

**ARLINGTON COUNTY, VIRGINIA
AGREEMENT NO. 530-15**

AMENDMENT NUMBER 2

This Amendment Number 2 ("Amendment") is made on the date of execution by the County and amends Arlington County Agreement Number 530-15, dated March 29, 2016, ("Agreement") and made between Accela, Inc., 2633 Camino Ramon, Suite 500, San Ramon, CA 94583 ("Contractor"), a California corporation authorized to transact business in the Commonwealth of Virginia, and the County Board of Arlington County, Virginia ("County").

Whereas the County and the Contractor desire to amend the Terms and Conditions of the Agreement, the County and the Contractor, in consideration of the promises and other good and valuable consideration specified in this Amendment, amend the Agreement as follows:

1. Amend Exhibit A ("Statement of Work: Arlington County Integrated Permitting and Land Management System") as follows:

Replace Section 2.2 Implementation Methodology with the following:

Accela Implementation Methodology

Initiation and To-Be Analysis Stage (Completed in June 2017)

1. During Initiation, the parties will engage in project planning activities, will create and review project management documents and templates and will conduct the first on-site meetings. The objective of these meetings is to review the purpose of the project and formally present and discuss the scope, roles and responsibilities, Deliverables and timeline.
2. The To-Be Analysis stage will define the Accela Civic Platform for the County. The resulting To-Be Analysis document will be the blueprint for System design and baseline configuration and will establish the criteria for System testing and acceptance. The To-Be Analysis sessions and To-Be Analysis document will cover detailed information about the County's business processes, broken down by Record Type. Each Record Type will be further defined by the following topics, including employee names and associated roles for each step of the business process:
 - Business process overview
 - Intake requirements
 - Review activities
 - Issuance requirements
 - Inspection types, scheduling and checklists
 - Workflow and processing requirements
 - Fee types, processing and schedule
 - Citizen portal (Accela Citizen Access) specific to online submittal, inquiry, inspection scheduling and fee payments
 - Electronic document review and markup

DEFINE STAGE

The Define stage will set the stage for how the project will be managed throughout the project life cycle. Given the status of the County implementation, this stage will be abbreviated as much of this work has been completed.

In this stage, there are two key tasks that will take place:

1.1.1 Project Set-up - The Project Manager will set-up the Project SharePoint site, assign resources to the project (resource management), refine the Project Charter dated September 2, 2016 based on the Statement of Work, and refine the Project Plan and Project Management Plan. This task was completed prior to Amendment 2.

1.1.2 Project Kick-off - This task sets the expectations for our customer and the key stakeholders on what's going to occur during the project life-cycle. Accela recommends that the Regional Director, the Project Manager, the Implementation Lead and the Solution Architect be involved in delivering the presentation. This task was completed prior to Amendment 2.

The key deliverables supporting this stage of the methodology include:

Deliverable Name	Description of Deliverable	Deliverable Owner
Project Management Plan Updates	<p>The Project Management Plan deliverable consists of four key work products that will be used to manage the project throughout the project life cycle. They include:</p> <ul style="list-style-type: none">• Project Schedule – to be updated during the Project Initiation Deliverable (01)• Project Management Plan - This document captures how the project will be managed from governance, to the methodology, that includes risk management, issue management, tracking• Status Report Template – this task was completed prior to Amendment 2.	Project Managers

REFINE STAGE

There are seven key activities that occur in the Refine Stage:

1.2.1 Initial Training - This begins the knowledge transfer between Accela terminology and the gap analysis workshops overview

1.2.2 Accela Add-on Component set-up - Setting up the additional add-on components acquired by the County, such as Accela Citizen Access, Accela Mobile Applications, Accela GIS, and Electronic Document

Review System. The set-up of these components will support the Refine Conference Room Checkpoint where the County will gain a high-level understanding of its solution.

1.2.3 Data Conversion Knowledge Transfer - The Technical Consultant will assist the client in mapping identified source systems and identify any areas where scripting is needed to convert the data.

1.2.4 Gap Analysis - The Gap Analysis will demonstrate to the County the solution developed with the County during Analysis and work sessions during the prior phase of the project (September 2017 – May 2017) . At the end of the Gap Analysis workshops the core configuration will be completed and the Agency will understand their solution.

1.2.5 Points of Integration- The points of integration are those third-party systems that will integrate with the Accela Civic Platform to support the Agency's implementation.

1.2.6 Conference Room Checkpoint - At the end of the Refine stage, the team will walk the County through its solution at a high-level to provide the County will a clear understanding of what has been built to date

1.2.7 Prepare Test Plan - The Accela Implementation Lead and County will amend the Test Plan created by Accela to support the County's implementation; the Test Plan will focus on User Acceptance Testing process. Providing the County with a plan to conduct its UAT, who should participate, what should be tested, how to report an issue, and retesting issues that were fixed. The County will begin to develop test cases during this stage.

DEVELOP STAGE

There are six key activities that occur in the Develop Stage:

1.3.1 Automation and Validation - The package solutions will include automation and validation; the automation and validation will support flexibility in the Agency's development based on criteria to support the existing business rules.

1.3.2 Report Verification - The reports will support flexibility in the Agency's development based on data and format to support the existing report.

1.3.3 Data Conversion Iterative Mocks – The County will map the legacy data to the Accela source location based on the grouping to address any issues in an iterative process building on each mock with new data features. Any necessary scripting will be done by the County.

1.3.4 Build Points of Integration - The Accela Technical Consultant will develop the code and perform unit testing on the interfaces that were designed in the Refine Stage. The County will confirm the functionality.

1.3.5 Conference Room Checkpoint - Once the Automation and Validation, Report Verification, Data Conversion of the interactive mocks and Build Points of Integration for the group has been completed, the team will walk the County through its solution at a high level. A Conference Room Pilot Checkpoint Meeting will be scheduled after the completion of the core configuration from each Gap Analysis Workshop – See 1.2.4. covering the record type(s) covered during the subject workshop.

1.3.6 Data Conversion Functional Mock - The Accela Technical Consultant will perform dry-runs of the production run to validate all mini-mocks have been accounted for and that all determined data supporting the production conversion run is being converted successfully.

DEPLOY STAGE

There are five activities that occur in the Deploy Stage:

1.4.1 Execute User Acceptance Testing - The County will be responsible for executing the UAT with Accela's support in troubleshooting and fixing issues that come up. The Accela team should retest any issue once it's been fixed prior to sending back to the Agency for testing.

1.4.2 Conduct End User Training - The Accela team will provide train-the-trainer training to the County in preparing their staff/end users with how the system will support its business process. The County will be responsible for training its end users.

