



Razavi Application Developers, Inc.
1050 17th Street, NW, Suite 600
Washington, DC 20036
(202) 470-4816
info@razavi.com
www.razavi.com

Accela Implementation Statement of Work

Prepared for:
City of Foley, Alabama

Prepared by:
Razavi Application Developers, Inc.
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Statement of Work – Land Management Deluxe Package Implementation

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OVERVIEW

Congratulations on your selection of Accela, Inc., and their enterprise suite of industry leading software. This proposed implementation by Razavi Application Developers, Inc. (Razavi) of the Accela products is designed specifically to meet the requirements and budget defined by City of Foley (“Agency”). Razavi is proposing to utilize the Accela Best Practice Template Configuration Implementation Methodology, to promote a successful project that will meet the Agency’s objectives. The following Statement of Work will detail how Razavi will implement the software, including the major milestones and deliverables that will ensure your success.

Razavi is committed to providing a superior solution and deployment of the Civic Platform, for the current and future needs of City of Foley. Razavi will work with Agency staff to optimize Accela’s portfolio of software, best practices, and customer experience to enable the Agency to successfully deploy the Civic Platform software in the Civic Cloud and meet its functionality, timing and cost requirements. This Statement of Work (“SOW”) sets forth a scope and definition of the consulting/professional services, work and/or project (collectively, the “Services”) to be provided by Razavi to City of Foley.

SERVICES DESCRIPTION

PURPOSE

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

PROJECT TIMELINE

The term of this project is 5 months.

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

Assuming that the contract is awarded on March 20, 2017, the project can get started by April 10, 2017. All meetings and trainings are online since there is no travel cost included in this budget. The following table provides an estimated project schedule.

Item	Milestone	Completion Date
1	Project kickoff meeting	April 10, 2017
2	Land Management Implementation	June 30, 2017
3	Land Management Rollout (go live)	July 14, 2017
4	Licensing Implementation	July 28, 2017
5	Licensing Data Conversion	August 11, 2017
6	Licensing Rollout (go live)	August 25, 2017

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

PROJECT MANAGEMENT

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

CRITICAL SUCCESS FACTORS

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

- **Knowledge Transfer** – City of Foley staff can maximize their Accela learning experience through the online tutorials and course guides available through the Accela Success Community website. This self-directed learning approach will provide City of Foley staff with the needed knowledge to advise Razavi what configuration changes are needed during project implementation.

While we cannot guarantee specific expertise for Agency staff as a result of participating in the project, Razavi will make all reasonable efforts to transfer knowledge to the Agency. It is critical that Agency personnel work with Razavi in order to schedule all work in the best manner to facilitate knowledge transfer and resource availability.

- **Dedicated Agency Participation** – We fully understand that Agency staff members have daily responsibilities that will compete with the amount of time that can be dedicated to the implementation project. However, it is critical that the Agency acknowledges that its staff must be actively involved throughout the entire duration of Services as defined in the Project Plan. Razavi will communicate insufficient participation of Agency and Razavi resources to the project sponsor with real and potential impacts to the project timeline.
- **Delivery of Needed Information and Documentation**- In order to guarantee success and meet the timelines and costs described it will be essential that the Agency provide required documentation and information as requested by the delivery staff in timely manner. The expected information required is described in detail in each of the delivery sections. Failure to provide the required information can result in an extension of the project timeline and/or an increase in the scope/cost of the proposed solution.
- **Implementation Methodology** – We offer a successful, proven, implementation methodology which is crucial to the project success. Accela's Civic Platform and customer base is a niche market and as such our implementation methodology may differ from other consulting firms and software packages. It is imperative to project success that the Agency is willing to adhere/adopt to the Methodology and tasks described in this Statement of Work.

PROJECT ASSUMPTIONS

- Agency and Razavi will review their roles and responsibilities before work begins to ensure that Services can be satisfactorily completed.
- Changes or additions to scope, requested by the Agency may require a Change Order to reimburse Razavi for the additional costs associated with the change.

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- Agency will provide work space for the Delivery Team for work completed on Agency premises if onsite work is needed. We anticipate no more than 1 staff member onsite at any given time.
- **Razavi** will implement the known features and functions that exist in the current Civic Platform version deployed in the Civic Cloud at the time of the contract signing. Should a new version of the Civic Platform become available during the project implementation, the Agency can request the enhanced features, but it may require a Change Order to reimburse Razavi for the additional cost associated with the change or Agency can implement the enhancement after project go-live.
- Agency will maintain primary responsibility for the scheduling of Agency employees and facilities in support of project activities.
- Agency is responsible for proper desktop hardware/software/network preparation in accordance with Accela specifications.
- Agency is responsible to ensure agency participants have adequate hardware/software to successfully participate in online training (i.e. video and audio streaming).
- Agency will commit to the involvement of key resources and subject matter experts for ongoing participation in all project activities as defined in this SOW. The importance of Agency staff participation is imperative to the successful, and timely, implementation of the project deliverables.

