following additional disclaimers shall apply: Accela is considered a software service provider to its customers and not a cannabis related business or agent thereof. In addition to the foregoing, Accela only retains Subscription Services fees of this Agreement from its Customer for general software services, a state or local government agency, and does not retain these fees from any type of External Users. It is the sole responsibility of the Customer to offer state law compliant services, which may be coordinated and facilitated through the use of the Subscription Services. Accela makes no representations, promises, or warranties with respect to the legality, suitability, or otherwise regarding any third party provider, including partners, and have no responsibility or liability with respect to services provided to Customer by such third parties.

7. **INDEMNIFICATION.** Accela will defend (or at Accela's option, settle) any third party claim, suit or action brought against Customer to the extent that it is based upon a claim that the Subscription Services, as furnished by Accela hereunder, infringes or misappropriates the Intellectual Property Rights of any third party, and will pay any costs, damages and reasonable attorneys' fees attributable to such claim that are finally awarded against Customer, provided that Customer provides: (a) Accela notice of such claim as soon practical and in no event later than would reasonably permit Accela to respond to such claim, (b) reasonable cooperation to Accela, at Accela's expense, in the defense and/or settlement of such claim and (c) Accela the sole and exclusive control of the defense, litigation and settlement of such claim. In the event that Accela reasonably believes, in its sole discretion, that such claim may prevail or that the usage of the Subscription Services may be joined, Accela may seek to: (a) modify the Subscription Services such that it will be non-infringing (provided such modification does not materially reduce the functionality or performance of Customer's installed instance); (b) replace the Subscription Services with a service that is non-infringing and provides substantially similar functionality and performance; or, if the first two options are not commercially practicable, (c) terminate the remainder of the Subscription Period and refund any, pre-paid, unused fees received by Accela. Accela will have no liability under this Section 7 to the extent any claims arise from (i) any combination of the Subscription Services with products, services, methods of a third party; (ii) a modification of the Subscription Services that were either implemented by anyone other than Accela or implemented by Accela in accordance with Customer specifications; (iii) any use of the Subscription Services in a manner that violates this Agreement or the instructions given to Customer by Accela; (iv) a version of the Subscription Services other than the current, fully patched version, provided such updated version would have avoided the infringement; or (v) Customer's breach of this Agreement. THIS SECTION 7 STATES THE ENTIRE OBLIGATION OF ACCELA AND ITS LICENSORS WITH RESPECT TO ANY ALLEGED OR ACTUAL INFRINGEMENT OR MISAPPROPRIATION OF INTELLECTUAL PROPERTY RIGHTS RELATED TO THIS AGREEMENT.

8. **LIMITATION OF LIABILITY.** EXCEPT FOR LIABILITY ARISING OUT OF EITHER PARTY'S LIABILITY FOR DEATH OR PERSONAL INJURY OR CUSTOMER'S BREACH OF SECTION 2, NEITHER PARTY'S AGGREGATE LIABILITY FOR DAMAGES ARISING OUT OF OR IN CONNECTION WITH THIS AGREEMENT OR FROM THE USE OF OR INABILITY TO USE THE SERVICE, WHETHER IN CONTRACT, TORT OR UNDER ANY OTHER THEORY OF LIABILITY, SHALL EXCEED THE TOTAL AMOUNT PAID BY CUSTOMER HEREUNDER IN THE TWELVE (12) MONTH PERIOD IMMEDIATELY PRECEDING THE INCIDENT. EXCEPT FOR LIABILITY ARISING OUT OF CUSTOMER'S BREACH OF SECTION 2 OR EITHER PARTY'S LIABILITY FOR DEATH OR PERSONAL INJURY, IN NO EVENT SHALL EITHER PARTY OR ANY OTHER PERSON OR ENTITY INVOLVED IN CREATING, PRODUCING OR DELIVERING THE SERVICE BE LIABLE FOR ANY INCIDENTAL, SPECIAL, EXEMPLARY OR CONSEQUENTIAL DAMAGES, INCLUDING LOST PROFITS, LOSS OF DATA OR LOSS OF GOODWILL, SERVICE INTERRUPTION, COMPUTER DAMAGE OR SYSTEM FAILURE OR THE COST OF SUBSTITUTE PRODUCTS OR SERVICES, ARISING OUT OF OR IN CONNECTION WITH THIS AGREEMENT OR FROM THE USE OF OR INABILITY TO USE THE SUBSCRIPTION SERVICES, WHETHER BASED ON WARRANTY, CONTRACT, TORT (INCLUDING NEGLIGENCE), PRODUCT LIABILITY OR ANY OTHER LEGAL THEORY. THE FOREGOING EXCLUSIONS APPLY WHETHER OR NOT A PARTY HAS BEEN INFORMED OF THE POSSIBILITY OF SUCH DAMAGE, AND EVEN IF A LIMITED REMEDY SET FORTH HEREIN IS FOUND TO HAVE FAILED OF ITS ESSENTIAL PURPOSE.