1.4.3 Execute Cutover Plan - The Accela Solution Architect, Accela Project Manager and the Accela Implementation Lead will identify tasks that will need to support the County's s cutover to production. The Cutover Plan will begin during the Data Conversion Functional Mocks and a template will be modified to support the migration/conversion to production.

1.4.4 Post Production Support - Once the County has gone live, Accela will for the period set forth in the Post Deployment Support Deliverable (17) below, support/address any production issues that are identified based on the SOW.

1.4.5 Transition to Customer Support - The Accela Project Manager will work with Accela Customer Support in the transition from project life-cycle to support.

Replace Section 2.3 Deliverables and Timeline with the following

DELIVERABLES AND TIMELINE

The project is to be delivered (go-live) in two Phases, whereby 32 record types will be included in Phase I and 39 record types will be included in Phase II and fully functional in the Production environment and transferred to Accela Customer support at the end of each Phase. The specific record types included in each Phase are identified in Table A (see Deliverable 03). The table below provides a list of the project Deliverables, which are detailed in Appendix B. Except where explicitly identified, each Deliverable will be completed for each Phase, such that the go-live for each Phase includes full system functionality as described in this document. Project durations and number of trips for each deliverable will be decided by both Accela and the County during deliverable 01 - Project Initiation Phase.

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

Define	01	Project Initiation
Refine	19	OnBase EDR and EDMS Integration
	02	AMD2: Record Type Finalization
	03	AMD2: Record Type Gap Analysis
	04	Historic Data Conversion Analysis
	06	Interface Analysis and Development
	07	EDR Analysis
	08	Selectron IVR-Interactive Voice Response System Interface
	12	Accela Mobile Deployment
Develop	21	GIS Deployment
	05	Historic Data Conversion Development
	09	Business Process Validation and Automation (Scripting)
	10	Report Specifications and Development
	11	Accela Citizen Access Deployment
	20	Security Setup
Deploy	13	Administrative Training
	14	Train the Trainer
	15	User Acceptance Testing
	16	Production Support
Manage	17	Post Deployment Support & Transition to Customer Support
	18	Project Management – Phase 1: 13 months, Phase 2: 11 months
	24	Project Management (To-Be Analysis stage) – complete prior to Amendment 2.

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 GIS activities outside of those activities required to complete Deliverable 21: Accela GIS Deployment, will be solely managed by the County
- 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.)
- 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.
- 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 is managed using Microsoft Project. Should any tasks slip behind schedule ten (10) business days, Accela and County will escalate according to the Escalation Plan in the Project Charter and invoke the Change Management process.
- 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 must support the remaining testing processes in each Phase, correcting defects based upon expected functionality captured in Accela's response to the permitting and technical specifications and approved in the To-Be Analysis Document.

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 payment deliverable, Accela must provide the County with the Accela Deliverable Acceptance Form to formalize acceptance and completion. The Deliverable Acceptance Form is subsequently signed by the appropriate County contact, as defined in the Project Charter, and faxed / scanned / emailed / hand 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.

Change Management

If a change is identified that impacts performance of the Services, but does not require a contract amendment, the County Project Manager and Accela Project Manager must invoke the Change Management process.

Replace Section 3.2 Accela Personnel with the following:

Project Key Roles

In the Accela Standardization Implementation approach four key roles will share accountability, the *Project Executive*, *Project Manager*, the *Solution Architect*, and the *Implementation Lead*. The table below represents the accountability by role:

Role	Accountability	Responsibilities
Project Executive	The Project Executive will be accountable for providing project oversight and resolving issues and risks throughout the duration of the project	<ul style="list-style-type: none"> - Partner closely with County Sponsors and participate in Steering Committee Meetings - Work closely with Project Sponsor - Assist in removing project execution obstacles
Project Manager	The Project Manager will be accountable for the <u>client relationship</u> , the <u>budget</u> and the <u>project schedule</u> on the project.	<p>The Project Manager will work with the Solution Architect and the Implementation Lead to ensure project tasks and durations can be met and are updated on a regular basis. The Project Manager will:</p> <ul style="list-style-type: none"> • Ensure progress on the project is being communicated on a regular basis, • Manage the project issues and risks • Be the point for escalation • Generate partner subcontracts • Monitor the budget for each workstream on the project and communication to the Solution Architect and Implementation Consultant when a budget is 25%, 50%, and 75% complete
Solution Architect	The Solution Architect will be accountable for the overall <u>technical</u> and <u>quality</u> of the solution on the project.	<p>The Solution Architect will be responsible for:</p> <ul style="list-style-type: none"> • The overall design of the solution • Ensure custom solution packages follow a standard development approach • Provide direction and clarification for <ul style="list-style-type: none"> ○ Interface design and develop ○ Data Conversion activities ○ GIS configuration ○ Scripting and Reports • Perform quality reviews on technical designs • Validate solutions based on designs for unit and system testing

		<ul style="list-style-type: none"> Ensure a high standard is applied to the project
Implementation Lead	The Implementation Lead will be accountable for the <u>standardization</u> and <u>user adoption</u> of the solution on the project.	<p>The Implementation Lead has an in depth understanding of the standard solution packages to support our customer implementations. The Implementation Consultant will be responsible for:</p> <ul style="list-style-type: none"> Adhering to our standardization implementation approach Facilitating analysis based on standard and certified solutions Setting up add-on components such as Accela Citizen Accela, Accela Mobile Applications, and Electronic Document Reviews to support the user experience Conduct system testing and identifying issues Supporting the User Acceptance Testing activities
Technical Consultant(s)	<p>Data Conversion Consultant</p> <ul style="list-style-type: none"> Review data conversion approach and Deliverable expectations Develop data conversion data map Build and Unit Test, smallest testable parts of an application are scrutinized for proper operation, data conversion program Execute and support data conversion for testing and go-live <p>Interface Consultant</p> <ul style="list-style-type: none"> Conduct Interface analysis sessions with the County Develop data integration specifications for importing or exporting data from the Accela Civic Platform Build and Unit Test data integration programs <p>Report Consultant</p> <ul style="list-style-type: none"> Manage and assist in the development of report specifications Manage and assist in the development of reports Manage and assist in Unit Testing reports Manage report deployment <p>Scripting</p> <ul style="list-style-type: none"> Manage and assist in the development of scripts specifications Manage and assist in the development of scripts Manage and assist in Unit Testing scripts Manage script deployment <p>AMO</p> <ul style="list-style-type: none"> Manage and assist in the development of Accela Mobile Office (AMO) specifications Manage and assist in the development of AMO configuration 	

	<ul style="list-style-type: none"> • Manage and assist in Unit Testing AMO configuration • Manage AMO deployment <p>GIS</p> <ul style="list-style-type: none"> • Manage and assist in the development of GIS specifications • Manage and assist in the development of GIS configuration • Manage and assist in Unit Testing GIS configuration • Manage GIS deployment <p>Accela Cloud Environment Lead Install and set up Accela Civic Platform</p>
Training consultant	Deliver Accela Training Classes