WORK DESCRIPTION

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

DELIVERABLE 1: CIVIC PLATFORM SETUP

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

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

- URL's and login information for each environment

Specifically, Razavi will perform the following tasks within the support environment:

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

Razavi Responsibilities:

- Provide timely and appropriate responses to Agency's request for information.
- Setup the Civic Platform in Accela's Civic Cloud.

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- Provide desktop requirements documentation to Agency.
- Update the specific Accela ePayment SDK with the Agency provided merchant account attributes and deliver completed Accela ePayment SDK to Accela IT.
- Provide instructions on how to login/logout and view the loaded Best Practice Templates

Agency Responsibilities:

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

Acceptance Criteria:

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

DELIVERABLE 2: SET UP OF BEST PRACTICE TEMPLATE CONFIGURATION

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

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

Permitting and Inspections

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

Code Enforcement

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

Planning and Zoning

Subdivision	Design Review	Pre-Application Meeting	Annexation
Preliminary Map	Variance	Appeal	General Plan Update

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Final Map	Rezoning	Time Extension	Specific Plan
Planned Unit Development	Plan Amendment	Modification to Prior Approval	Zoning Text Amendment
Conditional Use	Home Occupation Permit	Confirmation Letter	Lot Line Adjustment
Revocable Permit	Site Plan – Major	Site Plan – Minor	Final Plat
Subdivision – Major	Subdivision - Minor	Preliminary Plat	

Specifically, Razavi resources will:

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

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

Razavi Responsibilities:

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

Agency Responsibilities:

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

Acceptance Criteria:

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

DELIVERABLE 3: SET UP OF AGENCY USERS

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

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

Razavi Responsibilities:

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

Agency Responsibilities:

- Provide timely and appropriate responses to Razavi's requests for information.

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- Arrange for the availability of appropriate Agency staff to provide a list of Agency user accounts and indicate which user group role the user is to be assigned.
- Agency staff must review the Accela BPT Roles and Functions Matrix document
- Agency staff must provide list of user accounts and indicate user group role feedback based on Razavi and City of Foley agreed upon project plan timeline.
- Schedule appropriate Agency staff participants and meeting locations for activities.

Acceptance Criteria:

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

DELIVERABLE 4: WORKFLOW PROCESS AND INSPECTION GROUP DISTINCT UPDATES

Razavi will provide up to **twenty (20)** distinct updates to the existing workflow processes and up to **twenty (20)** distinct updates to the existing inspection groups configured in the deployed Best Practice Templates. Using the Accela Best Practice Template Datasheets, the Agency will indicate which Workflow Process and/or Inspection Groups to update. Distinct workflow process updates include renaming, adding or removing a workflow task or workflow task status result. Distinct inspection group updates include renaming, adding or removing inspection types, inspection status results, checklist items or checklist status results. Each edit, update or removal of a workflow task, workflow status result, inspection type, inspection status result, checklist item or checklist status result is considered a distinct single action change.

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

Razavi Responsibilities:

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

Agency Responsibilities:

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

Acceptance Criteria:

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

DELIVERABLE 5: FEE SCHEDULE CONFIGURATION

The Agency can request up to **twenty (20)** new fee items configured during the project implementation. Razavi will configure up to sixty (60) total fee items that are flat/constant formula type, and of those fees, up to twenty (20) unique fee items can be based on the inherent fee formulas in the Civic Platform, including fees based on specific ranges and

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using fee indicators using the Agency's unique fee description, such as Deck Application or fees based on square footage of a building. Razavi will configure all fee items using the inherent fee formulas in the Civic Platform. Advanced fee item setup, such as automating a fee calculation using the advanced script engine logic is an additional cost and Razavi team can scope the level of effort as a separate deliverable item and may result into a Change Order.

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

Razavi Responsibilities:

- Provide timely and appropriate responses to Agency's request for information.
- Provide the Agency with the Accela Best Practice Template Datasheet documents
- Configure up to sixty (60) new fee items, using Agency unique fee descriptions, using Constant fee formula and of those, up to twenty (20) fees using the remaining inherent fee formulas in the Civic Platform, based on Agency feedback
- Verify the new fee items configured in environment, based on Agency feedback.

