

ARLINGTON COUNTY, VIRGINIA
OFFICE OF THE PURCHASING AGENT
2100 CLARENDON BOULEVARD, SUITE 500
ARLINGTON, VIRGINIA 22201

NOTICE OF CONTRACT AMENDMENT

See Accela, Inc. 2633 Camino Ramon, Ste. 500 San Ramon, CA 94583	DATE ISSUED: CURRENT REFERENCE NO: CONTRACT TITLE: AMENDMENT NO:	<u>March 29, 2016</u> <u>530-15-RFP</u> <u>Permitting and Land Management System</u> <u>7</u>
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**THIS IS A NOTICE OF AMENDMENT OF CONTRACT AND NOT AN ORDER. NO WORK IS AUTHORIZED UNTIL THE
VENDOR RECEIVES A VALID COUNTY PURCHASE ORDER ENCUMBERING CONTRACT FUNDS.**

The contract documents consist of the terms and conditions of AGREEMENT No. 530-15-RFP including any attachments or amendments thereto.

EFFECTIVE DATE: June 12, 2020
EXPIRES: March 30, 2021
RENEWALS: Five (5) one-year Renewal Options
COMMODITY CODE(S): 96109
LIVING WAGE: N
PROFESSIONAL SERVICES: N

ATTACHMENTS:
AMENDMENT NO. 6

EMPLOYEES NOT TO BENEFIT:
**NO COUNTY EMPLOYEE SHALL RECEIVE ANY SHARE OR BENEFIT OF THIS CONTRACT NOT AVAILABLE TO THE
GENERAL PUBLIC.**

<u>VENDOR CONTACT:</u> Brenda DeGregory	<u>VENDOR TEL. NO.:</u>	<u>(925) 659-3200</u>
<u>EMAIL ADDRESS:</u> bdegregory@accela.com		

<u>COUNTY CONTACT:</u> Elise Ostiguy, DTS-Enterprise Technology & Application Services	<u>COUNTY TEL. NO.:</u>	<u>(703) 228-3347</u>
<u>COUNTY CONTACT EMAIL:</u> eostiguy@arlingtonva.us		

ARLINGTON COUNTY, VIRGINIA

**AGREEMENT NO. 530-15
AMENDMENT NUMBER 7**

This Amendment Number 7 is made on the date of execution by the County and amends Agreement Number 530-15 dated March 31, 2016, ("Main Agreement") between Accela, Inc. ("Contractor") and the County Board of Arlington County, Virginia ("County").

The County and the Contractor amend the services as amended and described in **Exhibit 1 and Exhibit 2** of this Amendment.

All other terms and conditions of the Main Agreement remain in effect.

WITNESS these signatures:

THE COUNTY BOARD OF ARLINGTON
COUNTY, VIRGINIA

ACCELA, INC.

AUTHORIZED
SIGNATURE: _____

DocuSigned by:
Sharon Lewis
89B86B1AD301462...

AUTHORIZED
SIGNATURE: _____

DocuSigned by:
Brenda DeGregory
73C9FA2105844F6...

NAME: Sharon T. Lewis
TITLE: Purchasing Division Chief

NAME AND
TITLE: Brenda DeGregory Vice President

DATE: 6/12/2020

DATE: 6/12/2020

Amend Exhibit A (“Statement of Work: Arlington County Integrated Permitting and Land Management System”) as shown below.

- **Note: Gaps in deliverable numbers reflect completed deliverables that applied only to Phase I and that therefore were removed from this document; original deliverable numbering was retained for consistency.**

I. Replace Section 2.3 Deliverables and Timeline with the following

DELIVERABLES AND TIMELINE

The project is to be delivered (go-live) in two Phases. The deliverables in this statement of work are applicable only to Phase II, to include 42 record types fully functional in the Production environment and transferred to Accela Customer support at the end of Phase II. The specific record types included are identified in Table A (see Deliverable 03). The table directly below provides a list of the project deliverables applicable to Phase II, which are detailed in Appendix B. Project duration and number of trips for each deliverable will be decided by Accela and the County Project Managers as needed and subject to the terms included in the Payment schedule. Accela will provide services to support the County in completing each of the following deliverables below on a Time and Materials basis.

Stage	Deliverable	Deliverable Title
Initiation and To-Be Analysis – Completed in June 2017	1	Project Planning and Documentation
	2	Accela Civic Platform Cloud Setup
	3	To-Be Analysis Sessions
	4	To-Be Analysis Document
	24	Project Management (To-Be Analysis stage) – complete prior to Amendment 2.
Completed in Phase I	06	Interface Analysis and Development
	07	EDR Analysis
	13	Administrative Training
	14	Power User and End User Training
	19	OnBase EDR and EDMS Integration
	21	GIS Deployment
Removed from Phase II	02	AMD2: Record Type Finalization
	14	Power User and End User Training
	10	Report Specifications and Development
Define	01a	Project Initiation – Go-Live Grouping IIa
	01b	Project Initiation – Go-Live Grouping IIb
Refine and Develop	03	Record Type Configuration Workshops Go-Live Grouping IIb
	04a	Historic Data Conversion Analysis – Go-Live Grouping IIa
	04b	Historic Data Conversion Analysis – Go-Live Grouping IIb
	04c	Historic Data Conversion Analysis – Go-Live Grouping IIc
	05a	Historic Data Conversion Development – Go-Live Grouping IIa
	05b	Historic Data Conversion Development – Go-Live Grouping IIb
	05c	Historic Data Conversion Development – Go-Live Grouping IIc
	08	Selectron IVR-Interactive Voice Response System Interface Go-Live Grouping IIb
	09	Business Process Validation and Automation (Scripting)
	11	Accela Citizen Access Deployment – Go-Live Grouping IIb
	12a	Accela Mobile Apps Configuration – Go-Live Grouping IIa

	12b	Accela Mobile Apps Configuration – Go-Live Grouping IIb
	15	User Acceptance Testing – Go-Live Grouping IIb
	16a	Production Support – Go-Live Grouping IIa
	16b	Production Support – Go-Live Grouping IIb
	17a	Post Deployment Support & Transition to Customer Support – Go-Live Grouping IIa
	17b	Post Deployment Support & Transition to Customer Support – Go-Live Grouping IIb
	20a	Security Setup – Go-Live Grouping IIa
	20b	Security Setup – Go-Live Grouping IIb
Manage	18	Project Management – Go-Live Grouping IIb
	22	Support – Go-Live Grouping IIc

II. Replace Section 2.4 Assumptions and General Responsibilities with the following:

ASSUMPTIONS

This section contains assumptions upon which Accela has relied on in agreeing to perform the Services described in this SOW. If any of these proves to be incorrect, it may cause changes to the project's schedule, fees, expenses, work product or level of effort required, or may otherwise impact Accela's performance of the Services. If this occurs, change requests may be required.