Replace Appendix B – Stages, Deliverables and Tasks in its entirety with the following:

DELIVERABLE DESCRIPTIONS, SCOPE and ACCEPTANCE CRITERIA

Deliverable 1: Project Planning and Documentation (completed in June 2017)

Accela’s Responsibilities:

- Finalize staffing for the Accela project team.
- Conduct on-site kickoff meetings.
- Provide the project status report template.
- Finalize and document Deliverable sign-off procedures;
- Develop a Project Charter that defines how the project will be governed, including a detailed escalation plan.
- Finalize a baseline Project Plan that includes resource allocation for all tasks.
- Create the project SharePoint site and load and share standard, current documentation.
- Conduct training in order to prepare the SMEs for the To-Be Analysis stage.
- Develop a communication plan
- Develop a risk and issue management plan

County’s Responsibilities:

- Finalize staffing for the County project team
- Provide meeting facilities for project kickoff and other on-site activities, including training.
- Identify County team members who will be responsible for Deliverable sign-off.

The following tasks need to be completed prior to Deliverable acceptance:

- Project kickoff presentations
- Project Charter
- Baseline Project Plan
- Project Status Report template
- Project SharePoint site
- Course 1 – Civic Platform Core Team training (2.5 days)
- Communication plan

- Risk and Issue Management Plan

Deliverable 2: Accela Civic Platform Cloud Setup (completed in June 2017)

Accela Responsibilities:

- Set-up the support and staging environments in the Accela Cloud.
- Perform a remote system check of the system.
- Demonstrate that the Accela Civic Platform is operational.

The following task needs to be completed prior to Deliverable acceptance:

- Demonstration of an operational Accela Civic Platform environment, meaning that the County can successfully log into the Accela environment with the administrative account.

Deliverable 3: To-Be Analysis Sessions (completed in June 2017)

Accela's Project Manager will coordinate the To-Be Analysis sessions in conjunction with the County Project Manager and according to the Project Plan. Accela will conduct the To-Be Analysis sessions and capture pertinent information for each Record Type. Prior to the sessions, the County will provide documentation describing current business processes and standard data used to complete a transaction. For the analysis, the County will select five Record Types for Accela to demonstrate how the System functionality could operate for the County.

Accela's Responsibilities:

- Review County information.
- Interview County staff in order to understand existing business processes.
- Conduct To-Be Analysis sessions and other meetings as necessary to document business process information that will be automated within the System.
- Build selected prototypes to demonstrate proposed functionality.
- Demonstrate prototypes.

County Responsibilities:

- Provide existing business process documentation, including process flows, fee schedules, commonly used applications, reports and forms and other relevant information.
- Select five Record Types to be demonstrated.

The following tasks need to be completed prior to Deliverable acceptance:

- Review and understand existing business processes intended for configuration in the System.
- Assist the County in streamlining existing business processes for fit into the System.
- Collect employee names and associated roles and identify user group setups.
- Review the document intake requirements, forms, and data fields for each process.
- Review the document output requirements (documents/letters/reports) for each process.
- Review the document fees, fee schedules, and collection procedures for each process.
- Review the document inspections and inspection result options for each type.

Deliverable 4: To-Be Analysis Document (completed in June 2017)

Accela will develop the To-Be Analysis document based on the To-Be Analysis sessions.

Accela Responsibilities:

- Complete To-Be Analysis document capturing the County's business processes to be included in the Solution Foundation.

The following task needs to be completed prior to Deliverable acceptance:

- To-Be Analysis document.

Deliverable 01: 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.

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 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 02: Record Type Finalization

County to identify changes to the Solution Foundation based on a review of the Session Notes completed during the March-June 2017 timeframe and hands-on review of the system for the record types listed in Table A; and Accela to finalizes changes based on the Session Notes and finalized change list provided by the County.

Accela Responsibilities:

- Review final change list that County publishes in SharePoint and review with County to clarify changes identified and identify resolution to any issues
- Apply changes to configuration as per the Session Notes and with changes identified in the finalized change list and functionality identified in completed Deliverable 19 OnBase EDR and EDMS Integration
- Provide Configuration Report for each record for each Phase, reflecting completed configuration as identified in above bullet

County Responsibilities:

- Review and confirm accuracy of previously completed Session Notes for all record types
- Create a change list from the above review of Session Notes and publish in SharePoint. The change list will identify changes required to the previously built Solution Foundation configuration that was based upon initial review of the completed Session Notes. The change list will be provided to Accela for review not later than either two weeks from the project start date or March 15, 2018, whichever is later, for Phase I; and no later than two weeks from Phase II project start date for Phase II). A change order may be required if actual task/development duration to implement any individual change on the change list is over 80 hours.
- Review and approve system configuration as per the Session Notes, finalized change list, and functionality identified in completed Deliverable 19 OnBase EDR and EDMS Integration
- Confirm Configuration Report reflects approved configuration
- 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.

Deliverable 03: Record Type Gap Analysis Workshops

Accela will conduct Gap Analysis Workshops for up to 6 hours per record type to prepare the County for the Gap Analysis sessions covering all record types listed in Table A. The Gap Analysis Workshops will cover all record type configuration requirements to meet the overall Accela Civic Platform solution and will include the following:

- 1) Review Approved EDR functionality
- 2) Fees will be finalized, confirm calculations required for each fee in the record type.
- 3) Scripting specifications will be finalized and stored within a SharePoint list
- 4) Identification by the County, of Reports required
- 5) Inspections (if necessary for the record)

Accela will document in SharePoint the following:

- 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

After the session is complete, the County will confirm that the documentation provided accurately reflects the information provided for Fee Calculations, Scripting, and Inspections/Guidesheets.