Agency Responsibilities:

- Provide timely and appropriate responses to Razavi's requests for information.
- Arrange for the availability of appropriate Agency staff to read through the Accela Best Practice Template Datasheet documents.
- Agency staff must provide a list of the new fee items (up to 60 items) to Razavi, which include fee description, the fee value amount, should the fee item be automatically invoiced or assessed, which record type(s) the fee item is associated to, and will the fee item be displayed in Citizen Access based on Razavi and City of Foley agreed upon project plan timeline.
- Agency staff must review and test all fee items configuration and provide feedback to Razavi based on the agreed upon project plan timeline.
 - *Any additional changes identified during review and testing beyond the scope identified above may be subject to a Change Order request*
- Staff participants have successfully read and completed the recommended online course content
- Schedule appropriate Agency staff participants and meeting locations for activities.

Acceptance Criteria:

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

DELIVERABLE 6: NEW SERVICE RECORD TYPE CONFIGURATION

Razavi will configure up to **five (5)** new service record types, not already represented in the Accela Best Practice Templates, such as Elevator Permit or Deck Permit. Razavi will use the existing, preconfigured record components, like workflow process, inspection groups, record status result, fee schedule, document status.

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

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

Razavi Responsibilities:

- Provide timely and appropriate responses to Agency's request for information.
- Provide the Agency with the Accela Best Practice Template Datasheet documents
- Configure up to five (5) new service record types using existing, preconfigured record components, such as workflow process, inspection group, record status result, fee schedule, based on Agency feedback
- Verify the new service record types configured in environment, based on Agency feedback.

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Agency Responsibilities:

- Provide timely and appropriate responses to Razavi's requests for information.
- Arrange for the availability of appropriate Agency staff to read through the Accela Best Practice Template Datasheet documents.
- Agency staff must provide a list of the new service record types (up to 5) to Razavi, which include record type levels, record name and the applicable record components, like fee schedule, inspection group, workflow process, record ID sequence, available in Citizen Access, document code, record status result, etc., based on Razavi and City of Foley agreed upon project plan timeline [*indicate duration of time here*]
- Agency staff must review and test all service record type configuration and provide feedback to Razavi based on the agreed upon project plan timeline [*indicate duration of time here*]
 - *Any additional changes identified during review and testing beyond the scope identified above may be subject to a Change Order request*
- Staff participants have successfully read and completed the recommended online course content
- Schedule appropriate Agency staff participants and meeting locations for activities.

Acceptance Criteria:

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

DELIVERABLE 7: NEW AGENCY DEFINED DATA FIELDS CONFIGURATION

The Agency can request up to **ten (10)** new agency defined data fields configured and associate the data elements to specific record types to ensure information is tracked according to the Agency business process and municipal reports, such as Elevator ID or Roof Color. Razavi will configure each new agency defined data field using one of nine (9) data types: text, date, y/n radio button, number, dropdown list, comment text area, time, money or checkbox.

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

Razavi Responsibilities:

- Provide timely and appropriate responses to Agency's request for information.
- Provide the Agency with the Accela Best Practice Template Datasheet documents
- Configure up to ten (10) new agency defined data fields and associate the data elements to the specific record types, based on Agency feedback
- Verify the new agency defined data fields configured in environment, based on Agency feedback.

Agency Responsibilities:

- Provide timely and appropriate responses to Razavi's requests for information.
- Arrange for the availability of appropriate Agency staff to read through the Accela Best Practice Template Datasheet documents.
- Agency staff must provide a list of the new agency defined data fields (up to 10) to Razavi, which include data field label, data field type, flagged as required, available in Citizen Access, indicate which service record type to associate to, etc., based on Razavi and City of Foley agreed upon project plan timeline.
- Agency staff must review and test all agency defined data fields configuration and provide feedback to Razavi based on the agreed upon project plan timeline.
 - *Any additional changes identified during review and testing beyond the scope identified above may be subject to a Change Order request*
- Staff participants have successfully read and completed the recommended online course content
- Schedule appropriate Agency staff participants and meeting locations for activities.

Acceptance Criteria:

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

DELIVERABLE 8: EXISTING USER GROUP PERMISSION DISTINCT UPDATES

Razavi will provide up to **five (5)** distinct updates to the existing user group permissions configured in the deployed Accela Best Practice Templates. Using the Accela Roles and Functions Matrix document, the Agency will indicate which permissions need to be updated for the user group role. For example, if the Agency wants the inspector role to collect fees and payments, this will be an update to allow additional access to the current role defined. Each permission update, add or removal of access for a defined user role is considered a distinct single action change.