General

- Accela must implement the feature set available in the current Accela Production release at the time of contract signing. New releases and patch upgrades will be deployed to the Accela Cloud Production environment throughout this implementation.
- All IVR support outside that required for configuration of the Selectron IVR interface with Accela as provided in Deliverable 08: Selectron IVR-Interactive Voice Response System Interface will be solely managed by the County
- The County is responsible for the installation and maintenance of all third-party products unless hosted in the Accela Cloud Environment, with the exception of the Virginia State License Database.
- The County will provide Accela resources access to a Development or Test environment of the third-party software systems for interface development, with the exception of the Virginia State License Database. All interfaces will be developed against one agreed-upon version of the third-party system and unit tested in both Test and Development environments for each third-party system. If local development of interfaces is required, the County will provide a workstation with appropriate software for development (e.g. Visual Studio).
- A total of three hosted Accela environments will be created for the County in the Accela Hosted Environment. These environments will be referred to as Development environment, where all implementation development and post implementation development will occur; Test environment, which is typically used for Testing which includes regression testing for post go live upgrades and implementation testing; and Production. Each environment will run the latest Accela version that has been installed by Accela Cloud Operations and included in this SOW.
- Security/user set up outside the Civic Platform will be handled by the County (i.e. OnBase, Windows Active Directory, etc.)

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- The project will be monitored by an Accela Project Executive who must serve as a point of escalation and final decision maker for Accela for contract matters. The Accela Project Executive must also monitor deliverable quality and schedule performance throughout the project. These services of the Accela Project Executive will be provided at no additional cost to the County.
- When the project team works on-site at a County facility, suitable workspace will be provided and equipped with appropriately functional and usable desktop workstations, phones, network access to and connectivity with all systems, networks, and data as necessary to perform the project.
- Accela personnel must attend County executive steering committee meetings as needed.
- Accela must provide the County with one electronic copy of all project documentation identified in Deliverables.
- Accela must participate as needed in County meetings where the software and implementation of such, and/or the approval of deliverables for which Accela is a primary contributor are being defined.
- The County and Accela will respond to respective requests for information, data, and clarifications and make Project-related decisions within five working days unless otherwise agreed upon to prevent delays that may impact the project schedule.
- Accela must have access to County subject matter experts to assist in identifying business rules, resolving process discrepancies, and answering questions.
- All supporting documentation and work products will be developed for industry standard Microsoft Windows based PCs using appropriate Microsoft Office applications (Word, Excel, Visio, Project and PowerPoint) or other mutually agreeable documentation development processes and/or applications.
- Work may be completed either onsite or remotely as agreed upon by the County and Accela. Onsite work will be performed in Arlington County, Virginia and/or the Washington DC metro area as determined solely by the County. Remote work will be performed from any location, as determined by Contractor.

Scope and Timeline

- The project schedule for Phase IIb is managed by Accela using Microsoft Project. Should any tasks fall behind schedule for ten (10) business days, Accela and County will escalate according to the Escalation Plan in the Project Charter and invoke the [Change Management](#) process.
- All Services will be performed on a Time and Materials basis at the County's direction. If a change is identified that will impact the project approach, timeline, estimated resources or scope, the County and Accela Project Managers will invoke the Change Management process to determine the impact to the project budget. Any changes to the project scope or schedule, including the extension of project or deliverable timelines, may result in a change order for additional fees based on the remaining allocated hours for this project.
- Deliverables will be documented using the Accela associated templates. Any changes to the templates must be agreed to by the Accela Project Manager.

Testing

- Accela and Arlington County are both responsible for unit testing. Accela will be responsible for only that unit testing functionality developed by Accela resources.
- Accela must support the remaining testing processes in each Phase, correcting defects based upon expected functionality captured in the BRD/SRS (Business Requirements Documentation/System Requirements Specification), as defined in Deliverable 03 Record Type Configuration Workshops.

Acceptance

Prior to deliverable acceptance, all tasks identified as Accela and County responsibilities must be complete.

The deliverable review process consists of a 10-business day, single review cycle (i.e., submit, review, cure, accept). Second reviews will only consider Defects and comments raised during the first review.

The County will return one consolidated set of comments to Accela, which are to be consistent with previously defined acceptance criteria. The review cycle includes the following steps (the days specified may be altered based on deliverable acceptance criteria throughout Appendix C or the agreed to Project Plan):

- Deliverable Submitted
- County has 5 business days for review
- Accela has 2 business days to cure
- County has 3 business days to review and approve or reject

The deliverable will be deemed accepted, and the project team will proceed in accordance with the contents of the deliverable, seven business days after submittal if there has been no response or comments from the County.

Upon completion of each deliverable, Accela must provide the County with the Accela Deliverable Acceptance Form to formalize acceptance and completion. The Deliverable Acceptance Form will subsequently be signed by the appropriate County contact, as defined in the Project Charter, and then delivered to Accela.

The County is responsible for determining whether the deliverables, including any revised business processes implemented pursuant to this SOW, meet County's business requirements.