Accela Responsibilities:

- Provide responses to County's request for information.
- Document fee calculations, scripting specifications and Inspections/Guidesheets functionality in SharePoint as listed above, for review by the County
- Update all record types with all agreed-to configuration changes and provide the County with the Configuration Report for each record type reflecting all changes.
- Conduct a Conference Room Checkpoint for County staff to see an overview of the system using the five representative records reflecting all agreed to configuration changes

County Responsibilities

- Provide responses to Accela's request for information.
- Make available the appropriate County key decision makers for work sessions as needed
- Review and confirm the notes provided for each work session

TABLE A - RECORD TYPES IN SCOPE

	PHASE 1		PHASE 2	
	Department	Record Types	Department	Record Types
1	CPHD/HP	Certificate of Appropriateness	DES	Land Disturbing Activity
2	DES	Administrative Fee - DES	DHS	DHS Complaint
3	DES	Block Party	ISD	Amusement Device
4	DES	CEP	ISD	Asbestos
5	DES	Haul Route	ISD	Building Code Compliance or Code Enforcement Appeal
6	DES	Motor Coach	ISD	Building Code Modification
7	DES	Moving Van/Container	ISD	Building Demolition
8	DES	Public ROW	ISD	Building Permit - Commercial Complexity 1
9	DES	PROW/TROW Project	ISD	Building Permit - Commercial Complexity 2
10	DES	TROW w/excavation	ISD	Building Permit - Commercial Complexity 3
11	DES	TROW w/o excavation	ISD	Building Permit - Commercial Complexity 4
12	ISD	Administrative Fee - ISD	ISD	Building Permit - Residential Complexity 1
13	ISD	General Consultation Review	ISD	Building Permit - Residential Complexity 2
14	ISD	New Address	ISD	Building Permit - Residential Complexity 3
15	Planning	Concept Plan	ISD	Building Project
16	Planning	FBC New Use Permit	ISD	Certificate of Occupancy: Change of Ownership
17	Planning	FBC New Administrative	ISD	Certificate of Occupancy: Commercial Master Residential Master, Shell and Core, Temporary CO
18	Planning	GLUP Amendment w/Study	ISD	Certificate of Occupancy: Short Term
19	Planning	Landscape Plan	ISD	Electrical Permit
20	Planning	Rezoning	ISD	Elevator
21	Planning	Site Plan New	ISD	Elevator Periodic Inspection
22	Planning	Use Permit New/Amendment	ISD	Code Enforcement Complaint
23	Planning	Use Permit Public Facility	ISD	Fire
24	Planning	Use Permit UC/MUD	ISD	Fuel Gas
25	Planning	Use Permit URD	ISD	Mechanical Permit
26	Zoning	Additional Sink	ISD	Periodic Inspection Cross Connection (Plumbing)
27	Zoning	Accessory Homestay	ISD	Plumbing
28	Zoning	Administrative Fee - Zoning	ISD	Snow Removal Complaint
29	Zoning	Home Occupation/Food Prep	Multi	Enforcement Case
30	Zoning	Zoning Compliance Letter	Multi	Proactive Inspection - ISD
31	Zoning	Zoning Determination Letter	Zoning	Accessory Dwelling Unit
32	Zoning	Zoning Response Letter	Zoning	Administrative Change
33			Zoning	Board of Zoning Appeals
34			Zoning	Board of Zoning Appeals Use Permit / Variance
35			Zoning	Dance Hall Permit
36			Zoning	Family/Caregiver Suite
37			Zoning	Fence
38			Zoning	Sign
39			Zoning	Zoning Complaint

Deliverable 04: Historic Data Conversion Analysis

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. Plan review records 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 Customer Data	Customer data SQL database

- 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. for each record analysis and mapping documents for each record type.
- 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
- 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 05: 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.

Accela Responsibilities:

- Develop and unit test the programs to migrate historical data in the Accela Civic Platform
- 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.
- 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.

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.

Deliverable 06: Interface Analysis and Development

For each interface, the Accela technical lead must work together with the County's technical lead and business leads to document functional and technical requirements of the interface in an Interface Specifications Document. Interface development begins upon written approval of the specifications. No custom or third-party integration tool will be used to accomplish input or output of data to/from the Accela system. . Apart from the Virginia State License Database, the County's responsibility includes obtaining permission for level/type of integration from appropriate application owners (including on premises or cloud/hosted, etc.). Further, the County will provide Accela resources with access to a Development or Test version of the third-party system for interface development.

Accela must conduct Interface Analysis and Development (Deliverable 06 A-C) for each system that will be interfaced with Accela within the scope of this implementation.

Phase I only

Deliverable	System Name	Description
06A	ACE	Business License
06B	Oracle Financials – Enterprise County general ledger system	Records all payment transactions in the County's general ledger system. Nightly Batch interface from Accela to Oracle Financials (One Way)
06C	DPOR	Licensed Contractors

Accela Responsibilities for each interface identified in 8A-8C above:

- Provide any needed permissions for level/type of integration from Virginia State License Database (DPOR, as identified in 8C above)
- Conduct interface analysis sessions with County experts for each interface identified in 06A-B above
- Create Interface Specifications Document for use in building the interfaces, with County review and assistance
- Complete integration for each interface in 06A-C above and unit test in Development and Test environments
- Demonstrate operational functionality of each interface
- Conduct Conference Room checkpoint overview of functional points of integration, business processes and completed data conversion

County Responsibilities:

- Assist in interface specification and testing process as needed
- Provide third-party Test and/or Development environments for each interface
- Validate third-party systems and update those systems as required for purposes of interfacing with the Accela Civic Platform

Deliverable 07: EDR Analysis

Accela and the County collaboratively complete a proof of concept of OnBase and Accela product integration. Upon completion of the proof of concept Accela and the County will develop a presentation of the findings to the project sponsors for review and approval to move into a full Accela/OnBase EDR and EDMS Integration.

Accela Responsibilities:

- Participate, and lead as needed, work sessions to review the integration approach between OnBase and Civic Platform for EDMS and EDR functionality
- Jointly with the County, develop a presentation of the components of the integration that is focused on the Accela products
- Participate with County staff in the presentation of the findings to the County Sponsors

County Responsibilities:

- Participate, and lead as needed, work sessions to review the integration approach between OnBase and Civic Platform for EDMS and EDR functionality

- Jointly with Accela, develop presentation for the components of the integration that is focused on the OnBase products
- Participate with Accela in the presentation of the findings to the County sponsors

Deliverable 08: Selectron IVR-Interactive Voice Response System Interface

Accela must remotely provide up to 16 hours of support for the configuration, testing and deployment of the Selectron IVR Accela Adapter.

Accela Responsibilities:

- Provide up to 16 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)

Accela will provide a complete list of custom script requests including the level of effort. The County will review and prioritize the custom script list against the following scoping table for Phase 1 and Phase 2 to determine which scripts Accela will create. The County will provide scripting resources to complete all script scope overages for Phase 1 and Phase 2. 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.

Table 4 – PAYMENT SPLIT BY SCRIPTS COMPLETED

Script Hours	Phase 1	Phase 2	Total Hours
Script Hours	800	250	1050
<p>Monthly Scripts Payments are based on the total amount of scripts completed and unit tested by Accela for the prior month. The total dollar amount for each script will be based on the level of effort, measured in hours provided for each script at the cost-reduced rate of \$169.39 per hour. The rate is a one-time discount.</p>			

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
- Provide a list of required scripts based upon customization requests received by the County

- Provide a level of effort for each custom script for review, prioritization, and assignment direction by the County.
- 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
- 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 10: Report Specifications and Development

“Reports” are defined as anything identified during configuration analysis that can be printed from the system, including but not limited to, reports, forms, documents, notices, and letters. Accela will classify the reports by level of complexity: high, medium, and low. High is defined as a report containing significant calculation and/or extensive detail and number of fields – for example a financial statistical report or complex permit. Most reports require a ‘medium’ level of effort, which is defined as a report displaying non-calculated and minimal calculated data fields. Reports with a low level of effort are typically letters or notices that contain contact information and basic application data.