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

Razavi Responsibilities:

- Provide timely and appropriate responses to Agency's request for information.
- Deliver and provide instructions on the Accela Roles and Functions Matrix document
- Configure up to five (5) distinct updates to the existing user group permissions, based on Agency feedback
- Verify the updated user group permissions configured in environment, based on Agency feedback.

Agency Responsibilities:

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

Acceptance Criteria:

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

DELIVERABLE 9: NEW USER GROUP PERMISSION WITH DISTINCT UPDATE CONFIGURATION

The Agency can request up to **two (2)** new user group permissions created, by copying or cloning an existing, defined user group deployed from the Accela Best Practice Template with up to **three (3)** distinct updates per new user group permission created, such as add or removal of access for the defined user role. The newly defined user group can be associated to a named staff user account login. For example, if the Agency would like to define a new user role, such as cashier or supervisor, the Razavi will copy/clone an existing user group and create a new role with permission updates if needed. Each permission update, add or removal of access for a defined user role is considered a distinct single action change.

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

Razavi Responsibilities:

- Provide timely and appropriate responses to Agency's request for information.
- Deliver and provide instructions on the Accela Roles and Functions Matrix document

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- Configure up to two (2) new user group permissions by copying/cloning existing user groups deployed from Accela Best Practice Template with up to three (3) distinct updates per new user group role created, based on Agency feedback
- Verify the new user group permissions configured in environment, based on Agency feedback.

Agency Responsibilities:

- Provide timely and appropriate responses to Razavi's requests for information.
- Arrange for the availability of appropriate Agency staff to read through the Accela Roles and Functions Matrix document.
- Agency staff must provide a list of the new user group permissions (up to 2) and the permission updates (up to 3) to Razavi, which include name of new user group role, which user group to copy, the function names to update based on Razavi and City of Foley agreed upon project plan timeline.
- Agency staff must review user group permission configuration and provide feedback to Razavi based on the agreed upon project plan timeline.
 - *Any additional changes identified during review and testing beyond the scope identified above may be subject to a Change Order request*
- Staff participants have successfully read and completed the recommended online course content
- Schedule appropriate Agency staff participants and meeting locations for activities.

Acceptance Criteria:

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

DELIVERABLE 10: CITIZEN ACCESS CONFIGURATION

This deliverable includes setup and configuration of the Agency municipal website branding, the online payment processing gateway for the supported payment vendors (Official Payments, PayFlow Pro 4.3 (PayPal) and Virtual Merchant for Citizen Access, and up to **five (5)** distinct updates to the citizen portal pages to make the pages more in line with the Agency processes per the best practice configurations. Distinct updates to the citizen portal pages include, adding a pageflow component, like attachments to an existing defined pageflow setup, updating the section instructional text with agency language, including descriptive help instructions for specific agency defined data fields, or updating the online disclaimer text. Each update to the citizen portals and sections are considered a single action change.

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

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

Razavi Responsibilities:

- Provide timely and appropriate responses to Agency's request for information.
- Setup Citizen Access branding by loading two (2) banner files provided by the Agency
- Update the specific Accela ePayment SDK with the Agency provided merchant account attributes and deliver completed Accela ePayment SDK to Accela IT. Currently, the Civic Platform inherently supports Official Payments, PayFlow Pro 4.3 (PayPal) and Virtual Merchants.
- Configure up to five (5) distinct updates to the citizen portal pages, based on Agency feedback
- Verify the loaded citizen access branding, citizen portal pages and sections updated and payment acceptance in environment, based on Agency feedback.

Agency Responsibilities:

- Provide timely and appropriate responses to Razavi's requests for information.
- Provide website branding files, which include the top and side banner

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- Arrange for the availability of appropriate Agency staff to review the branding on Citizen Access
- Agency staff is responsible to work with the supported payment vendor (Official Payments, PayFlow Pro 4.3 (PayPal) and Virtual Merchant) to collect the necessary information for the payment processing gateway. For example, the staff will need to provide the Razavi information such as the Product ID, Convenient Fee values, the Payment gateway URLs and other vital information to successfully implement the payment processing gateway.
- Agency staff must provide web branding, a list of distinct updates (up to 5) and supported payment vendor information based on Razavi and City of Foley agreed upon project plan timeline.
- Agency staff must review and test all Citizen Access configuration and provide feedback to Razavi based on the agreed upon project plan timeline.
 - *Any additional changes identified during review and testing beyond the scope identified above may be subject to a Change Order request*
- Staff participants have successfully read and completed the recommended online course content
- Schedule appropriate Agency staff participants and meeting locations for activities.