9. **SECURITY.** Accela has implemented commercially viable and reasonable information security processes, policies and technology safeguards to protect the confidentiality and integrity of Customer Data, personal data protect against reasonably anticipated threats. Customer acknowledges that, notwithstanding security features of the Subscription Services, no product, hardware, software or service can provide a completely secure mechanism of electronic transmission or communication and that there are persons and entities, including enterprises, governments and quasi- governmental actors, as well as technologies, that may attempt to breach any electronic security measure. Subject only to its limited warranty obligations set forth in Section 6, Accela will have no liability for any such security breach. Customer further acknowledges that the Subscription Services is not guaranteed to operate without interruptions, failures, or errors. If Customer or Authorized Users use the Subscription Services in any application or environment where failure could cause personal injury, loss of life, or other substantial harm, Customer assumes any associated risks.

10. **THIRD PARTY SERVICES.** Customer may choose to obtain a product or service from a third party that is not directly produced by Accela as a component of the Subscription Services (***"Third Party Services"***) and this may include third party products resold by Accela. Accela assumes no responsibility for, and specifically disclaims any liability, warranty or obligation with respect to, any Third-Party Service or the performance of the Subscription Services (including Accela's service level commitment) when the Subscription Services are used in combination with or integrated with Third Party Services.

11. **TERM AND TERMINATION.**

11.1 Agreement Term. This Agreement shall become effective on the Effective Date and shall continue in full force and effect until the expiration of any Subscription Periods set forth in an applicable Order governed by the Agreement.

11.2 Subscription Periods & Renewals. Subscription Periods begin as specified in the applicable Order and, unless terminated earlier in accordance with this Agreement, continue for the term specified therein. Except as otherwise specified in the applicable Order, (a) all Subscription Services will automatically renew for additional Subscription Periods equal to the expiring Subscription Period, unless either party gives the other at least sixty (60) days' notice of non-renewal before the end of the relevant Subscription Period and (b), Orders may only be cancelled or terminated early in accordance with Section 11.3. Subscription Services renewals may be subject to an annual increase, for which Accela shall provide Customer notice prior to the renewal of the Subscription Period. In the event of any non-renewal or other termination, Customer's right to use the Subscription Services will terminate at the end of the relevant Subscription Period.

11.3 Termination or Suspension for Cause. A party may terminate this Agreement and Subscription Services license granted hereunder for cause upon thirty (30) days' written notice to the other party of a material breach if such breach remains uncured at the expiration of such thirty (30) day period. Either party may terminate immediately if the other party files for bankruptcy or becomes insolvent. Accela may, at its sole option, suspend Customer's or any Authorized User's access to the Subscription Services, or any portion thereof, immediately if Accela: (i) suspects that any person other than Customer or an Authorized User is using or attempting to use Customer Data; (ii) suspects that Customer or an Authorized User is using the Subscription Services in a way that violates this Agreement and could expose Accela or any other entity to harm or legal liability; (iii) is or reasonably believes it is required to do so by law or court order or; (iv) Customer's payment obligations are more than ninety (90) days past due, provided that Accela has provided at least thirty (30) days' notice of such suspension for delinquent payment. Should Customer terminate this Agreement for cause, Accela will refund a pro-rata portion of unused, pre-paid fees.