Accela will develop reports from the list identified by the County based on the following breakdown:

Phase 1: Report Specifications and Development

- Two (2) High Complexity Reports
- Ten (10) Medium Complexity

Phase 2: Report Specifications and Development

- One (1) High Complexity Report
- Six (6) Medium Complexity

Prior to the development of each report for which the County does not provide a sample, the County will approve a Report Design Specification document that it will create jointly with Accela. The approved Report Design Specification documents will be used as a basis for determining completion and approval of the reports.

Accela Responsibilities:

- Determine complexity of each report and assist with the report specification and development assignment to either Accela or the County
- Develop Report Specification Documents for each report assigned to Accela that does not have a report sample
- Develop and unit test all reports assigned to Accela
- Provide access to a comprehensive data dictionary including all tables and columns in the database for use by the County to develop reports assigned to the County to complete.
- Provide completed reports assigned to Accela consistent with functionality identified in either the sample report provided by the County or the Report Specification Documents, as appropriate

County Responsibilities:

- Provide responses to Accela's request for information.
- Make available the appropriate key users and content experts to participate in developing the Report Specifications.
- Develop list identifying which reports Accela must develop and which reports the County will develop.
- Verify that each Report Specification Document meets the intended business requirement.
- Test the reports developed by Accela
- Review, provide feedback, and approve Report Specification Documents and Accela-developed reports.
- Make available the appropriate resources to write reports specifications and develop reports assigned to the County to complete prior to go-live.

Note: The County will not withhold acceptance of this deliverable if changes are requested to the report specifications after the County signoff on the specifications. It will be the responsibility of the County to implement any changes not reflected in this Amendment and the report specifications at the time of signoff.

Deliverable 11: Accela Citizen Access Deployment

Accela will collaborate with the County to develop the Accela Citizen Access (ACA) end user functionality. The County will provide / purchase / acquire an online merchant account and all related hardware required by the merchant account provider for the handling of credit cards and / or checks for usage on Accela Citizen Access.

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.
- Setup of the online payment interface (i.e., Virtual Merchant)..
- 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.
- Assist County in set up and validation of merchant account integration using the Accela Virtual Merchant Payment Adapter.
- 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:

- Obtain a merchant account, and deploy an internet-enabled payment engine.
- 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 12: Accela Mobile Office Configuration and Deployment

Accela must configure the Accela Civic Platform to leverage Accela Mobile (Accela Mobile Office and Mobile Apps). As part of this deliverable, Accela must perform the configuration tasks required to ensure Accela Mobile interfaces with Accela Automation in both a Test and Production environment.

Analysis activities with the County will result in a Mobile Office Configuration Specifications Document. Accela's staff must extend base configuration of Accela Mobile Office per the Mobile Office Configuration Specifications Document.

Accela Responsibilities:

- Create, review and update Accela Mobile Office Configuration Specifications Document for Accela Mobile Office based on analysis with the County.
- Configure and deploy Accela Mobile Office base configuration based on approved Accela Mobile Office Configuration Specifications Document.
- Demonstrate operational system consistent with Accela Mobile Office Configuration Specifications Document requirements
- Unit Test.

County Responsibilities

- Review and provide feedback on Configuration Specifications Document.
- Test Accela Mobile Office to validate base configuration based on approved Configuration Specifications Document.

Deliverable 13: Administrative Training

Accela must provide training for County staff that focuses on the administration, maintenance, and augmentation of its Accela Automation configuration. Accela will develop a Training Plan that educates County resources on all aspects of Accela Automation included in the courses listed below, to ensure that the County is self-sufficient and to enable the County to best react to changing requirements and reduce system maintenance costs over time.

All Accela-led training classes that are 1 day or more will be conducted at County facilities unless otherwise agreed to be conducted remotely. Classes less than 1 day can be conducted remotely.

The following courses will be executed for this deliverable:

- | | |
|--------------------|---|
| ➤ 1 each Course 1 | Civic Platform Core Team – COMPLETED 10/2016 |
| ➤ 1 each Course 2 | Civic Platform Admin Usage (3.5 days) |
| ➤ 1 each Course 6 | Civic Platform Database Schema Fundamentals and Report Manager (.5 day) |
| ➤ 1 each Course 7 | Civic Platform Event Manager Scripting Usage - Beginner (1 Day) |
| ➤ 1 each Course 8 | Civic Platform Citizen Access Administration (1 Day) |
| ➤ 1 each Course 9 | Civic Platform GIS Administration (.5 Day) |
| ➤ 1 each Course 14 | Civic Platform Ad Hoc Reporting (4 hours) |

Accela Responsibilities:

- Coordinate with the County to define training schedule and logistics.
- Deliver the specific courses listed above.
- Create, review and update the Training Plan.
- Provide training documentation and manuals

County Responsibilities:

- Select and prepare up to 30 users who will be participating in the training and subsequently training end users.
- Identify up to 30 County resources who will receive the training.
- Provide County facilities to accommodate the training classes.
- Ensure that users are proficient in using PC's in a Windows environment as a prerequisite for the course.
- Ensure that users are familiar with use of standard internet browsers as a prerequisite for the course.
- Review and provide feedback on the Training Plan, including relevant scheduling information to inform training timelines.

Deliverable 14: Train the Trainer

The 5-day Train-the-Trainer course is based upon the accepted Training Plan for up to 15 participants and is the only end user training provided by Accela. The County will provide all other end user training, including training logistics, training scheduling, and the printing of training materials. The County will provide and/or otherwise enter training environment data; The County also will provide the training room and hardware (PC's, Monitors, etc.), software (Internet Explorer, Adobe Pro, etc.) and supporting equipment (Projector, whiteboard, etc.) required in the training room for delivery of Train-the-Trainer and other end user training.

Accela Responsibilities:

- Coordinate with the County regarding training schedule and logistics.
- Provide 5-day Train-the-Trainer course sessions.
- Perform verbal post-training evaluation meeting(s) to ensure County staff has the necessary information to conduct training for County staff.
- Create the custom training manuals and materials.
- Review, update and finalize the custom training manuals and materials in response to County feedback

County Responsibilities:

- Identify the County resources who will receive the training and who have the skills to perform as trainers.
- Provide a training room at the County facilities to conduct the training classes.
- Ensure that users are proficient in using PC's in a Windows environment as a prerequisite for the course.
- Ensure that users are familiar with use of standard internet browsers as a prerequisite for the course.
- Review, provide feedback, and sign-off on specified custom training manuals and materials.