III. Replace Appendix B – Stages, Deliverables and Tasks with the following:

PHASE II DELIVERABLE DESCRIPTIONS, SCOPE and ACCEPTANCE CRITERIA

Deliverable 01a and 01b: Project Initiation

Project Initiation is an opportunity to ensure the project starts in a well-organized, structured fashion while re-confirming the parties' expectations regarding the implementation. This Deliverable is comprised of project planning activities and core project management documents. All documents referenced in this deliverable will be updated for each go-live grouping IIa and IIb as shown in Table A.

Certain documents referenced in this deliverable are defined as follows:

- Communication Plan. The communication plan includes methodology of providing stakeholders with information about a project. The plan formally defines who should be given specific information, when that information should be delivered and what communication channels will be used to deliver the information. An effective communications plan anticipates what information will need to be communicated to specific audience segments. The plan should define

EXHIBIT 1

what communication channels stakeholders should use to provide feedback and how communication documentation will be archived as part of the project records

- Project Charter. The Project Charter defines the objectives, scope, characteristics and structure of the project implementation for the County, and forms a governance artifact that is an agreement between Accela and the County as to how the project will be executed and completed, including a detailed Escalation Plan
- Project Plan. The Project Plan is a formal, approved document used to guide both project execution and project control; the primary uses of the project plan are to document planning assumptions and decisions, facilitate communication among stakeholders, and document approved scope, cost, and schedule baselines
- Risk and Issue Management Plan. The Project Management Plan captures how the project will be managed from governance, to the methodology, and includes risk and issue management and tracking.

Accela Responsibilities:

- Finalize staffing for the project teams
- Provide Accela's standard Project Status Report Template format and work with the County to agree upon a format for all weekly Status Reports for this project
- Provide responses to County's request for information.
- Coordinate project planning activities.
- Communicate the Accela implementation methodology that will be used by Accela to deliver Services.
- Update the following documents, with input from the County Project Manager:
 - Project Plan that includes resource allocation for all tasks;
 - Project Schedule;
 - Project Charter;
 - Roles and responsibilities;
 - Risk and Issue Management plan; and
 - Communication Plan
- Work with the County to identify team members responsible for signoff from the County and Accela

County Responsibilities:

- Identify and set expectations with key resources and subject matter experts for ongoing participation in the project, including dedicated Project Manager and Functional Lead.
- Respond to Accela's requests for project planning input and meeting logistics requests.
- Provide meeting facilities for onsite activities.
- Review and provide feedback on all documents identified in Accela Responsibilities for this Deliverable.

Deliverable 03: Record Type Configuration Workshops

This deliverable applies only to Go-Live Grouping IIb. The County will lead Configuration Workshops to include the County technical and functional teams, County Business Leads and Subject Matter Experts, and Accela staff, as appropriate for the record type. The Configuration Workshops will follow an Agile methodology for each record type in which participants identify all user stories, business logic and Accela

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Citizen Access and Accela Automation user interface requirements and the County creates a BRD/SRS (Business Requirements Documentation/System Requirements Specifications) document to record the overall Accela Civic Platform solution. In response to the outcomes of each workshop based on 'Table A – Record Types In Scope', either the County or Accela will configure business logic and user interfaces to result in functional parts as identified in the BRD/SRS. The County, with assistance from Accela, will demo the records to the County business team. Each record type will be developed, and subsequently demoed to business owners, over the course of a defined number of two-to-three-week sprints to be jointly determined for each record type by the County and Accela Project Managers. If the feedback from the business owners mandates a change to interface layout, data processing or work flow, the County will document those requests into updated BRD/SRS for development in subsequent sprints.

This deliverable will include the following:

- 1) Workshops to identify, review and document full record type requirements and functionality with the County business team over multiple workshops for each record type, including:
 1. Identification and documentation of user stories and business logic
 2. Identification of interface requirements and required fields for Accela Citizen Access and Accela Automation
 3. Review of approved EDR functionality and points of integration with OnBase
 4. Identification of work flow
 5. Fees will be finalized, and required calculations will be confirmed for each fee in each record type.
 6. Scripting specifications will be finalized and stored within a SharePoint list and assigned to either Accela or the County as agreed to by the County and Accela Project Managers
 7. Identification by the County of reports required for each record type
 8. Inspections and re-inspections (if necessary for the record)
 9. Active revisions and associated resubmittal (if necessary for the record)
 10. Revisions to approved permit (if necessary for the record)
- 2) Configuration of functionality and requirements, as identified through each workshop
- 3) Where the latest available OnBase/Accela integration techniques used by Accela for Accela Automation and Accela Citizen Access meet or exceed the capabilities of the existing solution developed for the County in Phase I, those techniques will be presented to the County to determine if hours should be allocated to updating current functionality.
- 4) Demonstration of functionality configured based upon the previous workshop for each record type and subsequent reconfiguration in response to County review and feedback, as identified through best practices in Agile methodology

Accela will document in SharePoint the following and for each item below, required scripts will be documented in the scripting list:

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- 1) Fee calculations – Depending on the calculation, scripting may be required; in this case required scripts will be documented in the scripting list.
- 2) Scripting specifications
- 3) Inspections/Guide sheets
- 4) Active revisions
- 5) Revisions to approved permit

After each workshop, sprint and associated demo is complete, the County will update requirements documents and verify that the documentation provided by Accela accurately reflects the information provided for fee calculations, scripting, inspections/guide sheets, active revisions and revisions to approved permits.

Accela Responsibilities:

- Provide responses to the County's requests for information.
- For Record Types assigned to Accela, Document fee calculations, scripting specifications, inspections/guide sheets, active revisions and revisions to approved permit functionality in SharePoint as listed above, for review by the County.
- Attend and participate in workshops with the County for record types as assigned
- Articulate best practices for all Accela Citizen Access/Accela Automation functionality new to the County
- Provide quality assurance review by Solution Architect for main configuration decisions for each record type prior to configuration
- Update all record types assigned to Accela with all agreed-to Accela configuration from all sessions.
- Unit test all agreed-to configuration and provide document showing functionality tested, input parameter(s) used, and output received for each user story developed
- Update and unit test all record types developed by Accela with configuration changes identified through demonstrations to the County of configured functionality.
- Provide the County with the Configuration Report for each record type reflecting all changes resulting from the final session for each record type.