11.4 Effect of Termination. If this Agreement expires or is terminated for any reason: (i) within thirty (30) calendar days following the end of Customer's final Subscription Period, upon Customer's request Accela provided Customer Data and associated documents in a database dump file; provided that Customer pays (a) all costs of and associated with such copying, as calculated at Accela's then-current time-and-materials rates, and (b) any and all unpaid amounts due to Accela; (ii) licenses and use rights granted to Customer with respect to Subscription Services and intellectual property will immediately terminate; and (iii) Accela's obligation to provide any further services to Customer under this Agreement will immediately terminate, except as mutually agreed between the parties. If the Subscription Services are nearing expiration date or are otherwise terminated, Accela will initiate its data retention processes, including the deletion of Customer Data from systems directly controlled by Accela. Accela's current Data Storage Policy can be accessed www.accela.com/terms/.

11.5 Survival. Sections 2.5 (Ownership and Proprietary Rights), 4 (Confidentiality), 6.3 (Disclaimer), 8 (Limitation of Liability), 11.4 (Effect of Termination), 11.5 (Surviving Provisions), and 12 (General Provisions) will survive any termination or expiration of this Agreement.

12. **GENERAL.**

12.1 Notice. Except as otherwise specified in this Agreement, all notices, permissions and approvals hereunder will be in writing and will be deemed to have been given upon: (i) personal delivery; (ii) three days after sending registered, return receipt requested, post or; (iii) one day after sending by commercial overnight carrier. Notices will be sent to the address specified by the recipient in writing when entering into this Agreement or establishing Customer's account for the Subscription Services.

12.3 Compliance with Laws. Each party will comply with all applicable laws and regulations with respect to its activities under this Agreement including, but not limited to, export laws and regulations of the United States and other applicable jurisdictions. Further, in connection with the services performed under this Agreement and Customer's use of the Subscription Services, the parties agree to comply with all applicable anti-corruption and anti-bribery laws, statutes and regulations.

12.4 Assignment. Customer may not assign or transfer this Agreement, whether by operation of law or otherwise, without the prior written consent of Accela, which shall not be unreasonably withheld. Any attempted assignment or transfer, without such consent, will be null and void. Subject to the foregoing, this Agreement will bind and inure to the benefit of the parties, their respective successors and permitted assigns.

12.5 Publicity. Notwithstanding anything to the contrary, each party will have the right to publicly announce the existence of the business relationship between parties without disclosing the specific terms of the Agreement.

12.6 Miscellaneous. No failure or delay by either party in exercising any right under this Agreement will constitute a waiver of that right. Other than as expressly stated herein, the remedies provided herein are in addition to, and not exclusive of, any other remedies of a party at law or in equity. If any provision of this Agreement is held by a court of competent jurisdiction to be contrary to law, the provision will be modified by the court and interpreted so as best to accomplish the objectives of the original provision to the fullest extent permitted by law, and the remaining provisions of this Agreement will remain in effect. Accela will not be liable for any delay or failure to perform under this Agreement to the extent such delay or failure results from circumstances or causes beyond the reasonable control of Accela. This Agreement does not create a partnership, franchise, joint venture, agency, fiduciary or similar relationship between the parties. This Agreement, including any attachments hereto as mutually agreed upon by the parties, constitute the entire agreement between the parties concerning its subject matter and it supersedes all prior communications, agreements, proposals or representations, written or oral, concerning its subject matter. No modification, amendment, or waiver of any provision of this Agreement will be effective unless in writing and signed by a duly authorized representative of each party against whom the modification, amendment or waiver is to be asserted. Notwithstanding any language to the contrary therein, no terms or conditions stated in a Customer's purchase order or other order documentation will be incorporated into or form any part of this Agreement, and all such terms or conditions shall be null and void unless such term is to refer and agree to this Agreement.

13. Additional Terms

I. EMPLOYMENT ELIGIBILITY VERIFICATION (E-Verify).

a. ACCELA, INC. shall utilize the U.S. Department of Homeland Security's E-Verify system to verify the employment eligibility of all new employees hired by ACCELA, INC. during the term of the Agreement. Upon request, ACCELA, INC. shall provide acceptable evidence of their enrollment at the time of the submission of the ACCELA, INC.'s bid. Acceptable evidence may include, but not be limited to, a copy of the fully executed E-Verify Memorandum of Understanding for the business.

b. ACCELA, INC. shall expressly request any subcontractors providing Subscription Services pursuant to this Agreement to likewise utilize the U.S. Department of Homeland Security's E-