Deliverable 15: User Acceptance Testing

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 up to four (4) sample test scripts, as well as an issue log to track the progress of testing. All other test scripts required for testing will be created by the County. This deliverable will be completed within a total of four (4) weeks for each Phase.

At this point in the implementation process, the County should 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 and a defined testing process through provision of the User Acceptance Test Plan. Accela must address and rectify issues discovered during the UAT process as County staff executes testing activities. Accela must also update any relevant documentation and/or user manuals related to rectified issues.

Before the County can accept this deliverable, Accela 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 each Phase.

Accela Responsibilities:

- Assist the County in creating the User Acceptance Test Plan for each Phase, and provide recommendations on testing strategy and best practices. Provide four (4) sample test scripts for each Phase, and review and updated based on County feedback
- Lead the County in up to four (4) 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
- Update any relevant documentation and/or user manuals related to rectified issues

County Responsibilities:

- Provide responses to Accela's request for information.
- Create the User Acceptance Test Plan with input and recommendations from Accela
- Make available the appropriate County key users and content experts to participate in UAT.
- Review and provide feedback on the four (4) test scripts developed by Accela
- Develop the User Acceptance Test scripts beyond the four (4) provided by Accela for each Phase.
- Utilize the use cases documented in each Accela Civic Platform Solution Foundation Document as the basis for the acceptance of this deliverable.

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 16: 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 Phase. Accela also must provide two staff onsite for the week prior to Go Live to provide support for each Phase. 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 Phase.

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 week prior to go live to support the move to Production effort.
- 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 Phase

- 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 17: Post Deployment Support & Transition to Customer Support

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 two weeks immediately following deployment (Go-Live) for each Phase. Final Acceptance is defined as County turnover to Accela Customer Support for ongoing support and maintenance. This occurs when the two weeks 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).

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 Phase, the County will assume full responsibility for the maintenance of the functionality and records in that Phase and will work with Accela support, not onsite Accela resources, to resolve issues or modify/create functionality.

Accela Responsibilities:

- Provide two staff on-site for two weeks immediately following go-live for each Phase 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 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.

Full time 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
- 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 19: ONBASE EDR AND EDMS INTEGRATION

The County uses Hyland's OnBase software for records management and for plan review. The Hyland solution offers an OnBase Accela Adapter (Adapter) that provides features and functions to integrate data and information between the Accela Civic Platform and OnBase. The County will purchase, install, configure and test the Adapter. Accela will provide up to 10 hours of support for the configuration, testing and deployment of the Adapter. Accela support will be tracked by each Accela project team member as the hours are used and will include a description of how the time was used.

The County and Accela will finalize the OnBase/AA Architecture and EDMS integration in preparation for the gap analysis sessions. Prior to the restart of the project, the County will review and confirm the functional requirements that were provided as part of the assessment of the EDR options in June of 2017, to be leveraged to finalize the integration. After development of the OnBase/AA Architecture and EDMS integration is complete, a representative sample of records agreed upon by both Accela and the County will be chosen from across both Phases I and II (no more than five total) and will be fully configured based on the Electronic Document Review (EDR) requirements. On-site work session(s) will occur to review the functionality with the County business staff to a maximum of 20 hours. During these work sessions, the functional requirements identified by the County in June 2017 will be validated by the County business staff for the representative record types. The County will document feedback to any of the requirements in an EDR Feedback Document and the County and Accela will review and determine a resolution to the feedback and incorporate it into the EDR Feedback Document. Upon completion of any actions related to these responses, the completed OnBase/AA Architecture, along with the completed EDR Feedback Document (including resolution), this deliverable will be complete.

EDR will be implemented for Phase II 'as-is' based on analysis and approvals complete in Phase I. Any new changes or adjustments to this completed deliverable for Phase I that the County may determine are required to implement Phase II will be deemed out of scope under this Amendment.

Accela Responsibilities:

- Work with Arlington to identify a total of five record types that will provide a representative sample of records chosen from the Phase I and II record type lists
- Work with Arlington OnBase staff to develop the five identified record types, meeting the requirements identified in Appendix E *to this Amendment Number 2 (Attached) WFB 2/28/18*
- Work with Arlington OnBase staff to integrate the OnBase Plan Review Portal with ACA, including modifying ACA pages as needed to allow for registered ACA users to authenticate with OnBase, upload required documents to OnBase, upload plan documents and revisions to OnBase, and execute OnBase workflow actions
- Work with Arlington OnBase staff to integrate the OnBase Unity Client with AA, including modifying the AA screens based on record type and status, to prevent workflow from being executed in AA

- Work with Arlington OnBase staff to utilize Accela Web Services for updating record status and other fields associated with the record
- Jointly with the County, conduct Work Sessions to review the EDR functionality up to a maximum of 20 hours
- Review the EDR Feedback Document from Arlington regarding the functionality/requirements reviewed during the work sessions and work with Arlington decision makers to resolve issues raised and document in the EDR Feedback Document
- Make any corrections to the Accela systems to resolve the feedback
- Provide up to 10 hours of support for the OnBase Accela Adapter setup
- Document hours spent on support for setup of the OnBase Accela Adapter, identifying Accela project team member and activity

County Responsibilities:

- Provide feedback at the end of the work sessions create the EDR Feedback Document to document issues.
- Work with Accela to determine resolution to any issues brought up during the work sessions and document in the EDR Feedback Document
- Resolve any non-Accela issues identified during the work sessions.
- Acquire the OnBase Accela Adapter, OnBase Plan Review Integration Toolkit and services for deployment
- Implement the OnBase Accela Adapter and utilize the OnBase Plan Review Integration Toolkit to complete the integration between OnBase and AA.
- Configure OnBase Plan Review, Workflow, Letter Templates and Notifications to facilitate the workflow process for record types requiring Plan Review

Deliverable 20: Security Set-up

Accela will work with the County 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 21: Accela GIS Deployment

Accela will install and configure Accela GIS to use existing County GIS information and will assist the County with establishing the map service. Accela will test the configuration, including performance, based on the previously completed To-Be Analysis stage. As part of this Deliverable, Accela will set up the following GIS features and will train the County how to configure these features:

- Proximity Alerts
- Dynamic Themes
- Attribute Mapping

Accela Responsibilities:

- Install and configure the Accela GIS software, including the GIS XAPO used for managing Address, Parcel, and Owner information.
- Configure two each of: Proximity Alerts, Dynamic Themes and Attribute Mapping and Unit Test.
- Demonstrate that the Accela GIS applications and aforementioned features are operational in the County environment.
- Train County GIS Lead and Solution Manager on configuring Proximity Alerts, Dynamic Themes and Attribute Mapping and provide documentation of the aforementioned procedures included in the training. This training session will be conducted remotely by Accela GIS Lead.