County Responsibilities

- Provide responses to Accela's requests for information.
- Make available the appropriate County key decision makers for work sessions as needed.
- Review and confirm the notes provided for each workshop.
- Document, and as needed update, complete user stories and BRD/SRS for each record type to incorporate decisions from each session for each record type.
- Update and unit test record types, where applicable, with agreed OnBase configurations from all sessions.
- Work with Accela to determine a resolution to any open issues.
- Review and confirm resolved issues within the acceptance criteria timeframe as noted in the above assumptions, under Acceptance.

TABLE A - RECORD TYPES IN SCOPE

*Denotes data conversion only; the County will perform all business requirements and configuration for those record types.

**Denotes data conversion only; the County will perform all business requirements and production and post-production support and will seek support from Accela as needed on an hourly basis. Some record types in this list may be eliminated from scope.

^aDenotes Accela will develop inspections for this record type

	Phase II		Dev Group	Go-live Grouping
1	ISD	Amusement Device*	1	IIa
2	ISD	Asbestos* ^a	1	IIa
3	Zoning	Board of Zoning Appeals*	1	IIa
4	Zoning	Board of Zoning Appeals Use Permit/Variance*	1	IIa
5	Zoning	Accessory Dwelling Unit*	2	IIa
6	Zoning	Family/Caregiver Suite*	2	IIa
7	ISD	Building Code Compliance or Code Enforcement Appeal*	2	IIa
8	ISD	Building Code Modification*	2	IIa
9	ISD	Building Demolition*	2	IIa
10	Zoning	Fence	3	IIb
11	Zoning	Sign	3	IIb
12	Zoning	Administrative Change	3	IIb
13	ISD	Certificate of Occupancy: Change of Ownership	4	IIb
14	ISD	Certificate of Occupancy: Commercial Master, Residential Master, Shell and Core, Temporary CO	4	IIb
15	Multi	Certificate of Occupancy Project	4	IIb
16	Zoning	Certificate of Occupancy Change of Use/Tenant	4	IIb
17	ISD	Certificate of Occupancy: Short Term	4	IIb
18	ISD	Elevator Periodic Inspection	5	IIb
19	ISD	Periodic Inspection Cross Connection (Plumbing)	5	IIb
20	ISD	Building Project	6	IIb
21	ISD	Building Permit – Commercial Complexity 1	6	IIb
22	ISD	Building Permit – Commercial Complexity 2	6	IIb
23	ISD	Building Permit – Commercial Complexity 3	6	IIb
24	ISD	Building Permit – Commercial Complexity 4	6	IIb
25	ISD	Building Permit – Residential Complexity 1	6	IIb
26	ISD	Building Permit - Residential Complexity 2	6	IIb
27	ISD	Building Permit – Residential Complexity 3	6	IIb
28	DES	Land Disturbing Activity	7	IIb
29	ISD	Electrical Permit	7	IIb
30	ISD	Mechanical Permit	7	IIb
31	ISD	Plumbing/Fuel Gas	7	IIb
32	ISD	Fire	7	IIb
33	ISD	Elevator	7	IIb
34	DHS	DHS Complaint**	8	IIc
35	ISD	Code Enforcement Complaint**	8	IIc
36	ISD	Snow Removal Complaint**	8	IIc
37	Zoning	Zoning Complaint**	8	IIc
38	Zoning	Code Compliance Complaint**	8	IIc
39	Zoning	Complaint Project**	8	IIc
40	Multi	Enforcement Case**	8	IIc
41	Multi	Proactive Inspection – ISD**	8	IIc
42	Multi	Proactive Inspection - Zoning**	8	IIc

Deliverable 04a, b and c: Historic Data Conversion Analysis

This deliverable applies to all Go-Live Groupings IIa, IIb and IIc as shown in Table A.

Accela Responsibilities:

- Work with the County to define and document and analyze the following historical data elements from the five sources (4A-4E) listed below, all of which are required for the conversion.

	System/Database/File Name	Description of Data to be Converted
4A	Accela Permits Plus	Permits Plus data objects <ul style="list-style-type: none"> i. Permits, applications and case records ii. Permits Plus master contact data iii. Building, zoning and enforcement records iv. ePlan review records that include an OnBase ePlan Project ID v. Fee transaction records vi. Accounting codes vii. Code enforcement supporting documents (attachments to Permits Plus records) viii. Permits Plus lookup tables
4B	Administrative Approval	Administrative approval access database
4C	Zoning Case Management	Zoning Case Management access database
4D	Use Permits	Use Permit access database
4E	<i>Signs Data</i>	<i>Signs Excel Spreadsheet</i>

- Upon receipt of the County's legacy data, create the legacy Data Conversion Mapping Document that details the process of mapping and converting the County's legacy data in the staging tables to be placed into the Accela Civic Platform. This must be completed at a core level for each record (no custom fields) prior to the initial run, which will be a core data run. Prior to the 2nd and 3rd runs, which are intended to be full data runs, the entire mapping must be complete for the record.
- Analyze each of the data system/database/files (4A-4E) for quality and use and determine where the data will be stored in the Accela Civic Platform and create a Data Conversion Specifications document reflecting the analysis
- Create a legacy Data Conversion Strategy document that provides detailed information on the methodology and approach for migrating data from the system/database/files (4A-4E) to the Accela Civic Platform.

County Responsibilities:

- Provide historical data in a single data source for each of the five system/database/files (4A-4E) identified above for each Go-Live Grouping identified in Table A
- Provide subject matter experts on each system/database/file (4A-4E) to identify key components of the historical data
- Review and confirm accuracy of Data Conversion Strategy documents for each system/database/file (4A-4E)
- Review and confirm accuracy of Data Conversion Mapping document
- Script data conversion as needed

Deliverable 05a, b and c: Historic Data Conversion Development

Upon County approval of the Historical Data Conversion Mapping documents (Deliverable 4), Accela will provide a program(s) to migrate appropriate historical data into Accela Automation. Accela will then assist the County in mapping from the staging tables to the Civic Platform. For Phase II, the data conversion will occur separately for each Go-Live Grouping IIa, IIb and IIc, as identified in Table A.