Verify system to verify the employment eligibility of all new employees hired by the subcontractors during the term of this Agreement.

c. ACCELA, INC. agrees to maintain non-security related records of its participation and compliance with the provisions of the E-Verify program, including requesting participation by its subcontractors as provided above, and to make such Accela records available to the COUNTY consistent with the terms of ACCELA, INC.'s enrollment in the program. This includes maintaining a copy of proof of ACCELA, INC.'s and requesting any subcontractors' enrollment in the E-Verify Program.

d. Compliance with the terms of this section I is made an express condition of this Agreement and the COUNTY may treat a failure to comply as a material breach of this Agreement.

e. A contractor who registers with and participates in the E-Verify program may not be barred or penalized under this section if, as a result of receiving inaccurate verification information from the E-Verify program, the contractor hires or employs a person who is not eligible for employment.

f. Nothing in this section may be construed to allow intentional discrimination of any class protected by law.

g. COUNTY will not intentionally award a publicly-funded Agreement to any contractor who knowingly employs unauthorized alien workers, constituting a violation of the employment provisions contained in 8 United States Code (USC) section 1324a(e)(section 274A(e) of the Immigration and Nationality Act (INA). The COUNTY shall consider ACCELA, INC.'s intentional employment of unauthorized aliens as grounds for immediate termination of this Agreement.

II. **SCRUTINIZED COMPANIES.**

a. ACCELA, INC. certifies that it, and it believes its subcontractors are not, on the Scrutinized Companies that Boycott Israel List. Pursuant to Section 287.135, Florida Statutes, the COUNTY may immediately terminate this Agreement at its sole option if ACCELA, INC. is found to have submitted a false certification; or if ACCELA, INC., is placed on the Scrutinized Companies that Boycott Israel List or is engaged in a boycott of Israel during the term of this Agreement. If an Accela subcontractor is found to be on the Scrutinized Companies that Boycott Israel List, or have submitted false certification, or is placed on the Scrutinized Companies that Boycott Israel List, or is engaged in a boycott of Israel during the term of this Agreement, Accela may have to cease allowing that subcontractor to provide Subscription Services to County.

b. If this Agreement is for more than one million dollars, ACCELA, INC. further certifies that it, and it believes that its subcontractors are also not, on the Scrutinized Companies, with Activities in Sudan, Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List as identified in Section 287.135, Florida Statutes.

c. Pursuant to Section 287.135, Florida Statutes, the COUNTY may immediately terminate this Agreement at its sole option if ACCELA, INC., its affiliates, are found to have submitted a false certification; or if ACCELA, INC., its affiliates, are placed on the Scrutinized Companies that Boycott the Scrutinized Companies with Activities in Sudan List or Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List during the term of the Agreement. If an Accela subcontractor is found to have submitted false certification, or is placed on the Scrutinized Companies that Boycott the Scrutinized Companies with Activities in Sudan List or Scrutinized Companies with Activities in Iran Petroleum Energy Sector List during the term of the Agreement, Accela may have to cease allowing that subcontractor to provide Subscription Services to County.

d. ACCELA, INC. agrees to observe the above requirements for applicable subcontractors entered into for the performance of work under this Agreement.

e. As provided in Subsection 287.135(8), Florida Statutes, if federal law ceases to authorize these contracting prohibitions, this section shall become inoperative and unenforceable.

III. FOREIGN INFLUENCE ON AGREEMENTS.

If this Agreement has a value of $100,000.00 or more, ACCELA, INC. shall complete the COUNTY's Foreign Disclosure Form and file any required disclosures with the State of Florida as required pursuant to section 286.101, Florida Statutes.