County Responsibilities:

- Provide information and data that will be needed for the GIS implementation in formats specified by Accela.

II. Amend Exhibit B ("Pricing and Payment Schedule") of the Agreement as follows:

Fee Summary – Delete the second table

Fee Schedule – Replace the Implementation Services Fees table with the table below:

REVISED DETAILED PAYMENT SCHEDULE

Payments made before the execution of this Amendment 2 will not be applied toward the deliverables listed in the table below.

Travel Expenses

Accela will provide on-site personnel as needed for a minimum of 206 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 \$102,825.00. 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.

Deliverable	Phase 1 Services	Phase 2 Services	Total Services
Deliverable 01: Project Initiation	\$6,660.00	\$3,463.20	\$10,123.20
Deliverable 02 - AMD2: Record Type Finalization	\$21,652.40	\$47,488.00	\$69,140.40
Deliverable 03- AMD2: Record Type Gap Analysis by Department	\$30,679.00	\$37,848.57	\$68,527.57
Deliverable 03 - Payment Department Split:			
D03 CPHD/HP, ISD: P1A: \$3,834.88			
D03 DES: P1B: \$9,587.19			
D03 Planning: P1C \$10,545.91			
D03 Zoning: P1D - \$6,711.03, P2A: \$8,734.29			
D03 ISD: P2B: \$25,232.28			
D03: DES/DHS/Multi: P2C: \$3,881.90			
Deliverable 04: Historic Data Conversion Analysis	\$49,950.00	\$41,440.00	\$91,390.00
Deliverable 05: Historic Data Conversion Development	\$49,950.00	\$41,440.00	\$91,390.00
Deliverable 06: Interface Analysis and Development	\$30,932.00		\$30,932.00
Deliverable 06 - Payment Interfaces Split:			
D06 - Financials: P1A: \$15,466			
D06 - DPOR: P1B: \$7,733			
D06 - ACE: P1C \$7,733			
Deliverable 07: EDR Analysis	\$5,652.12		\$5,652.12
Deliverable 08: Selectron IVR-Interactive Voice Response System Interface	\$2,249.60		\$2,249.60
Deliverable 09: Business Process Validation and Automation (Scripting)	\$135,512.00	\$42,346.62	\$177,858.62
Deliverable 09: Payment Split by Scripts Completed - see Table 4			
Deliverable 10: Report Specifications and Development	\$56,976.14	\$32,886.10	\$89,862.24
Deliverable 10: Payment Split by Reports Completed - see Table 5			
Deliverable 11: Accela Citizen Access Deployment	\$59,940.00	\$19,358.40	\$79,298.40
Deliverable 12: Accela Mobile Deployment	\$11,470.00	\$5,964.40	\$17,434.40
Deliverable 13: Administrative Training	\$25,900.00		\$25,900.00
Deliverable 14: Train the Trainer	\$10,920.00	\$4,128.46	\$15,048.46
Deliverable 15: User Acceptance Testing	\$29,600.00	\$15,392.00	\$44,992.00
Deliverable 16: Production Support	\$22,200.00	\$11,544.00	\$33,744.00
Deliverable 17: Post Deploy Support & Transition to Customer Support	\$44,400.00	\$23,088.00	\$67,488.00
Deliverable 18: Project Management	\$481,000.00	\$115,431.00	\$596,431.00
Phase 1: thirteen (13) monthly payments totaling: \$37,000			
Phase 2: eleven (11) payments totaling: \$10,493.73			
Deliverable 19: ONBASE EDR AND EDMS INTEGRATION	\$22,496.00		\$22,496.00
Deliverable 20: Security Set-up	\$22,200.00	\$11,544.00	\$33,744.00
Deliverable 21: GIS Deployment	\$18,500.00		\$18,500.00
Total	\$1,138,839.26	\$453,362.75	\$1,592,202.01

Total Amendment Amount: \$1,695,027.01 (including travel expenses)

III. Replace Section 46 ("Notices") in its entirety with the following:

NOTICES

Unless otherwise provided in writing, all written notices and other communications required by this Contract are deemed to have been given when either (a) delivered in person; (b) delivered by an agent, such as a delivery service; or (c) deposited in the United States mail, postage prepaid, certified or registered and addressed as follows:

TO THE CONTRACTOR:

Accela, Inc.
2633 Camino Ramon, Ste. 500
San Ramon, CA 94583
(888)-722-2352
amowry@accela.com

TO THE COUNTY:

Deborah Albert, Project Officer
2100 Clarendon Blvd., Suite 700
Arlington, VA 22201
(703)-228-3533
dalbert@arlingtonva.us

AND

Michael E. Bevis, Purchasing Agent
Arlington County, Virginia
2100 Clarendon Boulevard, Suite 500
Arlington, Virginia 22201

All other terms and conditions of the Agreement shall remain in full force and effect.

WITNESS THESE SIGNATURES:

THE COUNTY BOARD OF ARLINGTON
COUNTY, VIRGINIA

AUTHORIZED
SIGNATURE: _____

PRINT

NAME: MICHAEL BEVIS

TITLE: PURCHASING AGENT

DATE: 2/28/18

ACCELA, INC.

AUTHORIZED
SIGNATURE: _____

PRINT

NAME: Maximilian Schnoedl

TITLE: CGO

DATE: February 27, 2018

APPENDIX E

Arlington Electronic Document Review Requirements

#	Category	System Requirement	Integrated Accela/OnBase Solution Functionality
1	Comments	Comments are shared between EDR and Accela Automation	Comments are entered at the document or project level in OnBase, and are shared with the Submitter via the Comment Letter and Plan Set published on the integrated Accela/OnBase portal, and available by clicking the OnBase button on any project in Accela Automation.
2	Comments	If a sheet is removed/replaced, comments are removed as well	If a sheet is deleted, the comments still exist in the OnBase database, but they will not be displayed with the project. However, deleted documents can be restored by authorized county staff to see the comments or to undelete the document. If a sheet is replaced (uploaded as a revision), the comment will still be associated with the document, and will display for the Reviewer to determine whether it is resolved.
3	Comments	Identify if a comment is open or resolved.	Yes
4	Comments	Edit a comment from a previous review cycle	By default, Comments are not editable when the project returns in a new review cycle. However, this can be customized to automatically make them editable.
5	Comments	Ability to create a standard library of comments that users can select from	Yes
6	Comments	Ability to upload ICC or other standard codes	Yes
7	Documents	Submit each sheet individually or combined. When resubmitting allow user to only submit the altered pages and have them inserted into the original document. Keep all comments.	Both options are available to the Submitter. Comments are kept as long as the associated document is not deleted. Documents deleted by the Submitter are placed in a Pending Delete status until they are reviewed by the County.
8	Documents	Supported document formats	Practically any format could be allowed and comments can be added regardless of file type (PDF, CAD, etc.). The County currently limits the Submitter to uploading PDFs only. Document markup is limited to PDFs.