Accela Responsibilities:

- Develop and unit test the programs to migrate historical data in the Accela Civic Platform
- Using data/records provided by the County, unit Test the conversion programs through three mini-conversions used to validate all conversion programs and to ensure quality;
- Run data conversion Test Loads (a Test Load is a full run of all data to be converted in the data set) from each data system/database/files (4A-4E) for County testing in Test and Development environments for each Phase, accounting for and correcting all issues identified through the three mini-conversions and until all data are successfully uploaded into target fields
- Validate the successful completion of the migration of historical data into the County's Test and Development environments from each data source, including testing a sampling of data that relates to the existing ePlan functionality.
- Provide the output of each Test Load to the County for verification
- Completion of successful Test Load of all data (4A-4E) into Accela Automation Development and Test environments.
- The data sources in 4B – 4E will not create new record id's in the data conversion process . It is assumed that the data sources in 4B – 4E will be used to update or append data to the Permits Plus data.

County Responsibilities:

- Provide the legacy data source in an acceptable format, as identified in the Data Conversion Strategy document (see Deliverable 04).
- Assist in the execution of the data conversion program and provide access to County data sources and County Test and Development environments as needed.
- Provide staff resources who will review and validate the conversion statistics and the quality of the data converted into Accela Automation and provide feedback to Accela after each mini-conversion and Test Load within 10 business days of delivery.

Deliverable 08: Selectron IVR-Interactive Voice Response System Interface

Accela must remotely provide up to 40 hours of support for the configuration, testing and deployment of the Selectron IVR Accela Adapter. This deliverable relates only to Go-Live Grouping IIb, as shown in Table A.

Accela Responsibilities:

- Provide up to 40 hours of remote support in response to the County's and/or Vendor's (Selectron's) request for information related to installation, configuration, testing and implementation of the Selectron IVR Accela Adapter.
- Document hours spent on Selectron IVR support identifying the Accela project team member and activity.

County Responsibilities:

- Acquire the Selectron IVR Accela Adapter software and services for deployment.
- Implement the Selectron IVR Accela Adapter.

Deliverable 09: Business Process Validation and Automation (Scripting)

This deliverable applies only to Phase IIb. Accela will provide a complete list of custom script requests. The County will review and prioritize the custom script list against the following scoping table to determine which scripts Accela will create. The County will provide scripting resources to complete all script scope overages for Phase II. Development of customary and logical scripts such as responsive design, formatting, data integrity, consistency among record types, common field checking, etc., will not count as hours against the scoping table below.

Scripting hours may be also used, as requested by the County, to support the County's use of the Construct API (Accela application programming interface) configured as part of Phase I for activities such as, but not limited to:

- Creating new ACA users and associating them with converted records following data conversion
- Associating existing ACA users with converted records following data conversion
- Updating workflow tasks and record status in converted records to match the current workflow state of each record

Phase II Scripting hours: 804 hours

Accela Responsibilities:

- Work with the County to identify potential uses of scripting and prioritize where Accela-developed scripts would be most valuable
- Provide responses to the County's request for information
- For Record Types that Accela is responsible for developing:
 - Provide a list of required scripts based upon customization requests received by the County and work with the County to determine priority
 - Create the Business Process Validation and Automation Specification Document that defines functionality of each script to be developed by Accela. This document can be used in the future for the County to later develop and modify additional functionality as needed
 - Develop and unit test scripts assigned to Accela based on the specifications and priorities and meeting the minimum standards for Section 508 Amendment to the Rehabilitation Act of 1973 to ensure public facing contents generated from these scripts is accessible to individuals with disabilities
 - Demonstrate that scripts developed by Accela function as articulated in the Business Process Validation and Automation Specification Document
- Provide a configuration report for all record types that include scripts developed by Accela

County Responsibilities

- Provide timely and appropriate responses to Accela's request for information. Make available the appropriate County key decision makers for work sessions as needed
- Develop and test scripts and all associated documentation for Record Types for which the County is responsible
- Review and prioritize script list based on the County's business needs

- Prioritize desired functionality to decide which scripts Accela will develop
- Verify that each script specification meets the intended business requirement

Deliverable 11: Accela Citizen Access Deployment

This deliverable applies only to Go-Live Grouping IIb, as shown in Table A. Accela will collaborate with the County to develop the Accela Citizen Access (ACA) end user functionality.

Development of the Accela Citizen Access includes:

- Identifying touchpoints where hyperlinks and deep links will be used to link the County website and ACA .
- Setup of text settings, including disclaimers, help text and watermarks
- Setup of security settings.
- Setup of form layout.
- Setup of user registration settings.
- Setup of user rights and permissions.
- Configuring the user views in scope for tasks that can be maintained by use of the general system administrator functions by the County.
- Initial setup of agencies, organizations, and people in scope for tasks that can be maintained by use of the general system administrator functions by the County.
- Configuring agency business objects in scope.
- Initial Setup of agency communications and events in scope for tasks that can be completed by use of the general system administrator functions.
- Initial Setup of automated data processing in scope for tasks that cannot be completed by use of the general system administrator functions
- Setup of workflows in scope.

Accela Responsibilities:

- Collaborate with the County to Configure Accela Citizen Access in Accela Hosted Development and Test environments to incorporate all settings in the above list.
- Work with the County to determine which services to expose to the public via Accela Citizen Access.
- Create configuration specification document and the wireframe specifications document for Accela Citizen Access based on analysis with the County.
- Configure Accela Citizen Access and Unit Test
- Update configuration pending results of County testing
- Demonstrate the operational Accela Citizen Access functionality per the specification document(s)

County Responsibilities:

- Validate that the configuration specification for Accela Citizen Access meets County requirements based on details from the Solution Foundation stage of the project.
- Perform testing of online record types for purposes of validating the configuration.
- Review, provide feedback, and accept the configuration specification document and the wireframe specifications document.