IV. AUDIT RIGHTS/PUBLIC RECORDS.

a. In performance of this Agreement, ACCELA, INC. shall keep non-security related books, records, and accounts of all activities related to this AGREEMENT in compliance with generally accepted accounting procedures.

b. Both Parties understand that COUNTY is subject to the Florida Public Records Law, Chapter 119, Florida Statutes. ACCELA, INC. agrees and understands that Florida has broad public records disclosure laws, and that any written communication with ACCELA, INC. , to include emails, email addresses, a copy of this Agreement, and any supporting documentation are subject to public disclosure upon request, unless otherwise exempt or confidential under Florida Statute.

c. ACCELA, INC. shall ensure that public records which are exempt or confidential and exempt from public records disclosure requirements are not disclosed, except as authorized by law, for the duration of the Agreement and following termination of the Agreement if ACCELA, INC. does not transfer the records to COUNTY.

d. Pursuant to Section 119.0701, Florida Statutes, a request to inspect or copy public records relating to this Agreement must be made directly to the COUNTY. ACCELA, INC. shall direct individuals requesting public records to the public records custodian listed below. If the COUNTY does not possess the requested records, the COUNTY shall immediately notify ACCELA, INC. of the request and if ACCELA, INC. possesses the records, ACCELA, INC. must provide the records to COUNTY or allow the records to be inspected or copied within twenty-four (24) hours (not including weekends and legal holidays) of the request so the COUNTY can comply with the requirements of section 119.07, Florida Statutes. ACCELA, INC. may also provide a cost estimate

to produce the requested documents consistent with the policy set forth in Brevard COUNTY Administrative Order AO-47, incorporated by this reference. A copy of AO-47 is available upon request from the COUNTY's public records custodian designated below.

e. Upon completion of the Agreement, ACCELA, INC. shall transfer, at no cost to the COUNTY, all non-security related public records in possession of ACCELA, INC. or keep and maintain public records required by the COUNTY to perform the service. If ACCELA, INC. transfers all public records to the COUNTY upon completion of the Agreement, ACCELA, INC. shall destroy any duplicate public records that are exempt or confidential and exempt from public records disclosure requirements. If ACCELA, INC. keeps and maintains public records upon completion of the Agreement, ACCELA, INC. shall meet all applicable requirements for retaining public records. All records stored electronically must be provided to the COUNTY, upon request from the COUNTY's custodian of public records, in a format that is compatible with the information technology systems of the COUNTY.

IF ACCELA, INC. HAS QUESTIONS REGARDING THE APPLICATION OF CHAPTER 119, FLORIDA STATUTES, TO ACCELA, INC. 'S DUTY TO PROVIDE PUBLIC RECORDS RELATING TO THIS AGREEMENT, CONTACT THE CUSTODIAN OF PUBLIC RECORDS C/O MISTY SHIRAH, 2725 JUDGE FRAN JAMIESON WAY #A114, VIERA, FLORIDA 32940, (321)-350-9228, MISTY.SHIRAH@BREVARDFL.GOV.

V. ATTORNEY'S FEES

In the event of any legal action to enforce the terms of this Agreement/Contract, each party shall bear its own attorney's fees and costs.

VI. VENUE AND WAIVER OF JURY TRIAL

The venue for any legal action by any party to this Agreement to interpret, construe or enforce this Agreement shall be in a court of competent jurisdiction in and for Brevard County, Florida. The parties agree they waive and give up their rights to have any dispute arising out of or regarding this Agreement/Contract decided by a jury. **Any trial between the parties will be a non-jury trial.**

VII. GOVERNING LAW

This Agreement, regardless of where executed, shall be governed by and construed according to the laws of the State of Florida.

VIII. SOVEREIGN IMMUNITY.

The COUNTY's indemnity and liability obligations hereunder shall be subject to the COUNTY's right of sovereign immunity and limited to the extent of the protections of and limitations on damages as set forth in Section 768.28, Florida Statutes. Nothing in this Agreement is intended to inure to the benefit of any third party for the purpose of allowing any claim which would otherwise be barred under the doctrine of sovereign immunity or by operation of law. Nothing herein shall constitute a waiver of the COUNTY's sovereign immunity. The Parties acknowledge specific consideration has been exchanged for this provision.

Accela

IX. Brevard County intends to utilize Accela SaaS as an electronic record keeping system for Brevard County records, and such records will be subject to meeting Florida Law including, but not limited to, Section 119.01, Florida Statutes.

In WITNESS WHERE OF, the parties have indicated their acceptance of the terms of this Agreement by their signatures below.

ACCELA, INC.		**CUSTOMER:**	
Signature:	Signed by: Michael E Gigliello 73688EE5EB274C8...	Signature:	Frank Abbate
Name:	Michael E Gigliello	Name:	
Title:	Controller	Title:	
Date:	12/31/2024	Date:	12/31/24