APPENDIX E

#	Category	System Requirement	Integrated Accela/OnBase Solution Functionality
9	<i>Documents</i>	Maximum file size	The file size limitation is configurable. Most very large files can be opened in OnBase without experiencing performance issues, but consideration should be given to the long-term impact of allowing larger files and concerns around external system compatibility.
10	<i>Documents</i>	System to be able to handle versioning when applicant submits a revised copy:	Yes, documents are automatically stored as revisions based on the file name. The file name can be changed as needed, or the Applicant can browse for a revision regardless of file name.
11	<i>Documents</i>	Ability to locate a specific sheet in an uploaded set of plans	If the sheets are submitted as separate sheets, it is easy to find a sheet, as they are organized by discipline and sheet type. If sheets are submitted as one combined document, OnBase will have the same challenges as would be expected with viewing a large multi-page PDF in Adobe.
12	<i>Documents</i>	Ability to associate and review a single set of plans for multiple records (ex. a single set of plans for townhomes that are approved as separate permits).	Yes. But the permit is issued at the same time for all the projects sharing the set.
13	<i>Integration - ACA Portal</i>	Customize the Accela Citizen Access portal user interface to include OnBase components	Ability to upload documents to OnBase from the Record Issuance page in Accela and from a Plan Documents tab when returning to the record later in Accela. Document upload should include Plan Review Documents and other Required Documents. Display additional tabs in Accela for 1) Markup & Comment Letters, and 2) Approved Documents.
14	<i>Integration - ACA Portal</i>	Integrated Portal User Creation and Authentication between OnBase and Accela	Automatically create OnBase portal user if user does not exist upon Accela Permit Record Issuance. Automatically authenticate to OnBase portal when loading it as a frame within the Accela portal (record issuance or clicking any OnBase portal tab from Accela portal).

APPENDIX E

#	Category	System Requirement	Integrated Accela/OnBase Solution Functionality
15	<i>Integration - ACA Portal</i>	Initiate OnBase Project Creation and Updates from the Accela Citizen Access Portal	Automatically create an OnBase project upon Accela Permit Record issuance when plan review is required, based on record type configuration. The created OnBase project should contain Project ID (Record ID), Project Name, Address, Review Type. The created OnBase project should also store the required documents based on answers to application questions. The created OnBase project should be updated as needed each time customer saves changes to application.
16	<i>Integration - ACA Portal</i>	Include a Required Documents Upload that is separate from the Plan Review Documents Upload	A custom HTML and OnBase API solution will be developed to allow for browse and upload from the ACA portal to OnBase. Customer will be allowed to upload, delete or replace uploaded documents depending on the status of the record.
17	<i>Integration - Civic Platform</i>	Allow opening OnBase to specific plan review project from matching record in Accela Civic Platform	A button will display throughout the Accela record when it requires plan review. OnBase Application Enabler will be configured to launch Plan Review from the button.
18	<i>Integration - Civic Platform</i>	Allow OnBase documents to be viewed from the Accela Civic Platform Documents tab	The OnBase/Accela adapter will be configured to allow document retrieval and upload from OnBase.
19	<i>Integration - Workflow</i>	Update the Accela record status throughout the EDR workflow process in OnBase	OnBase will call Accela actions via web services to update the record status as needed.
20	<i>Integration - Workflow</i>	Move the OnBase project through workflow based on actions taken in Accela	Accela will call OnBase actions via web services to update the project as needed and initiate any required workflow.
21	<i>Markup/Tools</i>	Ability to include a final stamp that automatically updates all sheets with the stamp. (i.e. one action to stamp all pages of the document)	Yes
22	<i>Markup/Tools</i>	Ability to provide a transparent final stamp	Yes
23	<i>Markup/Tools</i>	Ability to color code the markups and comments by reviewer (i.e. water reviewer comments and markup are blue, fire reviewer comments/markups are red)	Yes. However, each reviewer must set the default markup color. It will not automatically cannot be set by Administrator.
24	<i>Markup/Tools</i>	Ability to do standard measurements	Yes (e.g. length, area, perimeter)
25	<i>Markup/Tools</i>	Ability to compare the revised pages against the original pages	Yes

APPENDIX E

#	Category	System Requirement	Integrated Accela/OnBase Solution Functionality
28	<i>Reports</i>	Able to produce an Audit Log of actions taken against the plans (comments, measurements, etc.)	The OnBase Audit log includes comments and markup, as well as viewing, modifying, deleting, printing, sharing, exporting, and more. Measurements are not included in the audit log.
29	<i>Reports</i>	Ability to produce a report to the applicant that includes all comments/issues identified (Revision Report)	Letters can be sent to the Applicant after the completion of each review cycle, and upon approval, which are configurable to include project/permit summary information, comments, decisions, and any other data from OnBase or Accela.
26	<i>Workflow</i>	Manage resubmitting and reviewing records after issuance (Active Revision), during the inspections process.	Yes, the project can be resubmitted by the customer, and is automatically routed to the reviewers from the most recent submission, or to the Manager of the Review Group, depending on the configuration for the group. The OnBase and Accela configuration will be modified as needed to accommodate the active revision process.
27	<i>Workflow</i>	Prevent users from uploading documents while in review	Yes, but OnBase provides the ability for Authorized County staff to override and allow submitter uploads on a project at any time as needed.
30	<i>Workflow</i>	Automate the Plan Coordination workflow task. Automatically complete the plan coordination task(s) with the status based on the status entered in EDR (either initiate Revision process or move forward based on Approval). After the plans are approved in EDR, notify applicant of approval, and grant access to print/pay fees as necessary.	Yes, there are a variety of automated processes for Plan Coordination and Project assignment, varying by Department / Review Group, permit type, and other factors. Configuration can be modified as needed using point-and-click configuration and scripting. Workflow will need to be reconfigured to integrate with Accela. It's likely that some existing components will be removed, added, or modified, while others will remain the same. Plan Set and Comment Letter creation currently require quick end user interaction with the project, but it is expected that this can be automated in OnBase 18 (planned for release in Spring/Summer 2018).
31	<i>Workflow</i>	Assign multiple reviewers to a single document/workflow task	Allow for any combination of reviewers to be assigned across any combination of review groups and for a user to be assigned in multiple groups.