Deliverable 12a and b: Accela Mobile Apps Configuration

Accela will remotely provide up to 40 hours of support for the configuration, testing and deployment of the Accela Mobile Apps for Go-Live Groupings IIa and IIb, as shown in Table A.

Accela Responsibilities:

- Provide up to 40 hours of remote support to the County's requests for information related to installation, configuration, testing and implementation of the Accela Mobile Apps.
- Document hours spent on Accela Mobile Apps, identifying the Accela project team member and activity.

County Responsibilities:

- Implement the Accela Mobile Apps

Deliverable 15: User Acceptance Testing

Three weeks of User Acceptance Testing are planned for Go-Live Grouping IIb, as shown in Table A. Before UAT can begin, all requirements must be completely configured and record types functional from customer submittal through permit issuance, and where included in requirements, must be through inspection, active revisions and complete revision to approved process. Accela must assist the County in the testing and validation of the solution and its readiness to be migrated to production for active use and must transfer the solution and any required data from the Test to the Production environment. Accela must work with the County to develop a User Acceptance Test Plan, which will detail the approach the County will take to conduct UAT, including who, where and when the County will execute the test scripts and how the County will capture the test results. Accela must also deliver an issue log to track the progress of testing.

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

Accela must provide assistance to the County as needed by providing User Acceptance Testing (UAT) support as articulated in the approved UAT Plan. Accela must address and rectify issues with Accela-developed functionality discovered during the UAT process as County staff executes testing activities. Accela must also update any relevant documentation related to rectified issues.

Before the County can accept this deliverable, Accela and the County must deliver a fully tested system, with no Severity 1 or Severity 2 defects as defined below that is ready to move to production for Go-Live for Go-Live Grouping IIb, as identified in Table A.

Accela Responsibilities:

- Assist the County in creating the User Acceptance Test Plan for each Go-Live Grouping identified in Table A.
- Support and rectify issues for up to three (3) weeks of User Acceptance Testing effort
- Resolve all Severity 1 and Severity 2 Defects (as defined below within this Deliverable, by Severity Levels 1 – 4) resulting from County User Acceptance Testing activities of Accela-developed functionality
- Update any relevant documentation and/or user manuals related to rectified issues

County Responsibilities:

- Provide responses to Accela's requests for information.
- Create the User Acceptance Test Plan with input and recommendations from Accela
- Lead the User Acceptance Testing effort
- Make available the appropriate County key users and content experts to participate in UAT.
- Develop all User Acceptance Test scripts

A "Defect" is defined as a condition in which the software does not meet a requirement (as stated in the approved specifications) or end-user expectations. Defects are categorized into Severity Levels as follows:

"Severity" Level 1 Defect

This is a problem that prevents Arlington County from continuing its business. A Level 1 Defect may have one or more of the following characteristics: (a) a critical function of the Application / Device is not available; (b) the Application/Device hangs indefinitely and/or causes other Arlington County applications to hang; (c) the Application / Device crashes and/or causes other Arlington County applications to crash; and/or (d) a security incident has occurred or is suspected to have occurred.

"Severity" Level 2 Defect

This defect may have one or more of the following characteristics: (a) the performance, functionality or usability of one or more of the Application/Device's parts is severely degraded; (b) multiple users are impacted; and/or (c) one or more business functions are unavailable or unusable by the end users.

"Severity" Level 3 Defect

This is a failure of a system or part that has a minor impact on an agency business process and can be handled on a non-immediate basis. Examples may include user requests (e.g., a report is not formatted correctly) and peripheral problems (e.g., output fails to print properly).

"Severity" Level 4 Defect - This is a cosmetic defect and does not impact functionality

Deliverable 16a and b: Production Support

The Production Date is the official date in which Accela Automation moves from the Test environment to Production for daily County usage. The parties will agree on this date at Project Initiation (see Deliverable 01) for each Go-Live Grouping IIa and IIb identified in Table A. Accela also must provide two staff for up to the three days prior to Go Live for Go-Live Grouping IIa and IIb, to provide support for each Go-Live Grouping. The definition of Go Live is that the Accela software is up and running in the Production environment and the Production system is being used by the County for public transactions. When the County Goes Live it is deemed to have accepted the product. Go Live will occur for each Go-Live Grouping.

Accela Responsibilities:

- Create and maintain a Pre-Production checklist that details the critical tasks that must be accomplished prior to moving to Production, with assistance from the County.
- Provide on-site resources for the three days prior to go live to support the move to Production effort, including support for moving record types developed by Arlington into Production.

- With assistance from the County, lead the effort to transfer the system configuration and any required data from Test to Production.
- Setup integration points in Production for all completed interfaces
- Execute final successful data conversion run during cutover to include all historical data from Deliverable 04/05
- Configure up to 40 security roles total for both Phases in Production environment

County Responsibilities:

- Provide technical and functional support to the County's end-users for pre-and post-Production Planning, execution, and monitoring.
- Provide responses to Accela's request for information.
- Assist in the development of the Pre-Production checklist that details tasks that must be accomplished for the County to continue business prior to moving to Production.

The following tasks need to be accepted prior to deliverable acceptance for each Go-Live Grouping

- Accela Automation used in Production environment for County daily use for up to one week without any Severity 1 or Severity 2 defects.
- Go Live

Deliverable 17a and b: Post Deployment Support & Transition to Customer Support

One week of Post Deployment Support is planned for each of Go-live Groupings IIa and IIb. This deliverable is comprised of Final Acceptance and the post- Production support assistance that Accela must provide to address issues and provide consultative advice immediately following the move to Production for daily use. Accela must provide support for up to one week immediately following deployment (Go-Live) for each Go-Live Grouping. Final Acceptance is defined as County turnover to Accela Customer Support for ongoing support and maintenance. This occurs when the week of post Go-Live support has been completed.