Acceptance Criteria:

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

DELIVERABLE 11: PROPERTY DATA UPLOAD

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

Razavi Responsibilities:

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

Agency Responsibilities:

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

Acceptance Criteria:

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

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DELIVERABLE 12: LICENSED PROFESSIONAL DATA UPLOAD

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

Razavi Responsibilities:

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

Agency Responsibilities:

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

Acceptance Criteria:

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

DELIVERABLE 13: EXPRESS HISTORICAL DATA CONVERSION

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

Note: If the Agency would like assistance creating an acceptable pipe delimited text data file(s), the Razavi team can scope the level of effort as a separate deliverable item and may result in a Change Order request.

Razavi will also provide data conversion services for the three licensing record types. Agency is responsible for extraction and formation of data from their existing system(s).

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

- Historic completed permits are to be converted into a single record in the Civic Platform called "Historic". A single historic record can be available per module implemented, with the following data populated when provided:
 - Base record information such as permit number, work description, date opened, date closed

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- Record based data items
- Transactional property and people, including Addresses, Parcels, Owners, Licensed Professionals, and Contacts
- Inspection History
- Total invoiced, total paid, and balance

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

Razavi Responsibilities:

- Provide timely and appropriate responses to Agency's request for information.
- Convert the provided acceptable pipe delimited text file into Civic Platform, maximum of up to 3 times.
- Maintain an on premise Civic Platform Sandbox to convert the provided client data and send the generated .dpdmp file and .expdplog file as a Customer Support request to load the data into the specified client agency in the Accela Cloud Support environment.
- Provide and explain the Accela Express Historical Data Conversion Document

Agency Responsibilities:

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

Acceptance Criteria:

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

DELIVERABLE 14: CIVIC PLATFORM TRAINING

The platform includes access to a large library of agency staff administrator and agency end user training materials in Accela's Success Community system, available online and self-paced, at no additional cost. Each agency staff user can request login credentials and gain access to the entire library of training materials which include video tutorials, how-to documents, administrator and end user guides. The online training content focuses on the administration, maintenance and augmentation of the Civic Platform configuration.

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

- Access to Accela Success Community online training content

Razavi Responsibilities:

- Provide Agency the Accela Success Community website, provide instruction on how to register and login, along with how to search for and find the online training content

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Agency Responsibilities:

- Select and provide the Accela Success Community website to the staff users who will require the online training content.
- Ensure that users are proficient in using PC's as a prerequisite before accessing the online training content.
- Ensure that users are familiar with use of standard Internet browsers as a prerequisite for the course.
- Ensure that users have appropriate hardware/software for successfully viewing online video content.
- Ensure that users are successfully reading and completing the recommended online course content throughout project implementation.

Acceptance Criteria:

- Access Accela Success Community online training

COST

Razavi will perform the Services on a pre-paid basis based on: the nature and scope of the Services and associated Deliverables outlined in this SOW, the expected staffing requirements, project schedule, Razavi's and Customer's roles and responsibilities and the other assumptions set forth in this SOW. Razavi's total price to perform the Services and provide the Deliverables described is \$54,627.78 exclusive of taxes and expenses (the "Fixed-Fee"). The Fixed-Fee price is based on the information available at the time of signing and the assumptions, dependencies and constraints, and roles and responsibilities of the Parties, as stated in this SOW. The Fixed-Fee price will be invoiced upon contract signing.

EXPENSES:

Actual amounts of any reasonable and customary travel expenses incurred during the performance of services under this SOW will be billed to Agency, according to **Razavi** expense policy. **Razavi** will bill Customer for actual expenses incurred for travel and lodging/living, as well as other approved out-of-pocket expenses (such as mileage, parking, tolls and telecommunications charges). **Razavi** will work with Customer to manage and control its expenses in accordance with **Razavi** travel policy guidelines and will not incur expenses in excess of the initial contracted budget below without Customer's prior written consent. Expense receipts will be made available as requested by Agency. Total estimated expenses are based on past engagement experience. Based on the assumption that there will only need to be zero onsite trips at an estimated \$5,000 each, the travel expense budget estimate is \$0.00.

Acceptance:

Accepted by: Razavi

Accepted by: City of Foley

Authorized Signature

Authorized Signature

Name - Type or Print

Name - Type or Print

Title

Title

Date

Date