Accela must work with the County to address issues identified during this period using a Post Production Issues List that is created by the County with assistance from Accela. This list will be comprised of issues related to the deliverables listed in this SOW, as well as any other issues that the County wishes to track (outside of scope, prior or subsequent Phase, etc.). Accela will be responsible for resolving issues that are Accela responsibilities in Deliverables in this scope of work. The County will be responsible for resolving training issues, functional changes beyond the scope of this Statement of Work, cosmetic changes, and County procedures related to the use of Accela Automation.

Issues are defined in this Deliverable as follows:

- High Issue: A High Issue is an issue for which the system or application is affected and there is no workaround available or the workaround is impractical (e.g. system response is very slow, day to day operations continue but are impacted by the work around).
- Critical Issue: A Critical Issue is an issue for which the system or application is non-functional or seriously affected and there is no reasonable workaround available (e.g. business is halted).

EXHIBIT 1

At the end of the support period, Accela must provide a final copy of the issue tracker to the customer and disable the list. Additionally, a formal meeting will be scheduled with the County, Accela Services Team, and Accela Customer Support. The purpose of the meeting is to transition support of future issues and questions from the Accela Services Team to Accela Customer Support. When this meeting is completed for each Go-Live Grouping, the County will assume full responsibility for the maintenance of the functionality and records in that Go-Live Grouping and will work with Accela support, not onsite Accela resources, to resolve issues or modify/create functionality.

Accela Responsibilities:

- Provide two staff for two weeks immediately following go-live for each Go-Live grouping for post-production support for Accela-developed configuration and components.
- Assist with the identification and tracking of issues for the Post Production Issues List.
- Resolve Critical and High issues as defined above
- Transfer ongoing support of the County to the Accela Customer Support to address any post Production issues that require remediation.

County Responsibilities:

- Provide technical and functional support to the County's end-users for post-production support and monitoring.
- Report production issues in a Post Production List
- Provide responses to Accela's requests for information.

Deliverable 18: Project Management

This deliverable applies only to Go-Live Grouping IIb, as shown in Table A, and is inclusive of Project Manager, Engagement Director and Solution Architect efforts. The County will be responsible for all coordination, scheduling, and resolution of County action items. Accela must provide County information and data required for weekly project configuration meetings (which may be conducted remotely) for follow up with the County. Accela's Project Manager must collaborate with the County's Project Manager in scheduling the needed resources for the meeting. Accela's Project Manager must inform the County's Project Manager what resource types will be needed at the meetings. The County's Project Manager will send out the invitations to the appropriate County staff members to attend the meetings. Accela's Project Manager has responsibility for the meeting minutes and resolution of action items.

Accela project management oversight will include the following activities: Development and management of a Project Plan, Project Schedule, Project Document Management, Project Website Management (SharePoint), Issue Log Management and Escalation, Status Reporting, Change Order Management, resource management, project oversight and quality assurance, and development of Project Charter, completed prior to Amendment 2 as referenced in deliverable DO1 – Project Initiation

Accela Responsibilities:

- Accela Project Manager must issue a weekly Project Plan update to include the following:
 - Changes to the approved MS Project work plan
 - Updates for work started and completed to-date
 - Forecasted material changes to remaining level of effort, execution sequence or activity durations

EXHIBIT 1

- Accela Project Manager must issue a weekly project status report, which is an executive level briefing on following topics:
 - List of tasks completed during the prior week, the upcoming tasks that need to be completed during the following week, the resources needed to complete the tasks, any tasks that are behind schedule
 - Current version of the Project Plan
 - Milestone status, overall project health assessment across work threads.
 - Listing of any issues that may be placing the project at risk (e.g., issues that may delay the project or jeopardize one or more of the production dates and escalated issues and risks.
 - Pending and approved change requests.
 - Project execution metrics and trends.
 - Project sponsor, program manager and technical lead action items.
 - Remaining travel expense budget and number of trips completed
 - Project financial summary
- Accela Project Manager and Engagement Director must participate in Steering Committee Meetings with Arlington County Project Sponsors on a mutually agreed upon schedule and not less than one time per month to assure alignment and communication of risks/issues are clearly communicated.
- Accela Project Manager must collaborate with County Project Manager or his/her designee in the development of the weekly project status report and the master Project Plan updates.

County Responsibilities:

- Support Accela in creating the weekly status report and master Project Plan updates and content.
- Participate and engage in Weekly Project Status Meetings and Steering Committee Meetings

Deliverable 20a and 20b: Security Set-up

Accela will work with the County for each Go-Live Grouping IIa and IIb as shown in Table A to prepare the System's user interface in Development and Test environments for optimal usability according to user rights, roles and security functionality of the Civic Platform.

Accela will work with the technical lead and key decision makers from each department to review the security functionality and identify the appropriate software rights, roles and user groups. Once these groups and access levels have been identified, Accela will configure and document the process for configuring the user groups, up to a maximum of 40 groups. County resources will participate in this process to allow Arlington to complete any additional groups they need and to learn to support the system long term.

Accela Responsibilities:

- Conduct workshops with County technical lead and key decision makers to validate the security needs
- Document user rights, roles and user groups for the County based upon the workshops, and document the process for configuring
- Configure up to 40 user groups total for both Phases based upon the documented roles in Test and Development environments

Deliverable 22: Support for Go-Live Grouping IIc

Accela will provide support for development of Phase IIc on an hourly basis, as requested by the County.

Amend Exhibit B (“Pricing and Payment Schedule”) of the Agreement as follows:

- **Fee Schedule: Delete the “REVISED DETAILED PAYMENT SCHEDULE, Implementation Services Fees” table and replace it with 1 - 6 below:**
1. Accela will provide Services to support the County in completing the deliverables described in Appendix B for Phase II on a Time and Materials basis which will be billed monthly based on timesheets approved by the County. Accela will provide qualified resources to perform services based on the roles identified in Table 2A below and in accordance with a mutually approved project and staffing plan. Throughout the course of the project, one resource may perform multiple roles, and each role may be filled by more than one resource, except where a specific role is articulated in the Statement of Work. Accela has allocated 4,219 hours to this effort which will be billed as incurred for a total not to exceed amount of \$801,610 exclusive of travel expenses.
 2. Accela shall not exceed the total amount without the prior approval of the County and shall not continue to provide services after the total estimate has been reached without a written amendment agreed upon by the parties. Weekly timesheets will be sent to the County by Friday of the following week for sign-off by the County. Invoices will be sent for hours worked every month, based on the approved hours. Invoices are due Net 45 of the invoice date. Except as otherwise agreed by the parties in writing, fees due are quoted and payable in United States dollars, and payment obligations are non-cancelable, and fees paid are non-refundable.

TABLE 2A: STATEMENT OF WORK COSTS

Project Role	Estimated Hours	Hourly Rate	Extended Price
Project Manager	784	\$190	\$ 148,960
Solution Architect	136	\$190	\$ 25,840
Technical Consultant	1,320	\$190	\$ 250,800
Solution Lead	504	\$190	\$ 95,760
Data Conversion Consultant	675	\$190	\$ 128,250
Scripting Developer	800	\$190	\$ 152,000
Total Estimated Hours:	4,219	Total Estimated Costs:	\$801,610

3. Any hours remaining on the project when Accela has completed the scope of this project will not be used for other work without a Change Order from the County delineating the scope. Any hours remaining will expire 3 months after completion of Phase IIc, as described in Exhibit 1 of Amendment 7 and the County will not be invoiced for any remaining hours.
4. Additional implementation Services outside of the scope of services described in Appendix B will be billed at \$190/hour for the remaining one year terms ending December 31, 2021. The hourly rate for implementation services outside of this scope in the five subsequent one year terms

will escalate 3% each year through the year ending December 31, 2026, as shown in Table 4A below.

TABLE 4A: ADDITIONAL IMPLEMENTATION SERVICE COSTS

Contract Year	Term	Hourly implementation Fee outside scope services described in Appendix B
4	Jan 1 – Dec 31, 2020	\$190
5	Jan 1 – Dec 31, 2021	\$190
6	Jan 1 – Dec 31, 2022	\$195.70
7	Jan 1 – Dec 31, 2023	\$201.57
8	Jan 1 – Dec 31, 2024	\$207.62
9	Jan 1 – Dec 31, 2025	\$213.85
10	Jan 1 – Dec 31, 2026	\$220.26

5. TRAVEL EXPENSES

Travel expenses will be billed as incurred in accordance with the County's Travel and Expense policy, as shown in Exhibit 2 of Amendment 7.

6. CHANGE MANAGEMENT

The estimated fees for this Statement of Work are predicated on the timely completion of project tasks and Deliverables. All work will be performed at the County's direction. If a change is identified that will impact the project approach, timeline, resources or scope, the County and Accela Project Managers will invoke the Change Management process to determine the impact to the project budget. Accela will then issue a Change Order Template (see Appendix C) with the proposed change. The County will subsequently prepare an amendment to the contract and such amendment will be executed by both parties before any change order takes effect.

- **Delete the following paragraph, and replace with "Reimbursable Travel" attached as EXHIBIT 2 of this amendment:**

Delete: "Accela will provide on-site personnel as needed for a minimum of 277 days and up to 257 days total across both Phases I and II for Deliverables 01-21 at the cost of \$400.10 a day, for a maximum total of \$110,827.70. One day equals one person on-site for one day, including travel days if the personnel conducts on-site work the same day as the travel. On-site visits by the Project Executive(s) do not count against this total. Accela will bill the County only for travel days completed."

V. Amend Section 46 ("Notices") as follows:

Replace "Michael E. Bevis" with "Sharon Lewis"

REIMBURSABLE TRAVEL-RELATED EXPENSES

The County will not reimburse the Contractor for travel-related expenses for employees located within the greater Baltimore-Washington Metropolitan Area, as defined by the United States Office of Management and Budget. For employees located outside this area, the County will reimburse for pre-approved travel-related expenses, documented with receipts, as follows:

Meals: The County will reimburse at the U.S. General Services Administration's ("GSA") per diem rates for the destination, current for the date of travel, with the first and last days of travel counted at 75% of the per diem rate.

Lodging: The County will reimburse for actual lodging costs at a reasonably priced commercial facility in the immediate area of where the Work is performed, up to the GSA's daily rates for the destination, current for the date of travel. Receipts for lodging must be itemized. Only room and tax charges will be reimbursed; no reimbursement will be made for additional expenses, including but not limited to, room service, laundry, telephone and in-room movies. If the Contractor or its employee shares a room with another person who is not connected with the performance of the Work, including a spouse, the County will reimburse for only the cost of a single room.

The applicable GSA per diem rates can be obtained at <http://www.gsa.gov/portal/content/104877>.

Transportation:**General**

Reservations must be made in advance whenever possible to take advantage of all available discounts.

Ground Transportation

Use of public transportation is encouraged. The County will reimburse for the business use of personal or company vehicles, if allowed, at the GSA's mileage rates current at the time of travel. The Contractor's request for reimbursement may not include any personal use of the vehicle.

The County may approve reimbursement for rental of vehicles or use of taxicabs if the Contractor can demonstrate that to be the most economical option. Any reimbursement will cover only those rental charges, insurance and/or fuel fees allocable to work on the Contract and will not cover the purchase of liability insurance and/or collision/comprehensive insurance if the Contractor's or the employee's existing insurance coverage provides such protection.

Air Travel

The County will reimburse for air travel at the lowest available fare, typically economy. Tickets must be purchased at least seven days in advance, unless otherwise approved by the County.

Time limit: The County will not honor requests for travel reimbursement that are submitted more than 60 days after completion of the travel.

Non-reimbursable Expenses: The County will never reimburse for the following expenses:

EXHIBIT 2

1. Alcoholic beverages
2. Personal phone calls
3. Entertainment (e.g. pay TV, movies, night clubs, health clubs, theaters, bowling)
4. Personal expenses (e.g. laundry, valet, haircuts)
5. Personal travel insurance (e.g. life, medical, or property insurance) for airfare or rental cars
6. Auto repairs, maintenance and insurance costs for personal vehicles

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